



# Workforce

*florida, inc.*

## Board of Directors Meeting

May 22, 2013  
8:30 a.m. to 12:30 p.m. ET  
Grand Hyatt Tampa Bay  
2900 Bayport Drive  
Tampa, FL 33607



# Board of Directors Meeting Agenda

MAY 22, 2013 • 8:30 A.M. - 12:30 P.M. ET

GRAND HYATT TAMPA BAY  
2900 BAYPORT DRIVE, TAMPA, FL 33607

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## Chairman's Welcome & Opening Remarks

*Dwayne Ingram*

- Chairman's Challenge

## Regional Workforce Board Updates

- Florida Workforce Chairs' Alliance
- Florida Workforce Development Association

*Steven Parrish*

*Richard Williams*

## President's Report

*Chris Hart*

## Consent Items

- Approval of Minutes *Tab 1*
- Approval of Waiver Review Committee Recommendation *Ric Shriver Tab 2*
- Direct Provider Designation *Scott Fennell Tab 3*

## Action Items

- Funding Allocations *Scott Fennell Tab 4*
- 2013-2014 Targeted Occupations List *Jayne Burgess Tab 5*
- Florida Workforce System Branding Recommendations  
*Adriane Grant / IDEAS of Orlando Tab 6*



## **Council Dialogue**

- Finance & Efficiency Council
- Global Talent Competitiveness Council
- Performance Council

***Andy Perez*** Tab 7

***Ric Shriver*** Tab 8

***Britt Sikes*** Tab 9

## **New Business & Public Comment**

### **Chairman's Closing Remarks**

***Dwayne Ingram***

### **Information Items**

Tab 10

- Councils Membership List
- 2013 Meeting Schedule

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## **UPCOMING MEETINGS**

Workforce Florida Executive Committee Meeting  
July 17, 2013

Workforce Florida Board of Directors/Councils Meetings  
August 28-29, 2013  
Palm Beach County



# Consent Item

## APPROVAL OF MINUTES

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In accordance with Article VII, Section 7.3, of the approved By-Laws, the Corporation is required to keep correct and complete books and records of account and shall keep minutes on the proceedings of the Board. Draft minutes for the February 20, 2013 Executive Committee meeting, the February 21, 2013, Board of Directors meeting and the April 17, 2013 Executive Committee meeting have been prepared for approval by the Board.

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## NEEDED ACTION

**To approve the draft minutes of the previous Board meetings to include any modifications or changes noted by the Board.**



**DRAFT MINUTES  
OF THE WORKFORCE FLORIDA INC.  
BOARD OF DIRECTORS  
EXECUTIVE COMMITTEE MEETING  
February 20, 2013**

**Call to Order**

Board Chairman Dwayne Ingram called the meeting of the Workforce Florida Executive Committee to order at 3:00 p.m. ET on February 20, 2013, by welcoming all to the meeting. He thanked 2013 sponsors to date including platinum sponsors Coldwell Banker Commercial AI Group, the Florida Chamber and Mileo Group; gold sponsors the Florida High Tech Corridor Council, Gulf Power Company, Sourcingboard and The Academy – Miami Campus; and silver sponsors Blank & Meenan, PA, Capital Regional Medical Center and BlueStar Marketing. He encouraged members to think of additional potential sponsors, and mentioned that he hopes Workforce Florida will be able to assist in sponsoring next December's Workforce Academy for front-line staff.

**Roll Call/Quorum**

A quorum was present with the following Executive Committee members in attendance:

|                              |                   |
|------------------------------|-------------------|
| Chairman Dwayne Ingram       | Ms. Leslie Ingram |
| Vice Chairman Jennifer Grove | Mr. Andy Perez    |
| Ms. Mary Lou Brunell         | Mr. Ric Shriver   |
| Mr. Kevin Doyle              | Mr. Britt Sikes   |

**Welcome & Chairman's Remarks**

Chairman Ingram noted his goals for 2013 and asked for assistance in developing an acronym that would assist in keeping goals top of mind:

- Business- and Industry-led
- One Workforce System
  - Colleagues, not competitors
- Continue building Florida's Talent Supply System

He also noted that due to President/CEO Chris Hart IV's announcement of his intention to step down at the end of June, another key goal is a smooth transition of leadership. He said he is very grateful to President Hart for his leadership, and cognizant of what a significant job it will be to find a new leader to take on such a critical position. Chairman Ingram said the official announcement will be made during the board meeting the following day and an official search committee will be named shortly.

Chairman Ingram introduced the new Executive Director of the Department of Economic Opportunity, Jesse Panuccio, for brief remarks. Mr. Panuccio thanked the Executive Committee

for welcoming him and said he was excited to begin working with workforce system partners to advance Governor Scott's priorities. President Hart noted the significant trust the Governor and other high-level leaders have in Mr. Panuccio and his leadership skills and expressed his confidence that Mr. Panuccio will be an exceptional partner in moving the workforce system forward.

### **Special Council**

Chairman Ingram said one of his goals had been to establish a Workforce Florida foundation that could fund special initiatives. He said he appreciates the leadership of Mr. Ben Grzesik and Global Talent Competitiveness Council Vice Chairman Leslie Ingram for their willingness to serve on a Special Council to research the formation of such a foundation, and the assistance of Workforce Florida General Counsel Jay Barber and Executive Vice President/CFO Scott Fennell in serving as staff leads on the project. He introduced Mr. Barber for brief remarks.

Mr. Barber said he had reviewed other organizations' foundation structure, noting that Workforce Florida is a 501(c)(3) organization. The possibility of setting up a separate charitable organization was researched, and it was determined the process would be labor-intensive and potentially costly. Workforce Florida's bylaws allow for the formation of an organization within the organization via a special committee or council. Mr. Fennell noted that Workforce Florida is already set up to receive and account for private funds. Chairman Ingram added the accounting would be kept separately and the membership would involve separate leadership and some outside members, with a majority not being board members.

He introduced Mr. Grzesik, who will chair the Special Council, for remarks, adding that Ms. Ingram will be the Council's Vice Chairman.

Mr. Grzesik said he appreciates the opportunity to serve. He noted the foundation will allow Workforce Florida to further its mission, goals, and its relationships with private industry. He said a formal structure will be developed to clearly define how contributions will be invested, accounted for and used in support of Workforce Florida's mission. Rules and governance will have to be developed and approved. He said he looks forward to the process and assistance and input from the board.

Chairman Ingram noted board Vice Chairman Jennifer Grove will oversee the selection of additional Special Council members.

Ms. Mary Lou Brunell asked whether one of the ad hoc members would have a philanthropic background, noting that would be important to have at the onset of the Council.

Mr. Grzesik asked board members with additional input after the meeting to provide those suggestions to Mr. Barber.

Ms. Grove also noted the Florida Education Foundation might provide some helpful information in terms of structure, receipt of funds, etc. Ms. Brunell noted the Florida College System has a foundation as well.

Mr. Andy Perez asked how communications could be handled efficiently under Sunshine Law guidelines. Mr. Barber said the Council would be subject to the Sunshine Law. Chairman Ingram reiterated that Mr. Barber would serve as the main staff contact for the Council for any questions or input. Vice Chairman Grove noted that although this is the direction the Council believes the foundation will go, there may be decisions down the road that a different structure would be more practical.

### **Legislative Session 2013**

Chairman Ingram introduced House Speaker Will Weatherford for remarks, noting his commitment to education.

Speaker Weatherford said he was honored to have the opportunity to talk with the Executive Committee. He said he and Senate President Don Gaetz are working on a joint agenda to help the legislative process be more efficient and effective this spring. He said the agenda consists of three areas, the first of which is trust in government. He said he hopes proposed ethics and election reform legislation will help restore trust in government. The second area is education, and he pledged a major emphasis on higher education in particular. His third area of focus is fiscal solvency, which he plans to advance through state pension reform.

He opened the floor to questions. Vice Chairman Grove asked for elaboration on his plans for addressing fiscal solvency. Speaker Weatherford provided an overview of his concerns about the state pension system.

Chairman Ingram mentioned the challenges in connecting open positions with college graduates who don't have the right skills match. He asked if the Speaker had any specific ideas, and whether he would consider incenting the Bright Futures Scholarship program to encourage graduates to stay in Florida. Speaker Weatherford applauded President Gaetz's pending enhancements to the Career and Professional Education Act. He mentioned thoughts on creating a diploma specifically for high school students who plan to go directly into the workforce upon graduation. He also thinks universities and colleges should be more accountable for showing how many of their students in which programs get jobs. He would like to see more metrics and transparency that students and parents could access.

Vice Chairman Grove suggested that an alternative pathway for high school students should include industry input on what academics should be required or not required. She said it is critical to have industry involved in such discussions and not rely on outdated perceptions of what a non-college-bound student might need to succeed in a technical career. Speaker Weatherford said he would be interested in having board members review the bill language once it is drafted.

Ms. Brunell noted that in nursing, many graduates with bachelor's degrees are being produced but the need is still not being met because the industry needs master's level nurses or those with specialized certification and/or experience.

Speaker Weatherford noted that jobs in demand are changing faster than our educational facilities are able to innovate and prepare people for those jobs.

President Hart thanked Speaker Weatherford for his time and insights.

Vice Chairman Grove observed that it was interesting that there is a perception that Workforce Florida and the regional workforce boards are able to compel connectivity between industry and education, although that is not the nature of Workforce Florida's role. She noted that Workforce Florida can encourage collaboration but not compel it.

President Hart noted that Workforce Florida is the primary organization pushing for that collaboration. He added his appreciation of the concept of a Talent Supply System versus the various components of a Talent Supply Chain, and that he thinks that is the direction the board should be moving.

Ms. Brunell noted opportunities that are not taken advantage of by industry, noting a recent curriculum review by the Department of Education for healthcare curricula. She mentioned that DOE struggled with industry participation. She said while education may desire the input, finding mechanisms to engage industry and secure input can be a challenge.

Chairman Ingram noted his appreciation of Speaker Weatherford's willingness to share bill language and expressed his interest in encouraging that practice.

Workforce Florida Director of Operational Support April Money noted that under the current structure, workforce and economic development are considered by the same legislative committees but education is considered by separate committees. President Hart noted that recently, and for the first time, Workforce Florida was invited to present before a new House Higher Education and Workforce Committee, which he considers movement in the right direction. Ms. Money noted one of the newest board members, Rep. Jeanette Nunez, chairs the House Higher Education Council and added that she will bring a valuable perspective. President Hart referenced another new house member, Rep. Keith Perry, who owns a roofing company and will bring a valuable small business perspective.

Performance Council Vice Chairman Kevin Doyle mentioned how valuable he thought the joint meeting with Enterprise Florida in November has been, and he wondered if something similar could be arranged with the Board of Governors or other components of the college and university systems.

Finance & Efficiency Council Chairman Andy Perez noted Higher Education is already moving in the direction of a second pathway for students who aren't seeking a four-year degree. He said this second pathway is more cost-effective for many students. He suggested the Employ Florida Marketplace could have more value if it could capture placement data along with the credentials and levels of education of the individuals placed. He thought that information would be very valuable to legislators in drafting policy.

### **Closing Remarks**

In closing, Chairman Ingram asked Executive Committee members to think about plans for a workday at a regional board and help with an acronym that might speak to the board's goals for 2013. He thanked the participants and partners and adjourned the meeting at 4:30 p.m.

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**Board Secretary Certification**

In accordance with Article VII, Section 7.3, I hereby certify that these minutes reflect the proceedings by the Board of Directors of Workforce Florida, Inc., have been reviewed by the Board, and approved or approved with modifications which have been incorporated herein.

\_\_\_\_\_  
Chris Hart IV  
Board Secretary

\_\_\_\_\_  
Date

**DRAFT MINUTES OF THE WORKFORCE FLORIDA INC.  
BOARD OF DIRECTORS MEETING  
February 21, 2013**

**Call to Order/Opening Remarks**

Board Chairman Dwayne Ingram called the meeting to order at 12:35 p.m. ET. At the Chairman's invitation, Workforce Plus Executive Director Kimberly Moore led the board in the Pledge of Allegiance.

Chairman Ingram recognized new board members Reps. Jeanette Nunez and Keith Perry, Department of Economic Opportunity Executive Director Jesse Panuccio and appointee Christy Daly, Deputy Secretary at the Department of Juvenile Justice, whose membership as designee for Sec. Wansley Waters was to be voted upon by the board.

**Roll Call/Quorum**

Following brief remarks, Chairman Ingram requested a roll call. A quorum was present with the following board members in attendance:

|  |  |
|--|--|
| Mr. Dwayne Ingram, Chairman                  | Dr. William "Bill" Law                   |
| Ms. Jennifer Grove, Vice Chairman            | Commissioner Lumon May                   |
| Mr. David Armstrong                          | Dr. Ed Moore                             |
| Mr. James Baiardi                            | Mr. Alex Moseley                         |
| Mr. Dan Baldwin                              | Rep. Jeannette Nunez                     |
| Mr. Rod Duckworth (for Commissioner Bennett) | Exec. Dir. Jesse Panuccio                |
| Mr. Randy Berridge                           | Mr. Andy Perez                           |
| Dr. Brittany Birken                          | Rep. Keith Perry                         |
| Ms. Mary Lou Brunell                         | Ms. Linda Reiter                         |
| Sec. Charles Corley                          | Ms. Maria D. Rodriguez                   |
| Mr. Kevin Doyle                              | Mr. Wayne Rosen                          |
| Mr. Matthew Falconer                         | Mr. Ric Shriver                          |
| Mr. Benedict Grzesik                         | Mr. Britt Sikes                          |
| Mr. George Hauer                             | Dr. Linda Sparks                         |
| Ms. Leslie Ingram                            | Mr. Al Stimac                            |
| Mr. Eric Kennedy                             | Ms. Christy Daly (for Secretary Walters) |

Board members not in attendance were Governor Rick Scott, Mr. Don Gugliuzza, Mr. Steven Sonenreich and Secretary David Wilkins.

Chairman Ingram thanked board members for their ongoing commitment of time and effort. He thanked Vice Chairman Jennifer Grove and the board chairs at the regional level for their continued leadership.

Chairman Ingram noted the success of the previous evening's reception, hosted by Governor Rick Scott and First Lady Ann Scott. He thanked 2013 sponsors, including platinum sponsors Coldwell Banker Commercial AI Group, the Florida Chamber and Mileo Group; gold sponsors the Florida High Tech Corridor Council, Gulf Power Company, Sourcingboard and The Academy – Miami Campus; and silver sponsors Blank & Meenan, PA, Capital Regional Medical Center and BlueStar Marketing.

In providing a recap of the previous day's Executive Committee meeting, Chairman Ingram introduced the Department of Economic Opportunity's new Executive Director, Jesse Panuccio, who addressed the committee. He invited Mr. Panuccio to address the full board. Mr. Panuccio expressed his appreciation for the opportunity to be a member of the board and his excitement at the privilege of leading DEO. He introduced members of his leadership team and invited board members and regional workforce board partners to connect if there is anything they can do to assist with projects or questions.

Chairman Ingram noted his goals for 2013:

- Business- and Industry-led
- One Workforce System
  - Chairman's Colleague Award – recognition of best practices that are or can be shared among regions; further details to come
- Continue building Florida's Talent Supply System
- Smooth transition of leadership

Mr. Ingram referenced the impending departure of Workforce Florida President/CEO Chris Hart IV, pledging a smooth transition beginning with a formal search process for a new president/CEO. He also noted the Executive Committee meeting included an outstanding discussion with Florida House Speaker Will Weatherford.

He thanked Mr. Ben Grzesik and Ms. Leslie Ingram for their work on the board's Special Council to explore the formation of a Workforce Florida foundation, adding that additional information would be available in May. He said Vice Chairman Jennifer Grove will assist with naming additional members to the council. The foundation's purpose will be to fund special projects that originate at the board or regional level that the board would like to advance. He thanked Florida Workforce Chairs' Alliance (FWCA) Chair Lenné Nicklaus-Ball for expressing the Chairs' support of the foundation concept.

Chairman Ingram extended a special thank you to Chair Nicklaus-Ball and the FWCA for inviting the board to participate in their meeting earlier that morning, and for attending the Workforce Florida board meeting in return.

Chairman Ingram concluded his remarks by issuing a Chairman's Challenge to board members to visit at least one regional workforce board by the May meeting and plan to report out on the visit(s). He recapped his and President Hart's recent visit to the Tampa Bay WorkForce Alliance and expressed his appreciation to President/CEO Ed Peachey and Chief Operating Officer Mark



Douglass for assisting with the visit. He thanked regional board member Dick Peck and Workforce Florida board member Al Stimac for coordinating the visit.

Chairman Ingram highlighted a recent news article about Workforce Central Florida's mobile training program and applauded Executive Director Pam Nabors and her team for their significant and ongoing efforts to better serve businesses and job seekers.

### **Race to Place**

Chairman Ingram introduced Stacy Campbell-Domineck, President and CEO of Polk Works, to present information on her region's Race to Place program. He noted that initiatives such as Race to Place are helping the state workforce system achieve Governor Rick Scott's 2013 goals of 50,000 placements a month and 600,000 placements by year's end.

Ms. Campbell-Domineck said the program's goal is to place 10,000 job seekers in positions in six months with the support and assistance of Polk County's employers. She met with 100 employers in two weeks' time to enlist their support, and all 100 signed on to the initiative. The 17 municipalities in the county are on board as are the chambers and economic development partners. The focus of the initiative is to get employers to list openings in the Employ Florida Marketplace and get job seekers registered. She said the initiative has been a huge success so far, noting many partners, including a local transportation company that provided \$1,000 in bus passes to assist job seekers in getting to work, and Wells Fargo's provision of vouchers for haircuts for job seekers in need as examples. She added that the local bus company is displaying Race to Place signage free of charge.

### **Florida Workforce System Branding Update**

Chairman Ingram thanked Ms. Campbell-Domineck and introduced the members of Team IDEAS to present an update on the statewide workforce system branding initiative, remarking that IDEAS has done an exceptional job and thanking the many partners who have been and continue to be actively engaged in this vital effort. He noted there has been 100 percent participation from the 24 regional workforce boards. He explained that IDEAS is not presenting the brand recommendation at this meeting, but its findings from research-based strategic market analysis and collaborative input from stakeholders throughout the workforce system. He thanked Workforce Florida Vice President of External Affairs and Board Relations Adriane Glenn Grant for leading this effort on behalf of Workforce Florida, and noted information, reports and updated materials on the branding initiative can be found on Workforce Florida's website at [workforceflorida.com](http://workforceflorida.com).

Chairman Ingram introduced Mr. Bob Allen of IDEAS, who provided an overview of work to date. Mr. Allen remarked on the challenge of creating a brand for an extraordinary, highly performing system that instantly conveys that success story. He said the last several months had involved developing an understanding, on a research and collaborative input basis, of the workforce system as it exists today. This must be completed before the effort can turn to what the system could be.

Due to some technical difficulties, Chairman Ingram temporarily postponed the branding discussion and moved to the Consent Items on the agenda.

#### **CONSENT ITEM – Approval of Designee**

Chairman Ingram recognized Ms. Christy Daly, Deputy Secretary, Department of Juvenile Justice, and asked members to approve Ms. Daly as the designee for Secretary Wansley Walters.

***Motion: To approve Ms. Daly as the designee for Wansley Walters, Secretary, Florida Department of Juvenile Justice.***

*Motion: Ms. Jennifer Grove*

*Second: Mr. George Hauer*

The motion passed unanimously.

#### **CONSENT ITEM – Approval of Minutes**

Chairman Ingram asked members to approve the minutes from the most recent board and Executive Committee meetings.

***Motion: To approve the draft minutes of the previous board meetings to include any modifications or changes noted by the board.***

*Motion: Mr. Alex Moseley*

*Second: Mr. Daniel Baldwin*

The motion passed unanimously.

#### **CONSENT ITEM – Approval of Waiver Review Committee Recommendation**

Chairman Ingram thanked Waiver Review Committee Chairman Ric Shriver, committee members and Workforce Florida staff for their time and efforts and invited Mr. Shriver to provide remarks. Mr. Shriver acknowledged the efforts of Ms. Sheryl Rehberg, Executive Director for Region 6, the North Florida Workforce Development Board and noted her presentation was extremely thorough. He said after considering the application and presentation by Ms. Rehberg on January 31, the committee approved a recommendation to the board of an ITA reserve requirement of 25 percent as requested.

Additional information on this item is contained in the board book.

***Motion: To adopt the recommendation of the Workforce Florida Waiver Review Committee: The ITA reserve requirement, as requested by Region 6, be reduced from 50 percent to 25 percent.***

*Motion: Mr. Ric Shriver*  
*Second: Dr. Linda Sparks*

The motion passed unanimously.

### **ACTION ITEM – Approval of Legislative Agenda**

Chairman Ingram introduced Workforce Florida Director of Organizational Support April Money to explain the action item. Ms. Money noted Governor Scott's Florida Families First budget for 2013-2014 recommends a total funding level of about \$379.8 million for Florida's workforce system. Workforce Florida's priority for the 2013 legislative session will be support for Governor Scott's workforce system funding recommendations, including an increase in Quick Response Training (QRT) funding to \$12 million.

Chairman Ingram remarked that Ms. Grove presented Governor Scott with the Workforce Champion Award on behalf of the board at the previous evening's reception in recognition of his support of the workforce system and the QRT program.

Additional information on this item is contained in the board book.

***Motion: To approve the 2013 Legislative Agenda for Workforce Florida***

*Motion: Dr. William "Bill" Law*  
*Second: Mr. Daniel Baldwin*

The motion passed unanimously.

### **ACTION ITEM – Approval of Local Plans**

Chairman Ingram introduced Workforce Florida Director of Strategic Planning & Organizational Excellence Mary Lazor to explain the action item. Ms. Lazor explained that the local planning process was initiated following the issuance of guidance regarding the approval of new five-year state and local workforce plans from the U.S. Department of Labor.

At its May 24, 2012, board meeting, the Workforce Florida board approved planning instructions for the submission of local workforce plans, consistent with federal guidance and the State Workforce Plan. Ms. Lazor noted that all 24 regional workforce boards have submitted their local plans, which she described as highly detailed, strategic and performance-based and which have been reviewed by the Department of Economic Opportunity. Workforce Florida staff recommends approval of the plans, which cover the years 2012 – 2017.

Additional information on this item is contained in the board book.

***Motion: To approve the local plans for all 24 regions.***

*Motion: Ms. Jennifer Grove*

*Second: Ms. Maria Rodriguez*

The motion passed unanimously.

### **ACTION ITEM – Approval of Biennial Recertification of Regional Workforce Boards**

Chairman Ingram invited Workforce Florida Director of Workforce Policy and Analysis David Cooper to explain the action item. Mr. Cooper noted federal law requires periodic recertification of the local workforce boards. Chairman Ingram thanked the regional workforce boards for their diligent efforts on board membership, noting that some boards need more time for restructuring to come into compliance with new requirements.

Additional information on this item is contained in the board book.

Board member Dr. Ed Moore asked what would happen on June 30 if a local board is still not in compliance. Mr. Cooper said the next opportunities to address the issue would be at either the May or August board meeting. Chairman Ingram said he would recommend that any remaining recertification issues be considered at the August board meeting.

***Motion: Recertify the following RWBs as the designated local workforce investment board for their respective region, as recommended by DEO:***

- RWB 1: Workforce Escarosa, Inc.*
- RWB 3: Chipola Workforce Board*
- RWB 5: Workforce Plus*
- RWB 6: North Florida Workforce Development Board*
- RWB 7: Florida Crown Workforce*
- RWB 9: FloridaWorks*
- RWB 10: CLM Workforce Connection*
- RWB 11: Workforce Development Board of Flagler and Volusia Counties*
- RWB 14: WorkNet Pinellas*
- RWB 16: Pasco-Hernando Workforce Board, Inc.*
- RWB 17: Polk Works*
- RWB 18: Suncoast Workforce*
- RWB 19: Heartland Workforce*
- RWB 20: Workforce Solutions*
- RWB 21: Workforce Alliance*
- RWB 22: Workforce One*
- RWB 24: Southwest Florida Works*

***Recertify the remaining RWBs, contingent upon submission of the required documents to DEO identifying the appropriate members, consistent with state and federal law, and recommendation by DEO for recertification by June 30, 2013. These RWBs include:***

- RWB 2: Jobs Plus*

*RWB 4: Workforce Center*  
*RWB 8: WorkSource*  
*RWB 12: Workforce Central Florida*  
*RWB 13: Brevard Workforce*  
*RWB 15: Tampa Bay WorkForce Alliance*  
*RWB 23: South Florida Workforce*

*Motion: Mr. Jim Baiardi*  
*Second: Dr. Ed Moore*

The motion passed unanimously.

## **Florida Workforce System Branding Update, Part II**

Chairman Ingram reintroduced Mr. Allen to continue the workforce system branding update. The IDEAS team noted that Florida's workforce system has tremendous potential that hasn't been realized yet, and the rebranding process will help. Mr. Allen highlighted some potential metrics that could be used to gauge success of the rebranding effort, noting IDEAS would particularly like to see more employers reporting awareness and ease of locating services. He said he would like regional workforce boards to report that rebranding had improved their position locally, and for job seekers to report better awareness and ease of locating services. Mr. Allen noted a difference between awareness and relevancy, and said the rebranding effort should also increase relevancy.

IDEAS team member Ms. Joni Newkirk briefed the board on the results of the team's consumer research, including an online survey of 593 Floridians conducted in December 2012. Key findings concluded that while more than half of respondents have name awareness, most are not knowledgeable about the state workforce system.

In terms of a timeline, Mr. Allen indicated brand architecture and market testing will take place in April and May, with final recommendations at the May board meeting. Brand standards and an implementation and outreach plan are scheduled for June.

Additional information on this item is available at Tab 1 in the February 2013 board book and on the Workforce Florida website.

Chairman Ingram thanked Mr. Allen, commenting that Workforce Florida is committed to the rebranding process and to working through implementation issues with regional workforce board partners. He introduced Workforce Florida Program Director Jayne Burgess to discuss the next action item.

## **ACTION ITEM – Career & Professional Education Industry Certification List Approval**

Ms. Burgess noted that the CAPE Industry Certification List approval process is annually presented to the board. She shared with the board that in 2007, Florida had 246 CAPE Academies. At the end of 2011, Florida had 1,729 academies. Likewise, in 2007, there were

2,044 CAPE Academy students, and now there are a projected 231,000 students in 2012. More than 48,000 certifications are anticipated for 2012. The growth in the program has clearly been significant and she credited the partnership of education and industry leaders with the workforce system, with special recognition of the team at the Labor Market Statistics Center at the Department of Economic Opportunity.

Additional information on this item is contained in the board book.

***Motion:***

- ***Approval of recommended additions to the 2012-2013 Comprehensive Industry Certification List.***
- ***Approval of modifications to the current 2012-2013 Comprehensive Industry Certification List. The modified 2012-2013 list with newly approved certifications will constitute the 2013-2014 Industry Certification List.***
- ***Authorize Workforce Florida staff, in collaboration with DEO and FLDOE staff, to make any necessary revisions to certifications on the approved Comprehensive Industry Certification List that may evolve from changes by the certifying entities relating to the release of newer versions, upgrades or other changes that may occur relating to eligibility issues of certification requirements.***

*Motion:* Mr. Richard "Ric" Shriver

*Second:* Mr. Andy Perez

The motion passed unanimously.

Ms. Burgess said the approved comprehensive list will now go to the Department of Education which uses this list to formulate its funding list, resulting in extra funding for school districts.

**ACTION ITEM – Statewide Targeted Occupations List**

Ms. Burgess said approval of the Statewide Targeted Occupations List is also an annual undertaking. The initiative falls under the direction of the Global Talent Competitiveness Council, was considered by the Council at its meeting earlier in the day, and is now presented to the full board for consideration.

Ms. Burgess mentioned Workforce Florida has an initiative underway to review the process for determining the Statewide Targeted Occupations List, which has been in place since 1998, with a goal of better capturing demand occupations and serving Floridians.

Additional information on this item is contained in the board book.

***Motion:***

- 1) *Approve WFI staff recommendation to adopt the occupational wage criteria established by the Workforce Estimating Conference at their September 7, 2012 meeting adjusted by the Florida Price Level Index for each workforce region.*
- 2) *Approve WFI staff recommendation to accept the 2013-2014 Florida Statewide Demand Occupations as presented by the Workforce Estimating Conference on September 7, 2012.*

*Motion: Mr. David Armstrong*  
*Second: Mr. Jim Baiardi*

The motion passed unanimously.

Ms. Burgess noted there is a process for regions to request additional occupations be added to their regional lists over the course of the year if needed.

#### **ACTION ITEM – Approval of Electronic Board Packet Policy**

Chairman Ingram introduced Workforce Florida Executive Vice President and CFO Scott Fennell to explain the Electronic Board Packet Policy. Mr. Fennell explained that the Workforce Florida staff prints, collates, binds and ships board meeting packets each quarter at a substantial cost, both financial and in staff time. He also noted hard-copy packets have limitations related to accessibility, search-ability and portability. The electronic board packet policy was a priority initiative of the Finance & Efficiency Council, under the leadership of Chairman Andy Perez, and was approved by the council earlier in the day. Mr. Fennell noted board members would still be able to elect to receive the board packet in hard copy if requested.

*Motion: To approve the board packet be published and distributed in a digital format.*

*Motion: Mr. Eric Kennedy*  
*Second: Dr. Linda Sparks*

The motion passed unanimously.

Vice Chairman Grove noted the conversion to an electronic format would make it that much more important for board members to go through the packet in advance to review the material, make notes and get questions in to staff.

Mr. Al Stimac requested the electronic packet be placed in a tab format, and Chairman Ingram noted that it was formatted with tabs. Ms. Mary Lou Brunell remarked that accessibility is also related to what kind of electronic reader one is using.

#### **ACTION ITEM – Approval of Contract under Workforce Florida Contracting Policy**

Chairman Ingram introduced Workforce Florida General Counsel Jay Barber to present the item. Mr. Barber noted the proposed \$243,264 contract with Power Design, Inc. is for Quick Response



Training, with St. Petersburg College, of which board member Dr. Bill Law is president, as administrator of the contract. St. Petersburg College could receive up to \$11,584 in administrative costs associated with the contract. Workforce Florida contracting policy requires approval by a 2/3 vote of the board once a quorum is established.

Additional information on this item is contained in the board book.

Dr. Law noted he was abstaining from the vote.

***Motion: To approve the above-listed contract by a 2/3 vote when a quorum is present.***

*Motion: Mr. Andy Perez*

*Second: Mr. Al Stimac*

The motion passed unanimously.

### **Finance & Efficiency Council**

Chairman Ingram recognized Chairman Andy Perez to provide the report from the Finance & Efficiency Council. Chairman Perez noted the council's only action item was the recommendation of the electronic board packet policy, and he concurred with Vice Chairman Grove's statement that board members would need to take additional responsibility for reviewing materials ahead of time.

Mr. Perez also mentioned the value of the five presentations during the council meeting. He appreciated the progress being made on a standardized regional provider contract, which should provide improved efficiency and cost-effectiveness. He noted the council's appreciation of the presentation and discussion on E-Learning, and the importance of the growing popularity and use of E-Learning. A third presentation was on a new, open-source software program for web development by Drupal Easy, a company that used a National Emergency Grant for displaced Space Coast workers to grow and expand.

Chairman Perez thanked Mr. Tom Clendenning from DEO for his presentation of the Re-Employment Assistance Integration with the Employ Florida Marketplace, noting that Mr. Clendenning did an excellent job of explaining the history of the project and work that had taken place. He also expressed his appreciation to Region 12 Executive Director Pam Nabors and the team at DEO for the progress and audit update on the region, which he noted has made extraordinary progress under her leadership.

In closing, he suggested that the regional workforce boards should consider doing what he called a "stress test" of their current budgets, so that in the event a budget reduction occurred, they might have contingency plans in place.

### **Performance Council**

Chairman Ingram recognized Chairman Britt Sikes to provide the report from the Performance Council. Chairman Sikes remarked that the workforce system has many stakeholders, which is underscored by the many partners represented during presentations at board and council meetings. The council received an update on the Florida Workforce Scorecard from the Florida Chamber Foundation, an update on DEO's Florida Workforce Integrated Performance Reporting System, which will go live in April, and a performance update by the DEO team on the U.S. Department of Labor's Common Measures.

He noted that Florida does exceedingly well on these measures, but rather than staying with the status quo, at the Governor's urging, the workforce system raised its own standards which further positioned Florida as a national leader. He also noted his appreciation of the presentation on labor supply and demand by Labor Market Statistics Center Director Rebecca Rust.

Chairman Sikes said the council had talked about its goals for the year. He noted Chairman Ingram's request that board members visit at least one region before the May board meeting, and said his council had decided they are going to visit one region each quarter, varying the visits between rural and urban areas. He said his council is also interested in developing a measurement of how the system is helping job seekers remain and advance in the workforce. He closed by expressing his appreciation and the appreciation of his council for President Hart's leadership throughout his tenure with Workforce Florida.

### **Global Talent Competiveness Council**

Chairman Ingram recognized Chairman Ric Shriver to provide the report from the Global Talent Competitiveness Council. Mr. Shriver expressed his council's desire to move from a Talent Supply Chain to a Talent Supply System as both Chairman Ingram and President Hart had expressed. He noted the importance of having the right participants in the discussion so that the council can make the best decisions on how to use information and get the best return on investments.

He said as the board knows, Workforce Florida is in its third year of Targeted Industry Cluster Task Forces, and a new task force focused on Information Technology had just launched. He introduced Mr. David Pryor and Mr. Greg Fountain from the task force. He said the targeted industry cluster task force groups are key to having the right people in the discussion in Workforce Florida's collaborative efforts with education and business partners for the right training at the right time, producing the right results.

Chairman Ingram thanked the council chairmen for the excellent work that they and their councils are doing.

### **President's Report**

Chairman Ingram introduced President Hart to provide the President's Report.

President Hart asked the Workforce Florida team in attendance to stand up, and asked for a round of applause for their efforts to continually improve and enhance the quarterly board meetings and board experience.

In presenting his Indicators-At-A-Glance report, President Hart noted this board is singularly focused on performance, and he remarked on some updates to the Indicators report that had been made since the last meeting at the suggestions of various board members. He suggested board members read the Questions and Answers sheet that is included in this month's report.

President Hart provided a high-level summary of the report, which he said consistently demonstrates positive performance by the state workforce system. He noted the Statewide Common Measurers chart shows in every category but Wagner-Peyser, in which Florida is in renegotiation with the federal government, that our system is above the federal standard, and in three, the system is also outperforming its state stretch goals.

Chairman Ingram thanked President Hart, also noting his exceptional leadership over the past five years and asking for a round of applause.

### **Regional Workforce Board Reports**

Florida Workforce Chairs' Alliance Chair Lenné Nicklaus-Ball passed on her report, as the board had participated in the FWCA meeting that preceded their quarterly meeting.

Florida Workforce Development Association President Richard Williams expressed appreciation to President Hart for inviting him to present from the regional workforce board perspective to the House Economic Development and Tourism Subcommittee. He mentioned challenges that the boards are having in implementing the new requirements for local board membership due to rules that can make some boards out of compliance if a member resigns. He thanked President Hart for his help with new goals for job placements and his willingness to listen to suggestions from the regions.

He mentioned some of the regions' concerns with impacts from sequestration on local employers. Mr. Williams closed by reminding board members that they have the opportunity to make a major impact on the future of the system with the renegotiation of the Employ Florida Marketplace contract. He asked the board to stay engaged with the process. He asked the board and partners in the room to consider whether they personally had used the Employ Florida Marketplace for their last job search. He also asked them to check to see whether their human resources departments were using Employ Florida. Mr. Williams said for the system to succeed, it is critical to have high-level jobs and high-level talent in the system.

Chairman Ingram thanked Mr. Williams for his report. He asked board members to mark December 2 – 6, 2013, on their calendars, which are the dates for the annual Workforce Professionals Summit. He thanked Mr. Andy Mayer and Mr. Ilke Heperler from Federated Precision, a QRT recipient, for attending the board meeting and participating in the Governor's Reception.

With no new business or public comment, Chairman Ingram thanked hosts, sponsors and Workforce Florida staff.

The meeting adjourned at approximately 3:03 p.m.

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**Board Secretary Certification**

In accordance with Article VII, Section 7.3, I hereby certify that this summary reflects the proceedings by the Board of Directors of Workforce Florida, Inc., has been reviewed by the board, and approved or approved with modifications which have been incorporated herein.

\_\_\_\_\_  
Chris Hart IV  
Board Secretary

\_\_\_\_\_  
Date

**DRAFT MINUTES  
OF THE WORKFORCE FLORIDA INC.  
BOARD OF DIRECTORS  
EXECUTIVE COMMITTEE MEETING  
April 17, 2013**

**Call to Order**

Board Chairman Dwayne Ingram called the meeting of the Workforce Florida Executive Committee to order at approximately 10:05 a.m. ET on April 17, 2013, by welcoming all to the meeting.

**Roll Call/Quorum**

A quorum was present with the following Executive Committee members in attendance:

|                              |                 |
|------------------------------|-----------------|
| Chairman Dwayne Ingram       | Mr. Kevin Doyle |
| Vice Chairman Jennifer Grove | Mr. Ric Shriver |
| Ms. Mary Lou Brunell         | Mr. Britt Sikes |

**Welcome & Chairman's Remarks**

Chairman Ingram announced that President/CEO Chris Hart IV has agreed to continue to lead Workforce Florida through the end of 2014. Chairman Ingram said he is extremely pleased with President Hart's decision and it helps ensure continuity through the many initiatives the board has underway. President Hart said after much thoughtful consideration, he is very excited to remain in his position. He said he has renewed energy and enthusiasm for his role and is eager to move forward with the many projects at hand. Chairman Ingram thanked President Hart for his continued commitment and dedication. Members of the Executive Committee echoed the Chairman's comments. Chairman Ingram thanked members of the search committee for their efforts and said it would pick back up again in 2014 at the appropriate time.

Chairman Ingram said he is pleased to announce that he and his wife Bonnie will be hosting the May Board Reception at their home. He said the May board meeting will be exciting.

He expressed his appreciation to the many Executive Committee members who have taken on the Chairman's Challenge to have at least one in-person visit to a regional workforce board prior to the board meeting. He also thanked the newest Workforce Florida sponsors, Kevin Doyle and Wexford Strategies, Avaya and Sirata Beach Resort & Conference Center.

**Special Council**

Mr. Ben Grzesik thanked President Hart for his decision to stay on and thanked Workforce Florida staff for hospitality and assistance during several visits to the office to work on the new Special Council. He particularly noted assistance from Workforce Florida General Counsel Jay Barber, Executive Vice President & CFO Scott Fennell and Director of Strategic Planning &

Organizational Excellence Mary Lazor. He discussed his enthusiasm for Chairman Ingram's vision for the council as a small committee within Workforce Florida's corporate structure, to be closely associated with Workforce Florida's mission but also in both appearance and governance be independent of the Workforce Florida structure. The purpose is to generate non-federal and non-state funds through donations, investments and fees, which will be invested to further the Workforce Florida mission and improve Florida's workforce.

Mr. Grzesik noted the importance of due diligence at the onset of the project. He said he attended the National Association of Workforce Boards conference in Washington, DC, which coincided with an unrelated visit, and attended presentations from Pennsylvania and Michigan, both of which are raising private funds for public workforce activities. He contacted the presenter from Michigan, who was very receptive and pleased to discuss his efforts in a conference call with his Chief Operating Officer, his Chief Financial Officer, Mr. Fennell, Mr. Barber and Mr. Grzesik. Chairman Grzesik said the call was very informative and the group extended an offer to continue to be a resource for Workforce Florida. Additional conference calls, including one with a local consultant, have yielded additional information related to setting up a foundation, including the importance of a strategic plan.

Mr. Grzesik mentioned that the Special Council's remaining members shall be non-board members. Additional members currently consist of Vice Chairman Leslie Ingram and Ms. Angie Metcalf, Chair of Workforce Solutions in Region 20.

### **Sequestration**

Mr. Fennell noted federal sequestration will result in \$85 million in largely across-the-board spending reductions. For the workforce system, sequestration affects the Workforce Investment Act and Wagner-Peyser funds. He noted the U.S. Department of Labor will take the reduction from the first quarter of the coming fiscal year which runs from July 1 – September 30, 2013. Funding this coming year will also be reduced due to the improving unemployment rate.

Mr. Fennell said state-level funding remains at 5 percent in the federal budget proposal.

He said if estimates are correct, reductions of 11.5 percent, or \$21.2 million, are expected in Workforce Investment Act dollars, 5 percent of which is due to sequestration and 6.5 percent of which is due to reductions in unemployment levels. Additionally, reductions in Wagner-Peyser funds are estimated at 5.53 percent, with 5 percent due to sequestration.

Workforce Escarosa Executive Director Susan Nelms noted additional funding reductions based on U.S. Census data will cost her board \$370,000 in youth funds. She said South Florida Workforce lost \$2 million in youth funds.

### **Branding Update**

Vice President of External Affairs & Board Relations Adriane Glenn Grant said there is now an advisory panel in place for the rebranding initiative, which includes chief executives, communications directors and business liaisons from regional workforce boards. She said two

meetings have been held to date. The following day, a briefing teleconference/webinar is scheduled for all workforce system partners. The primary purpose of the upcoming call is to share new research into how the employer community perceives the workforce system, the results of which dovetail with previous research into job seekers' and workers' perceptions.

Ms. Grant said the research into employers' perspectives provides confirmation and affirmation that this rebranding effort is going in the right direction, as the system is largely unknown to the business community. She said these results provide great opportunities for improvements and enhancements. She said the advisory panel and an internal team have been working with the consulting firm, IDEAS of Orlando, to develop the Branding Charter as part of the May board recommendations.

She said potential brand names and concepts that respond to the clear indications being received from the market calling for a streamlined identity for the state workforce system are being shared with regional partners. She said market testing on top choices will begin this week. She thanked the advisory panel and several workforce system leaders who continue to give much of their time and input to the effort – Rick Beasley, Rick Fraser, Pam Nabors, Kim Tesch-Vaught, Lois Scott, Laura Byrnes, Tom Veenstra, Candace Moody, Judy Blanchard and Kenny Griffin.

### **Legislative Update**

Workforce Florida Director of Operational Support April Money provided a federal and state overview. She said the Quick Response Training Program is currently funded at \$12 million in the Florida House and \$6 million in the Florida Senate. She said there is a Temporary Assistance to Needy Families budget reduction of \$15 million proposed in the Senate budget but no reduction in the proposed House budget, and some proviso language in the Senate includes \$750,000 for the Homebuilders Institute with those funds coming directly from Workforce Florida state set-aside funding. She said there is full funding proposed for Workforce Florida's operations in both the Senate and House budgets.

She said Workforce Florida is tracking several bills related to education and workforce, with more details available in the weekly legislative updates being sent out via email.

President Obama's budget proposal for 2014 includes an increase in Workforce Investment Act funds and the creation of a \$4 billion universal displaced workers' program by consolidating some workforce funding sources. The budget would also allow governors to reserve 7.5 percent of statewide funds, which would be an increase. The Workforce Investment Act currently allows a 15 percent set-aside, but recent congressional appropriations have reduced the state set-aside to 5 percent for the last few years.

### **May Board Meeting**

Workforce Florida Board Relations Director Victoria Langley Heller provided an overview of the three-day series of meetings coming up in connection with May's quarterly board meeting. She also mentioned that May's will be the first meeting for which board members will receive their board books electronically rather than in hard copy in keeping with the new policy to



promote efficiency and cost-effectiveness. She added that hard copies will be available if requested. She said the Workforce Florida team hopes the electronic board books will be more convenient for members and encouraged the Executive Committee to download the board books and save them on whatever device they will be bringing to the meeting, as there will not be wireless internet widely available in the meeting room.

### **Business Liaisons Meeting**

Senior Vice President of Global Talent Innovation Andra Cornelius provided the Executive Committee with information about the upcoming April 30 – May 1, 2013, Statewide Business Liaisons Workshop in Sebring. She said the purpose of this year's workshop is to highlight employer engagement strategies among the workforce professionals in all 24 regional workforce boards.

Ms. Cornelius noted that, consistent with information from the Employer Penetration Report and research from the statewide rebranding initiative, the workforce system must increase employers' use of its resources. She thanked Chairman Ingram and Florida Workforce Chairs' Alliance Chair Lenné Nicklaus-Ball for identifying enhancing business engagement as a top-line goal. She noted that attendees at last year's Workforce Summit also identified increasing business engagement as their top training priority. She said host region Heartland Workforce and President & CEO Roger Hood have done a tremendous job, including lining up several sponsors. Both Mr. Hood and Sebring Mayor George Hensley will provide the official welcome at the workshop. Ms. Cornelius also provided an overview of the agenda.

She thanked regional workforce board leaders and the Department of Economic Opportunity for support and assistance.

Ms. Cornelius also noted the development this spring of Workforce Florida's Invitation to Negotiate to create a business engagement process to serve as a playbook for workforce professionals working with the business community. She said the resulting playbook must sharpen consistency and focus in four key areas: value and strategy, partnership and collaboration, program and system capacity building, and performance and results. TWSquared was chosen from nine respondents. She thanked the selection committee for its assistance.

### **Closing Remarks**

In closing, Chairman Ingram thanked Workforce Florida staff for ongoing efforts. He asked Executive Committee members to make plans for a workday at a regional board in support of his Chairman's Challenge. He thanked the participants and partners and adjourned the meeting at 10:57 a.m.

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**Board Secretary Certification**

In accordance with Article VII, Section 7.3, I hereby certify that these minutes reflect the proceedings by the Board of Directors of Workforce Florida, Inc., have been reviewed by the Board, and approved or approved with modifications which have been incorporated herein.

\_\_\_\_\_  
Chris Hart IV  
Board Secretary

\_\_\_\_\_  
Date

# Consent Item

## APPROVAL OF WORKFORCE FLORIDA INC. WAIVER REVIEW COMMITTEE RECOMMENDATION REGARDING WAIVERS FROM THE INDIVIDUAL TRAINING ACCOUNT RESERVE REQUIREMENT FOR REGIONS 4, 10 & 13

\*\*\*\*\*

### **Background:**

Since 2000, Florida Law [s. 445.003(3)(a)1., F.S.] has required:

*At least 50 percent of the Title I funds for Adults and Dislocated Workers that are passed through to regional workforce boards shall be allocated to Individual Training Accounts unless a regional workforce board obtains a waiver from Workforce Florida, Inc. Tuition and fees qualify as an Individual Training Account expenditures, as do other programs developed by regional workforce boards in compliance with policies of Workforce Florida, Inc.*

The statute was interpreted to authorize expenditures for the various core, intensive and supportive services related to training programs. This allowed the remaining non-reserved funds be used for other non-training related services and initiatives.

Ch. 2012-29, L.O.F., amended s. 445.003(3)(a)1., F.S., to reduce Individual Training Account (ITA) expenditures to only include tuition, books and fees of training providers and “other training services” prescribed and authorized by the Workforce Investment Act. Expenditures related to core and intensive services, and supportive services, are not authorized from the ITA reserve. Funding for these expenditures must come from other Regional Workforce Board (region, or regional board) resources. This amendment to the law did not change the ITA reserve requirement and the authority of Workforce Florida, Inc. (WFI, or the Board) to grant a waiver from the requirement.

To comply with this requirement, and align with the qualified expenditures approved by the Board, the regional boards are required to report their ITA expenditures in all of the following five categories:

- Occupational Skills Training, pursuant to P.L. 105-220, s. 134(d)(4)(D)(i), which includes classroom training through eligible providers.
- Other WIA Training Services & Activities, pursuant to P.L. 105-220, s. 134(d)(4)(D)(ii)-(ix), which includes training activities through eligible providers or employers in the following categories:
  - (ii) on-the-job training;
  - (iii) programs that combine workplace training with related instruction, which may include cooperative education programs;
  - (iv) training programs operated by the private sector;
  - (v) skill upgrading and retraining;

- (vi) entrepreneurial training;
  - (vii) job readiness training;
  - (viii) adult education and literacy activities provided in combination with services described in any of clauses (i) through (vii); and
  - (ix) customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.
- Work Experience and Internships, which includes subsidized employment and other employer provided training activities.
  - Training Program Management, which includes staff costs directly related to developing, implementing, or coordinating training programs for clients participating in Occupational Skills Training, Other WIA Training Services & Activities, Work Experience & Internships. It also includes training programs leveraged through other grants. These “staff costs” include only salaries and benefits.
  - Training Case Management, which includes case management and job placement services for clients in training (not clients seeking training). “Staff costs” include only salaries and benefits.

The first three categories show ITA expenditures for services through eligible providers or employers, while the last two categories show the qualified “in-house” staff costs related to the first three categories.

Regional boards are required to maintain records sufficient to substantiate what is reported and to facilitate DEO’s validation of such compliance. Regional boards are required to identify and report expenditures in all five categories, which will provide a more complete understanding of total costs related to training activities and support future policy debates related to regional training costs.

DEO is required to compile quarterly reports of training expenditure data submitted by the regional boards through One-Stop Management Information System (OSMIS), and to annually validate the accuracy of submissions. This information will be used to measure compliance with the ITA reserve requirement and to evaluate a regional board’s request for wavier from this requirement.

### **Waivers from the ITA Reserve Requirement**

Ch. 2012-29, L.O.F., preserved the option for the Board to grant a waiver from the ITA reserve requirement. However, the law does not specify criteria for granting this waiver. On May 24, 2012 the Board adopted the following waiver criteria to provide the regional boards with uniform guidance in their applications, and to guide the Board in making an informed, consistent and objective response.

#### **Waiver Criteria**

For the Board to consider a waiver from the ITA reserve requirement, and to guide the Board in its review, the requesting regional board must submit to the Board:

- A waiver identifying the requested reduction from the statutorily required ITA reserve, specifying the percentage (between 0 and 49%) of Title I funds for Adults and Dislocated Workers that the regional board proposes to reserve for the required training services. This request must include supporting data, to show:

1. How the reserved training funds will be spent for ITAs and each of the other authorized training services; and
  2. How the redirected training funds will be spent for other services.
- Documentation that substantiates any of the following:
    1. The lack of demand for each of the authorized training services;
    2. The substantially greater demand for core, intensive and supportive services, and business services, relative to training services;
    3. The qualitative and quantitative financial impact that the statutorily required ITA reserve requirement has on the provision of services for clients seeking or receiving training services; or
    4. The exceptional circumstances that warrant granting of a waiver; factors to consider may include:
      - The regional board is contractually obligated or is seeking participation in a training program funded by a partner, for which the regional board will be providing Core and Intensive Services;
      - The regional board is contractually obligated or is seeking participation in a major economic development initiative of regional impact, that will result in significant job creation, to the extent the initiative does not interfere with the priority of services to other clients, as required by federal law; and
      - The regional board is entirely contained within a statutorily designated Rural Area of Critical Economic Concern (RACEC).
  - A budget (or proposed budget) showing program components and major breakouts for each program (one-stop services, training providers, administrative costs, etc).
  - Identify how the current and long-term unemployment rate for the region will be impacted by a waiver, should it be approved.
  - Documents that identify the regional board's efforts to increase demand from individuals to meet market needs (to address the "talent gap"); and
  - Documentation that the regional board and the Chief Elected Official have approved the waiver request.
  - An agreement that if the conditions warranting the waiver change, the regional board commits to comply with the ITA reserve requirement and will notify WFI of such compliance.

In addition, any waiver is limited to one year.

### **Waiver Review Committee**

On May 24, 2011 the Board authorized the Executive Committee of the Board to appoint a select committee (the Waiver Review Committee, or Committee) of three Board members to timely receive and review waiver requests, and recommend specific actions to the full board for consideration, to be approved by consent. The Board also authorized the appointment of Alternate Members to serve in the event any of the three members are unable to participate at any time. Committee members include Ric Shriver (chair), Ben Grzesik, and Alex Moseley. Alternate members are Al Stimac, George Hauer, Eric Kennedy and Andy Perez.

To implement this action of the Board, the following process was put in operation:

- Submission by a region to the Committee of an application for waiver from the ITA Reserve requirement;
- Review for completeness by WFI staff, and forwarding of materials to each member of the Committee;
- Preliminary review of the application by the Committee;
- If necessary, request from the members of the Committee for clarification of submitted material or request for additional information;
- Scheduling of a presentation, in person, before the Committee by the Executive Director of the requesting region; and
- Consideration of the application for waiver and recommendation by the Committee to the Board.

In June and July 2012, and January 2013, the Waiver Review Committee met to consider waiver requests from six regions, and the WFI Board of Directors met to consider the committee's recommendations. The committee recommended and the WFI BOD approved waivers at the following level:

- For Region 1, an ITA reserve requirement of 40 percent (as requested);
- For Region 2, an ITA reserve requirement of 37.5 percent (requested: 35 percent);
- For Region 3, an ITA reserve requirement of 15 percent (requested: 10 percent);
- For Region 6, an ITA reserve requirement of 25 percent (as requested);
- For Region 7, an ITA reserve requirement of 25 percent (requested: 20 percent); and
- For Region 13, an ITA reserve requirement of 40 percent (as requested).

On April 4, 2013 the Committee considered applications from Regions 4 (Gulf Coast Workforce Board, Inc.), Region 10 (CLM Workforce Connection) and an amended application from Region 13 (Brevard Workforce Development Board) for waivers at the following levels:

- 40 percent for Region 4;
- 25 percent for Region 10; and
- 30 percent for Region 13.

After considering the applications and presentations by regional staff, the Committee recommended the Board approve the three waivers from the ITA reserve requirement at the requested levels.

The applications may be found on the WFI website at:

<http://www.workforceflorida.com/Calendar/calendar2013.php> (see April Waiver Review Committee Meeting Notice and Materials)

## REGION 4 WAIVER SUMMARY

| <b>Total Est.<br/>Budget</b> | <b>Total<br/>A&amp;DW\$</b> | <b>Required<br/>ITA@50%</b> | <b>Requested<br/>ITA@40%</b> | <b>Redirected<br/>ITA @\$40%</b> | <b>WRC Rec:<br/>ITA@40%</b> |
|------------------------------|-----------------------------|-----------------------------|------------------------------|----------------------------------|-----------------------------|
| \$ 6.37m                     | \$ 1,800,326                | \$ 900,163                  | \$ 720,130                   | \$ 180,033                       | \$ 180,033                  |

This summary was compiled from information contained in the waiver application and information obtained through conversations with RWB staff.

Region 4 requests a reduction of the ITA reserve requirement, from 50% to 40%, for these reasons:

- The budget adopted in July aspired to expand qualified training services from the previous year to comply with the change in the law;
- Despite expanded outreach efforts, there was a slight decrease in demand from the previous year for training programs other than welding, and an increase in demand for One-Stop Services;
- The inability to use unspent ITA reserve funds will result in reductions in workforce center services, staff, purchasing and maintenance efforts; and
- The ability to use unspent ITA reserve funds will allow the region to maintain current commitments and expand One-Stop services to meet service demands.

Region 4 reported that it would use the **redirected** ITA funds to:

- Maintain current funding of One-Stop costs for personnel and facilities; and
- Hire two additional positions at the One-Stop Career Center.

Region 4 submitted information identifying:

- Outreach efforts to increase the demand for training services;
- The contractual obligation to provide core and intensive services for TAA Consortium grant for advanced manufacturing training awarded to 12 community colleges;
- That two of the 3 counties in Region 4 are in a RACEC (Rural Area of Critical Economic Concern);
- Partnerships in initiatives to bridge the skills gap in the region; and
- The rate of services to employers, job seekers, and Dislocated Worker Clients exceed that from the previous year, while the rate of ITAs (and classroom training as a subgroup) is lower.



## REGION 10 WAIVER SUMMARY

| Total Est.<br>Budget | Total<br>A&DW\$ | Required<br>ITA@50% | Requested<br>ITA@25% | Redirected<br>ITA @\$@25% | WRC Rec:<br>ITA@25% |
|----------------------|-----------------|---------------------|----------------------|---------------------------|---------------------|
| \$ 10.3m             | \$ 5,598,505    | \$ 2,799,252        | \$ 1,399,626         | \$ 1,399,626              | \$ 1,399,646        |

Region 10 requested a reduction of the ITA reserve requirement, from 50% to 25%, necessitated by:

- A decrease in demand for ITAs, to include Employed Worker Training, On-the-Job Training, and Internships;
- An increase in demand by businesses for applicant screening and assessment services;
- An increased need for training support services;
- A decrease in placements for customers receiving training services, Q 1&2 FY 2012/13; and
- A surplus of carry-forward Adult & Dislocated Worker funds, due to availability of special training grants over the past few years.

Region 10 reported that it would continue to use the reserved ITA funds **at the requested level** for Occupational Skills training, EWT, OJT, and Internships.

Region 10 reported that it would use the **redirected** ITA funds for:

- Increased outreach to small and medium-size businesses;
- Increased applicant screening and assessment for businesses;
- Additional staff to manage job orders and provide soft-skills training – however, hiring will not be pursued until sequestration issue resolved; and
- Additional customer workshops to address soft and hard skills gaps.

Region 10 submitted information substantiating:

- The decrease in EWT, OJT and Internship enrollments, due to decrease in business demand;
- The increase in core and intensive services delivered since 2010;
- The increase in job orders since 7/11;
- As evidenced by a recently commissioned Skills Gap study, “soft skills” were the primary skills in demand from area employers – soft skill training is an “intensive” service, ineligible for ITA funds;
- Expanded marketing of ITAs by RWB to clients;
- Expanded outreach to training providers and business associations;
- An increase in ITA cap for select training programs through private providers; and
- An increase in EWT training reimbursement.

## *Amended* REGION 13 WAIVER SUMMARY 4/4/13

*(Amended provisions in italics)*

| <b>Total Est. Budget</b> | <b>Total A&amp;DW\$</b> | <b>Required ITA@50%</b> | <b>Requested ITA@30%</b> | <b>Redirected ITA @\$30%</b> | <b>WRC Rec: ITA@30%</b> |
|--------------------------|-------------------------|-------------------------|--------------------------|------------------------------|-------------------------|
| \$ 20.1 m                | \$ 4,736,932            | \$ 2,368,466            | \$ 1,421,079             | \$ 947,387                   | \$ 947,387              |

|                           |  |          |          |  |  |
|---------------------------|--|----------|----------|--|--|
| Est. Staff Reduction      |  | (9)      | + ?      |  |  |
| Training Support Services |  | \$20,000 | \$50,500 |  |  |

On July 31, 2012, the Workforce Florida Board of Directors approved a waiver from the ITA reserve requirement for Region 13.

*In March 2013, Region 13 requested an additional reduction of the ITA reserve requirement, from 40% to 30%, necessitated by*

- *The receipt of additional Dislocated Worker funding, which had a corresponding increase in the ITA reserve;*
- *Unexpended NEG training grant funds (\$2.7m of \$15m, 3 year grant) for transitioning aerospace workers;*
- *Additional Space Florida training grant of \$1.4m for transitioning aerospace workers; and*
- *The need for funding of training supportive services to supplement all training programs.*

Region 13 reported that it would use the reserved ITA funds, at the **requested level**, for:

- Employed Worker Training;
- OJT;
- Skills Upgrade/Retraining; and
- Entrepreneurial Work Experience & Adult Work Experience.

Region 13 reported that it will use the **redirected** ITA funds to pay for One-Stop costs, to include the retention of 9 FTEs, *addition of additional FTEs—though not at this time – and an increase in training supportive services.*

Region 13 submitted information describing the

- Historical Lack of Demand for Training
  - During FY 2011/12, R 13 served 56,109 customers. Of that number, 4,234 were referred to WIA (11%). Only 472 of those attended WIA orientation, and 211 applied for, were accepted and approved for WIA training; and
  - The TOL for 2012/13 lists over 1250 annual openings in 68 targeted occupations in Region 13.
- Substantially greater demand for core, intensive and business services, and especially training supportive services, to include:
  - In FY 2011/12, R 13 provided over 57,242 services to 2,270 employers; and
  - WIA funds used to fund Wagner-Peyser services.
- Financial impact of this newly required redirection of resources, to include reduction in staff of 9 (out of 132) FTEs, and reduction of supportive services (gas cards – 67%; child care – 53%).

\*\*\*\*\*

## **NEEDED ACTION**

**Adopt the recommendation of the Workforce Florida Waiver Review Committee regarding waivers from the ITA reserve requirement for Regions 4, 10 and 13 (amended).**

**These recommendations are:**

- **For Region 4, an ITA reserve requirement of 40 percent;**
- **For Region 10, an ITA reserve requirement of 25 percent; and**
- **For Region 13, an ITA reserve requirement of 30 percent (amended from previously approved 40 percent).**

**DRAFT SUMMARY OF THE WORKFORCE FLORIDA INC.  
WAIVER REVIEW COMMITTEE  
APRIL 4, 2013**

**Call to Order and Members Present**

Chairman Ric Shriver called the meeting of Waiver Review Committee to order at 2:00 p.m. ET on April 4, 2013, and recognized the other two members of the committee who were present: Alex Moseley (via conference call) and Ben Grzesik.

**Welcome and Presentations**

Chairman Shriver opened the meeting by welcoming attendees, noting that this process of considering Regional Workforce Board (RWB) requests to waive the statutory 50-percent Individual Training Account (ITA) reserve requirement, as defined in s. 445.003(3)(a)1., F.S., was helping the committee members better understand the regions' roles and responsibilities.

Chairman Shriver then recognized (via conference call) Lisa Rice, Executive Director for the Brevard County Workforce Development Board (RWB 13), to summarize her region's application for an amended waiver of the statutory 50-percent ITA reserve requirement. Ms. Rice provided a summary of the information, and requested a reduction from the 40-percent reserve requirement approved on July 31, 2012 to 30 percent for RWB 13. (Application provided.)

After follow-up questions, committee member Mr. Grzesik made the motion to approve the requested reduction from the statutory ITA reserve requirement, from 40 percent (previously approved) to 30 percent, for RWB 13. Mr. Moseley seconded the motion, which passed unanimously.

Chairman Shriver then recognized (via conference call) Kim Bodine, Executive Director for Gulf Coast Workforce Board Inc. (RWB 4), to summarize her region's application for a waiver of the statutory 50-percent ITA reserve requirement. Ms. Bodine provided a summary of the information, and requested a reduction from the 50-percent reserve requirement to 40 percent for RWB 4. (Application provided.)

After follow-up questions, committee member Mr. Grzesik made the motion to approve the requested reduction from the statutory ITA reserve requirement, from 50 percent to 40 percent, for RWB 4. Mr. Moseley seconded the motion, which passed unanimously.

Chairman Shriver then recognized Rusty Skinner, Executive Director for CLM Workforce Connection (RWB 10), to summarize his region's application for a waiver of the statutory 50-percent ITA reserve requirement. Mr. Skinner provided a summary of the information, and requested a reduction from the 50-percent reserve requirement to 25 percent for RWB 10. (Application provided.)

After follow-up questions, committee member Mr. Moseley made the motion to approve the requested reduction from the statutorily ITA reserve requirement, from 50 percent to 25 percent, for RWB 10. Mr. Grzesik seconded the motion, which passed unanimously.

Mr. Shriver noted the committee's recommendations would be forwarded to the full Workforce Florida board for their consideration on May 22, 2013.

Chairman Shriver thanked the Committee, the Workforce Florida staff, Ms. Rice, Ms. Bodine and Mr. Skinner for their contributions and participation. The meeting adjourned at approximately 3:00 p.m.

# Consent Item

## **POLK WORKS REQUEST FOR DESIGNATION AS A DIRECT PROVIDER OF WIA YOUTH SERVICES**

\* \* \* \* \*

Section 445.007(6), Florida Statutes, states that a regional workforce board may be designated as a one-stop operator and direct provider of intake, assessment, eligibility determinations, or other direct provider services except training services. Further, it states that Workforce Florida, Inc., shall establish procedures by which a regional workforce board may request permission to operate under this section and the criteria under which such permission may be granted. The criteria shall include, but need not be limited to, a reduction in the cost of providing the permitted services. Such permission shall be granted for a period not to exceed 3 years for any single request submitted by the regional workforce board.

Polk Works has requested designation beginning July 1, 2013, to directly provide Workforce Investment Act (WIA) Youth services through staff located in Youth sites throughout Polk. Polk Works has contracted out its Youth Services Program for nearly 10 years. As mandated by law, these services must be competitively procured every three years. Their current provider contract ends June 30, 2013. In accordance with policies and procedures, this is the year that Polk Works would issue a Request for Proposals. This request is to allow Polk Works to seek the approval of Workforce Florida to bring services in-house for a one year period (trial basis) instead of issuing an RFP this year.

\* \* \* \* \*

### **NEEDED ACTION**

**To approve the request by Polk Works for designation as a direct provider of WIA Youth services for a one-year period beginning July 1, 2013 through June 30, 2014.**

# Action Item

## APPROVAL OF FUNDING ALLOCATIONS

\*\*\*\*\*

Meeting materials for this Action Item can be found with the Finance & Efficiency Council materials, Action Item 1. You can scroll to that section or [click here](#) to advance automatically.

# Action Item

## STATEWIDE TARGETED OCCUPATIONS LIST ANNUAL APPROVAL PROCESS

\* \* \* \* \*

On an annual basis, Workforce Florida (WFI) is responsible for establishing Regional Targeted Occupations Lists (TOLs). Once developed and approved, these TOLs govern the provision of training programs being offered to individuals needing training assistance within the workforce system in compliance with federal and state law.

This initiative falls under the direction of the Global Talent Competitiveness Council and was considered by the Council at its meeting May 15, 2013. It is now being presented to the Workforce Florida Board of Directors for final consideration/approval.

### **Background:**

At the Board of Directors meeting in Tallahassee in February, the WFI Board approved the adoption of the following criteria and the Workforce Estimating Conference's 2012-2013 Florida Statewide Demand Occupations List.

- 150 annual openings and average growth rate of 1.55% or 360 annual openings with any positive growth
- Mean Wage of \$13.29/hour and Entry Wage of \$10.80/hour
- High Skill/High Wage (HSHW) Occupations:  
Mean Wage of \$20.82/hour and Entry Wage of \$13.29/hour
- Florida Department of Education (FLDOE) Training Codes of 3 [Postsecondary Adult Vocational (PSAV) Certificate] and 4 [Community College Credit/Degree]. The occupation requires postsecondary adult vocational training or a community college credit certificate, applied technology diploma, associate of applied science degree or associate degree.

Using the approved Statewide Demand Occupations List, the Labor Market Statistics (LMS) Bureau at the Department of Economic Opportunity developed individual regional lists using the Florida Price Level Index. Through an on-line web application, regional boards had an opportunity to review the occupations and submit requests for additions to their individual regional lists. Additionally, regions submitted supplemental occupations requests directly to Workforce Florida for inclusion on their regional TOLs. These supplemental requests included justifications specific to their region to substantiate their need for these occupations to be added to their regional lists. Upon closure of the on-line submission period, LMS compiled all requests and presented their analysis to WFI.



WFI has reviewed and analyzed all requests and is recommending the following actions relating to the 2013-2014 Targeted Occupations List:

- 1) WFI staff recommends adoption of all approved requests for additions to the regional targeted occupations lists for 2013-2014 as listed on Attachment A.
- 2) WFI recommends that occupations requiring training below or degrees beyond PSAV and/or the Community College level not be approved as criteria approved by WFI does not allow for training less than or greater than PSAV or Community College levels as listed on Attachment A.
- 3) WFI staff recommends approval of delegation of authority to WFI's President, or his designee, to formally approve/disapprove additions to regional targeted occupations lists during the course of the fiscal year as recommended by staff based on research and analysis by WFI and DEO staff using current labor market information.

### **NEEDED ACTION**

- 1) Adopt staff recommendation of all approved requests for additions to the regional targeted occupations lists for 2013-2014 as listed on Attachment A.**
- 2) Adopt staff recommendation to not allow for occupations requiring training below or degrees beyond PSAV and/or the Community College level.**
- 3) Approve delegation of authority to WFI's President, or his designee, to formally approve/disapprove additions to regional targeted occupations lists during the course of the fiscal year as recommended by staff based on research and analysis by WFI and DEO staff using current labor market information.**

## ATTACHMENT A

| <b>2013-2014 Regional Targeted Occupations Lists<br/>Recommended Regional Requests for Additions</b> |          |  |
|--|----------|--|
|  | SOC Code | Region   |
|  |          | Occupational Title   |
| <b>Region 2 (Okaloosa &amp; Walton)</b>  |          |  |
| 1  | 493011   | Aircraft Mechanics and Service Technicians                 |
| 2  | 333012   | Correctional Officers and Jailers                          |
| 3  | 434051   | Customer Service Representative                            |
| 4  | 434131   | Loan Interviewers and Clerks                               |
| 5  | 435031   | Police, Fire, and Ambulance Dispatchers                    |
| 6  | 419021   | Real Estate Brokers  |
| 7  | 436014   | Secretaries, Except Legal, Medical, and Executive          |
| 8  | 253021   | Self-Enrichment Education Teachers                         |
| 9  | 173031   | Surveying and Mapping Technicians                          |
| 10   | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 6 (Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor)</b>                          |          |  |
| 1  | 493031   | Bus and Truck Mechanics and Diesel Engine Specialists      |
| 2  | 352014   | Cooks, Restaurant  |
| 3  | 333012   | Correctional Officers and Jailers                          |
| 4  | 434051   | Customer Service Representative                            |
| 5  | 472073   | Operating Engineers/Construction Equipment Operators       |
| 6  | 292052   | Pharmacy Technicians                                       |
| 7  | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 10 (Citrus, Levy, Marion)</b>  |          |  |
| 1  | 312021   | Physical Therapist Assistants                              |
| <b>Region 11 (Flagler Volusia)</b>   |          |  |
| 1  | 434051   | Customer Service Representative                            |
| 2  | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 12 (Orange, Osceola, Seminole, Lake, Sumter)</b>   |          |  |
| 1  | 331021   | First-Line Superv. of Fire Fighting and Prevention Workers |
| 2  | 319799   | Healthcare Support Workers, All Other                      |
| 3  | 292052   | Pharmacy Technicians                                       |
| <b>Region 13 (Brevard)</b>   |          |  |
| 1  | 173021   | Aerospace Engineering and Operations Technicians           |
| 2  | 512011   | Aircraft Structure, Surfaces, and Systems Assemblers       |
| 3  | 532022   | Airfield Operations Specialists                            |
| 4  | 532011   | Airline Pilots, Copilots, and Flight Engineers             |
| 5  | 173011   | Architectural and Civil Drafters                           |
| 6  | 493021   | Automotive Body and Related Repairers                      |
| 7  | 493023   | Automotive Service Technicians and Mechanics               |
| 8  | 492091   | Avionics Technicians                                       |
| 9  | 194021   | Biological Technicians                                     |
| 10   | 493031   | Bus and Truck Mechanics and Diesel Engine Specialists      |
| 11   | 535021   | Captains, Mates, and Pilots of Water Vessels               |
| 12   | 351011   | Chefs and Head Cooks                                       |
| 13   | 194031   | Chemical Technicians                                       |

|                                 | SOC Code  | Region  |
|---------------------------------|-----------|---|
|                                 |           | Occupational Title                                      |
| 14                              | 492011    | Computer, ATM, and Office Machine Repairers             |
| 15                              | 151799    | Computer Occupations, All Other                         |
| 16                              | 151131    | Computer Programmers                                    |
| 17                              | 434051    | Customer Service Representative                         |
| 18                              | 173023    | Electrical and Electronic Engineering Technicians       |
| 19                              | 492094    | Electronics Repairers, Commercial and Industrial Equip. |
| 20                              | 512091    | Fiberglass Laminators and Fabricators                   |
| 21                              | 531031    | First-Line Superv. of Material-Moving Vehicle Operators |
| 22                              | 173029.10 | Fuel Cell Technicians                                   |
| 23                              | 319099    | Healthcare Support Workers, All Other                   |
| 24                              | 434161    | Human Resources Assistants, Exc. Payroll                |
| 25                              | 119081    | Lodging Managers  |
| 26                              | 173027    | Mechanical Engineering Technicians                      |
| 27                              | 311012    | Nursing Aides, Orderlies, and Attendants                |
| 28                              | 312011    | Occupational Therapist Assistants                       |
| 29                              | 292081    | Opticians, Dispensing                                   |
| 30                              | 173029.08 | Photonics Technicians                                   |
| 31                              | 472151    | Pipelayers  |
| 32                              | 435031    | Police, Fire, and Ambulance Dispatchers                 |
| 33                              | 252011    | Preschool Teachers, Except Special Education            |
| 34                              | 435061    | Production, Planning, and Expediting Clerks             |
| 35                              | 259041    | Teacher Assistants                                      |
| 36                              | 518031    | Water and Liquid Waste Treatment Plant Operators        |
| <b>Region 14 (Pinellas)</b>     |           |   |
| 1                               | 493011    | Aircraft Mechanics and Service Technicians              |
| 2                               | 173011    | Architectural and Civil Drafters                        |
| 3                               | 493021    | Automotive Body and Related Repairers                   |
| 4                               | 493031    | Bus and Truck Mechanics and Diesel Engine Specialists   |
| 5                               | 311011    | Home Health Aides                                       |
| 6                               | 292012    | Medical and Clinical Laboratory Technicians             |
| 7                               | 292011    | Medical and Clinical Laboratory Technologists           |
| 8                               | 319094    | Medical Transcriptionists                               |
| 9                               | 311012    | Nursing Aides, Orderlies, and Attendants                |
| 10                              | 519083    | Ophthalmic Laboratory Technicians                       |
| 11                              | 292081    | Opticians, Dispensing                                   |
| 12                              | 292052    | Pharmacy Technicians                                    |
| 13                              | 493092    | Recreational Vehicle Service Technicians                |
| 14                              | 173031    | Surveying and Mapping Technicians                       |
| 15                              | 518031    | Water and Liquid Waste Treatment Plant Operators        |
| <b>Region 15 (Hillsborough)</b> |           |   |
| 1                               | 493011    | Aircraft Mechanics and Service Technicians              |
| 2                               | 173011    | Architectural and Civil Drafters                        |
| 3                               | 493021    | Automotive Body and Related Repairers                   |
| 4                               | 311011    | Home Health Aides                                       |
| 5                               | 319094    | Medical Transcriptionists                               |
| 6                               | 311012    | Nursing Aides, Orderlies, and Attendants                |

|  | SOC Code | Region  |
|--|----------|---|
|  |          | Occupational Title  |
| 7  | 519083   | Ophthalmic Laboratory Technicians   |
| 8  | 292081   | Opticians, Dispensing   |
| 9  | 292052   | Pharmacy Technicians  |
| 10   | 493092   | Recreational Vehicle Service Technicians  |
| 11   | 173031   | Surveying and Mapping Technicians   |
| 12   | 518031   | Water and Liquid Waste Treatment Plant Operators  |
| <b>Region 18 (Sarasota and Manatee)</b>                            |          |   |
| 1  | 472111   | Electricians  |
| 2  | 499031   | Home Appliance Repairers  |
| 3  | 514041   | Machinists  |
| 4  | 311012   | Nursing Aides, Orderlies, and Attendants  |
| 5  | 312011   | Occupational Therapist Assistants   |
| <b>Region 19 (Desoto, Hardee, and Highlands)</b>                   |          |   |
| 1  | 493011   | Aircraft Mechanics and Service Technicians  |
| 2  | 519081   | Dental Laboratory Technicians   |
| 3  | 519194   | Etchers and Engravers   |
| 4  | 519071   | Jewelers and Precious Stone and Metal Workers   |
| 5  | 311012   | Nursing Aides, Orderlies, and Attendants  |
| 6  | 519082   | Medical Appliance Technicians   |
| 7  | 519083   | Ophthalmic Laboratory Technicians   |
| 8  | 519000*  | Other Production Occupations - Only for these occupations*: 519012, 519071, 519081, 519082, 519083, 519141, and 519194. |
| 9  | 519141   | Semiconductor Processors  |
| 10   | 519012   | Separating/Clarifying/Precipitating/Still Machine Operators   |
| <b>Region 20 (Indian River, Martin, Okeechobee, and St. Lucie)</b> |          |   |
| 1  | 512011   | Aircraft Structure, Surfaces, and Systems Assemblers  |
| 2  | 395011   | Barbers   |
| 3  | 535021   | Captains, Mates, and Pilots of Water Vessels  |
| 4  | 492094   | Electronics Repairers, Commercial and Industrial Equip.   |
| <b>Region 21 (Palm Beach)</b>                                      |          |   |
| 1  | 312011   | Occupational Therapist Assistants   |
| 2  | 29-2057  | Ophthalmic Medical Technicians  |
| <b>Region 24 (Charlotte, Collier, Glades, Hendry, Lee)</b>         |          |   |
| 1  | 514011   | Computer-Controlled Machine Tool Operators, M & P   |
| 2  | 514041   | Machinists  |
| 3  | 311012   | Nursing Aides, Orderlies, and Attendants  |

|  | SOC Code  | Region<br>Occupational Title  |
|--|-----------|---|
| <b>Regional Requests for Additions Not Recommended - Due to Educational Levels Outside of PSAV/CC<br/>[Current WFI Policy only allows training at PSAV Certificate (3) and Community College Credit/Degree (4) levels]</b> |           |   |
| <b>Region 13 (Brevard)</b>   |           |   |
| 1  | 119041.01 | Biofuels/Biodiesel Technology and Product Development Managers - Requires Bachelor's Degree |
| 2  | 474099.01 | Solar Photovoltaic Installers - Requires less than high school                              |
| 3  | 474099.02 | Solar Thermal Installers and Technicians - Requires less than high school                   |
| 4  | 474099.03 | Weatherization Installers and Technicians - Requires less than high school                  |
| 5  | **        | Request for use of training funds for eligible customers pursuing Bachelors' degrees        |
| <b>Region 19 (Desoto, Hardee, and Highlands Counties)</b>  |           |   |
| 1  | 499098    | Helpers - Installation, Maintenance, and Repair Workers - Requires less than high school    |
| 2  | 519198    | Helpers - Production Workers - Requires less than high school                               |
| 3  | 291111    | Registered Nurses - Request for Bachelor's Degree (RN can be approved for CC level only)    |
| <b>Region 21 (Palm Beach)</b>  |           |   |
| 1  | 291071    | Physician Assistants - Requires Bachelor's Degree   |
| <b>Regional Request for Additions Not Recommended - Pending Submission of Local Data</b>   |           |   |
| <b>Region 6 (Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor)</b>  |           |   |
| 1  | 311012    | Nursing Aides, Orderlies, and Attendants  |
| 2  | 399021    | Personal and Home Care Aides  |
| 3  | 252011    | Preschool Teachers, Except Special Education  |

April 12, 2013

Jayne Burgess  
 Workforce Florida  
 1580 Waldo Palmer Lane, Ste 1  
 Tallahassee, Florida 32308

Dear Ms. Burgess:

This letter is to request consideration and approval by Workforce Florida, Inc. (WFI) for expenditure of training funds on occupations listed on the Region 13 Targeted Occupations List (TOL) for eligible customers pursuing Bachelor Degrees.

The recession, the retirement of the shuttle program and associated secondary losses have brought Region 13 many new challenges associated with the local area's population attaining the needed skills to obtain employment. Brevard Workforce is attempting to align educational opportunities to the Governor's \$10,000 Bachelor's Degree Challenge and to open the doors to higher education needed to fulfill the area's shortage of workers in demand occupations. According to the recent BLS Supply Demand report approximately 40% of the occupations in short supply in Brevard requires a Bachelor's Degree. The capability to provide funding for Bachelor's degrees will greatly assist Brevard Workforce in meeting current and future business needs. Brevard Workforce (BW) understands that this request will require a change to the rules.

The following chart provides some additional information to substantiate our request:

| Category                                      | Training Limitation   | Rationale  |
|---|---|--|
| Adult & Dislocated with Some College Credits. | Would apply to persons who already have an A.A. or college credits which could allow achievement of a Bachelors within 2 years. | Many of the remaining adult and dislocated workers who were not served by NEG and other special funding sources will remain in our community and continue needing services. Some of these persons have college credit and assisting with completion of a Bachelor's degree may be the most cost effective method to assist them. |

**Titusville Career Center**  
 3880 S. Washington Ave.  
 Titusville, FL 32780  
 Toll Free 504-7600

**Rockledge Career Center**  
 295 Barnes Blvd  
 Rockledge, FL 32955  
 Toll Free 504-7600

**Palm Bay Career Center**  
 5275 Babcock St. NE  
 Palm Bay, FL 32905  
 Toll Free 504-7600

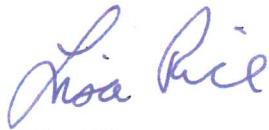
**Executive Offices**  
 297 Barnes Blvd.  
 Rockledge, FL 32955



| Category  | Training Limitation  | Rationale   |
|---|--|---|
| <p><b>Adult &amp;<br/>Dislocated<br/>Workers<br/>Pursuing a<br/>Bachelor<br/>Degree</b></p> | <ul style="list-style-type: none"> <li>• Limited to locally approved thresholds for allowable ITA investments.</li> <li>• Limited to persons who can provide verification that they have the balance of funds needed to pay for the degree.</li> </ul> | <p>Staff believes it is a logical step to allow the use of WIA funds to be used for Bachelor degree programs, especially for occupations with a shortage of degreed workers as demonstrated on the BLS Supply Demand Report of April 2013. BW's current "High Wage Tier" for ITA's is currently at \$9,000. As previously stated, Bachelor's degree may be the most cost effective method to assist them.</p> |

Thank you for your support and assistance. Please feel free to contact me if you have questions about this request.

Sincerely,



Lisa Rice  
President

# Action Item

## FLORIDA WORKFORCE SYSTEM STATEWIDE BRANDING INITIATIVE BRAND STRATEGY RECOMMENDATION

\* \* \* \* \*

Demand-driven and business-led, the Florida Workforce System is nationally recognized for innovative strategies. Through research-based strategic market analysis and collaborative input from stakeholders throughout Florida, the system is now developing recommendations and a plan for a new, statewide universal brand identity that conveys and promotes a comprehensive, unified and aligned system of world-class services for job seekers, workers and businesses.

More than 1,500 workforce system leaders, staff and stakeholders, including Florida consumers and employers, have contributed to the research and development of a new unified brand since the project officially launched in November 2012. Florida has an opportunity to lead the nation by being the first state to align its state board, 24 regional workforce boards and one-stop career centers around a single identity. Other state workforce systems such as Ohio and Virginia have indicated they are monitoring Florida's work. Several states including Texas, Kentucky, South Carolina, Illinois and California have implemented single or co-brand strategies. Texas, for example, brands its 28 local workforce development boards and more than 200 career centers as Workforce Solutions.

The work to develop brand strategy recommendations for the Florida Workforce System is being led by Workforce Florida Inc., its Chairman Dwayne Ingram, board and President/CEO Chris Hart IV as well as the branding consulting team IDEAS of Orlando. Regional workforce partners as well as the Department of Economic Opportunity have been involved at every stage. Workforce Florida also has collaborated with other statewide public-private partners such as Enterprise Florida Inc. and Visit Florida to enhance opportunities for strategic brand alignment by sharing information such as research and brand standards.

The project has two primary phases: Research and Engagement and Brand Development and Implementation and Outreach Planning. (A short outline of the major project activities to date also is included in this packet.)

Why has the state embarked on this workforce branding initiative?



- First, it's required by law. The Regional Workforce Boards Accountability of 2012, which was approved by the Florida Legislature, signed by Governor Rick Scott, and took effect on July 1, 2012, calls for the development of a single, statewide workforce brand. The law is consistent with the Governor's focus on making state government and their publicly funded entities more efficient and effective.
- Second, with myriad workforce system brands (local and state), there is a high lack of awareness and little clarity regarding publicly funded workforce services in Florida and the entities that comprise the state system. Brand research indicates a vast opportunity to address market confusion through a cohesive and consistent identity and brand architecture. Also the results of recent market testing for proposed name and logo concepts indicate prospective new names would begin to address some of the misperceptions about the system's access to and assistance with talent ranging from entry-level to professional.
- Investments in a unified brand identity also will allow for greater leveraging of outreach resources by Florida's 24 regional workforce boards and the state board and should result in future efficiencies. The opportunities to realize efficiencies and increase awareness among prospective customers — employers and job seekers — are especially critical now as Florida's, mostly federally funded, system again confronts the issue of declining funding, a trend expected to persist as the economy continues to improve.

Brand research by Team IDEAS underscores the need for brand clarity and much can be learned from the findings to not only support brand building for the workforce system but also service improvements. This research is being shared systemwide.

Key findings in a statewide employer survey indicate that:

- Among a randomly selected sample of employers, only a quarter are aware and knowledgeable of the workforce system.
- Consistent with the lack of knowledge, 52 percent say they aren't sure if the system is effective or not.
- Consistent with findings in a consumer survey of job seekers and employed workers, most employers think the system exists to assist unskilled job seekers and does not provide quality candidates.
- In contrast, among a sample of employers who were recommended by regional workforce boards, these businesses have a high likelihood to use the system in the

future, although 14 percent indicated they will not. Satisfaction ratings for those who have used local workforce services is high.

- Whether internally referred or randomly chosen to participate in the survey, those businesses that said they are not likely to use the workforce system in the future cite two main reasons:
  - Belief that the system is not a reliable source for the type job candidates and employees they are seeking; or
  - They or someone they know had an unfavorable prior experience in which they were sent unqualified candidates.
- Worth noting is that the lack of knowledge and awareness not only reaffirms the need for a unified brand, but represents tremendous opportunity to introduce or reintroduce the system's services to Florida businesses.

Among key findings in the statewide survey of consumers, including Floridians who are not employed and seeking a job, underemployed or gainfully employed:

- More than half of Floridians have name awareness, but most are not knowledgeable about any workforce system entities including the one-stop career center or regional workforce boards in their communities; the Employ Florida Marketplace at [EmployFlorida.com](http://EmployFlorida.com); Workforce Florida; or the Florida Department of Economic Opportunity.
- The most recognizable of the state workforce system entities, as would be expected, are the career centers and [EmployFlorida.com](http://EmployFlorida.com).
- Developing a positive identity among job seekers, under-employed, and employed Floridians, who act as referring agents for those seeking to go to work, should be a key focus of the workforce system.
- The workforce system is largely perceived to be a resource to help less educated and less skilled workers find work.
- Most are either not sure of the effectiveness of the system or perceive it to be ineffective.
- Most college educated and professional people do not see the system as being relevant to them.

In both instances, these findings provide important lessons and highlight opportunities for a new unified brand. Among them, it is important that the new brand, which is much more than just a new name and logo:

- Show relevance to all Florida residents seeking employment, including educated professionals and highly skilled workers.

- Be easily identifiable as a unique entity that is separate from other “government” organizations such as state, county and city offices and that it not be perceived as the unemployment office.
- Compete and compare favorably to highly used and trusted websites such as Monster.com and CareerBuilder.com in terms of functionality, pertinent job prospects and leads.
- Align the system’s brand promise to the quality and consistency of products and services delivered by all locations and touch points.
- Build positive word-of-mouth through successful placement of qualified individuals.

Both quantitative and qualitative research was used to develop recommendations. Internal workforce system culture, perspectives, “stories” and input were extensively gathered and analyzed through a series of opportunities that included Culture Mapping™ and StoryJam™ sessions (which are similar to focus groups), one-on-one interviews with regional workforce board chief executives and local board and one-stop center visits as well as a brand audit of workforce system’s in Florida, Georgia, Alabama, Kentucky and Texas. Workforce Florida Board members also contributed to this work. In many cases, workforce professionals, volunteer board leaders and partners — local and state — had multiple opportunities to engage.

The brand strategy recommendations (a unified brand charter, nomenclature and logo) being advanced to the board are a culmination of this work. While this significant undertaking has benefited from the involvement of many leaders across the state, the leadership and support of Workforce Florida partners including Florida Workforce Development Association President Richard Williams, who also is the Executive Director of the Chipola Regional Workforce Development Board, and the Branding Advisory Panel made up of regional workforce board chief executives, communications directors and business services liaisons as well as a leader from the Department of Economic Opportunity have been particularly instrumental. (See the attachment for an advisory panel membership list.)

While the unified brand is represented by the charter, nomenclature and logo, which will be considered by the Workforce Florida Board, it embodies so much more. The Florida Workforce System brand “lives” in the experiences and perceptions of its customers, prospective customers, partners, stakeholders — and the public — and is indelibly linked to its ability to deliver on its brand promise every day.

The proposed brand strategy for a unified brand for the Florida Workforce System is market-driven, customer-focused and will deliver consistency across the state — with local adaptability. It will not impose operational constraints on regional workforce boards, which

will continue to exercise local flexibility in their strategy, policy and program development to respond to the unique needs of their communities.

The proposed brand charter is included in this packet. Five brand names and a series of logo concepts were market tested among 150 Florida employers and 400 consumers. The recommended brand name and logo overwhelmingly received the most favorable endorsement from the marketplace. The research results and staff recommendations will be fully presented during the board's quarterly meeting.

\* \* \* \* \*

### **Needed Action**

**Approve the brand charter, nomenclature and logo to establish a new statewide unified brand for the Florida Workforce System that, through implementation, will establish a new, aligned universal brand identity for Workforce Florida Inc., all of Florida's regional workforce boards and one-stop career centers.**



## **Branding Advisory Panel Members**

*Workforce Florida Inc. would like to thank the following leaders for their exemplary and ongoing contributions to the Florida Workforce System Branding Initiative:*

### **Regional Workforce Boards Chief Executives**

- **Rick Beasley**, Executive Director, South Florida Workforce
- **Rick Fraser**, President, Center for Business Excellence
- **Pamela Nabors**, President & CEO, Workforce Central Florida
- **Kim Tesch-Vaught**, Executive Director, FloridaWorks

### **Regional Workforce Boards Communications Directors**

- **Laura Byrnes**, Communications Manager, Workforce Connection
- **Candace Moody**, Vice President of Communications, WorkSource
- **Tom Veenstra**, Director, Corporate Communications and Information Technology, Workforce Alliance

### **Regional Workforce Boards Business Services Directors**

- **Judy Blanchard**, Industry Relations Director, Brevard Workforce
- **Kenny Griffin**, Business Services Coordinator, Chipola Regional Workforce Development Board

### **Florida Department of Economic Opportunity**

- **Lois Scott**, Program Manager, Division of Workforce Services, Department of Economic Opportunity

## **BRANDING INITIATIVE TIMETABLE AT-A-GLANCE**

### **NOVEMBER 2012** *(Phase 1 Research and Engagement)*

- Project Launch and Beginning of Field Inquiry/Workforce Florida Quarterly Board Meeting

### **DECEMBER 2012**

- Culture Mapping™ Sessions
  - 10 destinations, 27 two-hour sessions, workforce leaders, professionals, partners and customers\*
- Launch Consumer Awareness and Perception Survey
  - 593 Floridians

### **JANUARY 2013**

- Story Jam™ Sessions
  - 60 leaders; two, daylong workshops
- Brand Audit
  - 16 regional workforce board chief executive interviews; five-state review (Florida, Georgia, Texas, Alabama, Kentucky); U.S. Department of Labor interview
- Branding Research Briefing
  - Workforce Florida, Enterprise Florida and Visit Florida

### **FEBRUARY 2013**

- Research Reports Completion and Workforce Florida Board Presentation of Findings
  - Culture Mapping™; StoryJam™; Consumer Survey; Brand Audit
- Launch Employer Awareness and Perception Survey
  - 101 Employers

*\* The final Culture Mapping Session was conducted on Feb. 5, 2013, in Homestead.*

**MARCH 2013** *(Phase 2 Brand Development, Implementation and Outreach Planning)*

- Brand Charter and Nomenclature Development
- Branding Advisory Panel Formation *(panel meets twice monthly via webinar and teleconference with Workforce Florida's Branding Project Team)*
  - Regional Workforce Board Executive Directors, Communications Directors, Business Liaisons and the Department of Economic Opportunity

**APRIL 2013**

- Brand Visual Identity Development
- Branding Initiative Update Webinar for Florida Workforce System Leaders
- Nomenclature and Logo Market Testing
  - 150 Employers; 400 Florida residents
- Brand Architecture Development
- Presentation of Employer Research, Nomenclature and Logo Concepts to Statewide Business Liaisons Workshop

**MAY 2013**

- Brand Recommendations to the Workforce Florida Board

**JUNE 2013**

- Brand Standards
- Implementation and Outreach Plan

**JULY 2013-JUNE 2014**

- Transition and Implementation Begins with Internal Preparation; Public Roll-out Target Date To Be Determined

# PROPOSED FLORIDA WORKFORCE SYSTEM UNIFIED BRAND CHARTER

Created by those who work within the system – and guided by those for whom the system is designed to serve – the Brand Charter captures the organization's brand by articulating its values, vision, mission, essence, position, promise, platform, personality and pillars.



**VALUES** are the **unswerving core beliefs** and spiritual foundation of the system. These values express the things about the Florida Workforce System brand that won't change over time; they are the bedrock and are embraced by the entire organization and everyone doing business with it.

- **Business-Driven:** We believe Florida employers – the state's job creators – are essential to our overall success in providing effective, market-relevant workforce solutions that drive economic growth and sustainability.
- **Continuous Improvement:** Driven by our commitment to excellence, we respond to changing market dynamics. We continually strive to improve our performance to better anticipate and address the talent needs of employers and the employment and skills needs of job seekers and workers. We identify, measure and replicate success.
- **Integrity:** We fulfill our mission with honesty and accountability and strive in every decision and action to earn and protect the public trust.
- **Talent Focus:** We believe in the power of talent to advance every enterprise and open the door to life-enhancing economic opportunities for individuals, businesses and communities. Our commitment is to make talent Florida's key competitive asset.
- **Purpose-Driven:** Our work is meaningful and through it, we can inspire hope, achievement and economic prosperity in the lives of the customers we serve.

**VISION** is a **“to be” statement for the system.** A simple, clear description of our compelling aspiration. The brand vision is intentionally aspirational; it is high-reaching and reflective of a goal not only for the system but for everyone it touches.

Florida will be the global leader for talent.

**MISSION** is a **succinct description of the work we will do** to achieve the vision. This is what we get up every day thinking about. It directly informs our structure, staffing and design of our operations and is the most visible to the market.

The Florida Workforce System connects employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity.







**ESSENCE is the emotional component of the brand** and captures what we want employers and job seekers to feel about us, voiced in their first person. It's the feeling we want people to have when they think of the Florida Workforce System.

**Employer** – "I have a partner who understands my business and is consistently focused on my success. This partner speaks my language, understands my industry and plays an integral role in developing and sustaining my greatest asset — my workforce. I value and trust this partner and tell others to do the same."

**Job Seeker/Worker** – "I know that I am supported by professionals who believe my success and career advancement are their highest priorities. They are knowledgeable, compassionate and action-oriented. Their expert guidance is always delivered with dignity and respect."

**POSITIONING is what we want said about us** and how we want to be positioned in the marketplace. Brand positioning keeps us on course and clear about the experience we create for employers and job seekers.

Florida's Workforce System is an essential catalyst for the state's Talent Supply System and a recognized and relevant resource for business.

The system is driven by both private-sector and public-sector leadership to respond to the employment and training needs of businesses, job seekers and workers.

Along with partners in industry, education, economic development and community development, workforce leaders and professionals seek to align the talent development needs of Florida businesses and job seekers, cultivate a highly skilled workforce, and provide access to training, education, employment and career advancement opportunities for Floridians.

**PROMISE is the implicit contract** between the Workforce brand and the job seeker, employer or stakeholder. It's clear, concise and unique to Florida's Workforce system. It is a basis for making deliverable decisions: at each key decision point, we should ask; "Does this deliver on our promise?"

Florida's Workforce System promises a dedicated team of professionals who possess an understanding of your needs. Uniquely positioned, we offer assets, expertise and effective partnerships to deliver seamless and efficient services, demonstrate our value to all customers through results and drive economic priorities through talent development.

**PLATFORM is the "Big Idea"** for the brand; not the ad copy, but what it points to.

World-Class Talent Development to Meet Current and Future Needs of Florida Employers



**PERSONALITY** is our brand's attitude, style and voice as stated in its own first-person voice.

I am confident in my ability to make a positive contribution to Florida businesses and a significant difference in the lives of the job seekers and workers I serve. My work is important and I approach it with respect and passion.

I am driven by the opportunity to link employers with people who can make them successful and profitable. I have extensive experience and know how to get things done.

I understand the industries I serve and recognize the varying needs and expectations of companies doing business here. My network of relationships with educational institutions as well as economic development and community organizations make me a well-informed, high-performance partner. I will not stop until I have filled the last open position and helped every job seeker find meaningful employment.

Though I am part of a unified workforce system, which brings greater clarity and visibility to those seeking to connect with me, I am empowered to customize strategies and solutions that address unique workforce challenges and needs.

I believe in my contributions to our economy and know that if I am doing my job well, Florida will be more competitive and a top destination for business.

**PILLARS** are solid, defined concepts that support the brand. Action-oriented, these words galvanize the system behind the brand and tell us how to deliver on our promises.

Collaborate – Innovate – Lead





## Finance & Efficiency Council Meeting Agenda

**MAY 21, 2013**  
**1:15 P.M. TO 3:45 P.M.**  
**Grand Hyatt Tampa Bay • Audobon II/BC**

- |   |                        |
|---|------------------------|
| <b>I. Welcome &amp; Introduction</b>  | <i>Andy Perez</i>      |
| <b>II. Opening Remarks</b>  | <i>Andy Perez</i>      |
| <b>III. Self Introductions</b>  | <i>Council Members</i> |
| <b>IV. Review of Today's Agenda</b>   | <i>Andy Perez</i>      |
| <b>V. Action Items</b>  |                        |
| <ul style="list-style-type: none"><li>• Approval of State and Regional Budget Allocations for Fiscal Year 2013-2014</li></ul>   | <i>Scott Fennell</i>   |
| <ul style="list-style-type: none"><li>1. Workforce Investment Act Funding</li><li>2. Temporary Assistance to Needy Families (TANF) Funding</li><li>3. Wagner-Peyser</li><li>4. Jointly Managed Programs</li><li>5. Workforce Florida Budget</li></ul> |                        |
| <ul style="list-style-type: none"><li>• Polk Works request for designation as a direct provider of WIA Youth Services</li></ul>   | <i>Lois Scott</i>      |
| <b>VI. Open Discussion</b>  |                        |
| <b>VII. Chair's Closing Remarks / Adjourn</b>   | <i>Andy Perez</i>      |



# **Finance and Efficiency Council**

## **Meeting Summary**

**February 23, 2013**

### **Roll Call/Quorum**

Council Chairman Andy Perez called the meeting to order and asked for those seated to introduce themselves. The following introduced themselves:

Mr. Scott Fennell  
Mr. Lumon May  
Mr. Ben Grzesik  
Ms. Maria Rodriguez  
Mr. George Hauer  
Mr. Eric Kennedy  
Mr. Dennis Meyers  
Mr. Alex Moseley

### **ACTION ITEM 1 – Approval of Future Electronic Board Package Policy**

Chairman Perez announced that the first action item would be efficient and save cost. Chair Perez turned this item over to Staff to the Council, Scott Fennell, who introduced Nathan Roberts, WFI IT, to present the recommendation.

Nathan Roberts recommended a PDF format which operates on every device and is user friendly.

Chairman Perez stated that this would be an option, but a paper copy would still be available if desired. Mr. Fennell added that having an electronic package could save, at least, \$1,000 and would allow you to review the package and come up with questions prior to the meeting; however, you could opt for a hard copy to be mailed or to receive a binder copy upon arrival at the meeting.

Mr. Moseley recommended that we monitor board member options for the first year and possibly have a sustainability award.

Motion: To approve that all future board packages be sent electronically.

Motion: Mr. Ben Grzesik  
Second: Mr. Alex Moseley

The motion passed unanimously.

## **INFORMATIONAL ITEM 1 - Expenditure Burn Rate Data for the Regions for the Programs that the Council Allocates Funds**

Staff to the Council, Mr. Scott Fennell, stated two main points and used Tab 12 as an example:

- Each program years funding should be spent within two years.
- Information is raw data and should always go with a narrative, discussion or question of any regional board, any executive director before forming an opinion of what the data shows.

Chairman Perez stated that his main focus is providing more information to educate the council as to their responsibility.

## **PRESENTATION ITEM 1 – Standardized Regional Provider Contract**

Chairman Perez called Mr. Jay Barber, General Counsel for WFI, to present. Mr. Barber reported that progress has been made on the ITA provider standardized contract. He noted that he and Ed Peachey, FWA President at the time, advised the committee that a standardized contract was feasible. Since that time twenty-four contracts have been collected and inventory has been performed on the contracts. He stated that there are two types of contracts: 1) written contracts (which is what we are trying to standardize) and 2) or voucher program (no contract is entered directly with the ITA provider, instead a promissory note or a check is written to the customer that is then written to the provider, the customer takes the voucher to the provider the provider provides the services and bills the region).

Almost all of the regions do have contracts. Some contracts are more extensive than others, which will make it more challenging to standardize. (i.e. Region 23; 56 pages and Region 1; 2 pages). However, he will give it a try. He noted that he had requested information from the regions and in that request he asked that they nominate someone to serve on the committee. Twenty three people were nominated. A workable committee would be approximately five and to determine who would be on the committee: FWDA, Chairman Perez and other colleagues in the arena were consulted. A well rounded committee was established and includes two VPs, a program training coordinator, a contracts manager and two executive directors from Region 14 and 15 and Richard Williams will be involved and Andy Perez will be the board representative. The initial meeting will be held by conference call the first week in March.

## **PRESENTATION ITEM 2: Selection or Retention of Training Providers Update and Discussion**

Chairman Perez called Mr. Dave Cooper, Policy Director for WFI. Mr. Cooper updated the committee on the status of the statewide employer training provider list. He stated that Federal law requires that the state maintain a list of eligible providers in the region. The latest listing has been updated and will identify online providers. Courses are provided online for training and education thus a list will be maintained and up to date for the regions throughout the state. DEO will issue the guidance for the eligible provider list.

Chairman Perez added that E-Learning is being discussed as a possible solution to address: training and education, and the exorbitant cost for higher education and that Floridians could benefit.

Mr. Cooper stated that DEO will provide an updated listing of providers in May.

### **PRESENTATION ITEM 3: Drupal Easy Career Starter Program**

Chairman Perez introduced Gwendolyn Anello of Drupal Easy.

Ms. Anello discussed the Drupal Easy Career Starter Program. Drupal Easy is the first and only Drupal Career Training Program in the world and its base is in Florida. It is a pilot program supported by Brevard County workforce and the committee that oversaw the NEG funds. It trains and captures economic opportunity in the field of open source technology: a unique, multi-week, multi-model program and it condenses the time that people are employable in Drupal.

Ms. Anello stated that there is a huge need for people with Drupal talent and that Open Source Technologies are based on newer information communication technologies. They are gaining a lot of traction in business of all sizes. Open Source solutions are generally more cost effective than the proprietary options. It's collaborated among individuals and developers of which most are small businesses. The money is made from the services used to put the products together to serve different clients and the products are generally free. It relies on the dedication and expertise within the community to make it grow. It's a global collaboration and the internet helps greatly by allowing developers to have open chats about this type of technology. Open Source is a philosophy, giving someone the foundation of something you create and allowing them to use it for free and change it and make it better. Users and developers can change it and once you do you are to upload it and share your improvements with the community. The platform is open source. Open Source builds global collaborative communities of stakeholders. Examples of Open Source are: Android phones platform, Firefox, scripting languages and operating systems: PHP and GLINEX, Word Press and Drupal.

Ms. Anello presented a video with the Drupal logo.

Ms. Anello went on to discuss that Drupal runs 2% of the world's websites. It's huge in education (no cost), commerce and entertainment (SONY music artist use Drupal to build their sites). The Department of Education and Energy, White House, SBA, FAA are switching to Drupal. It also runs smaller sites like stores, small commerce sites, small local government, hospitals and libraries. It's cost effective, modular and open source. It's scalable. The security team is large and it's fast. Users can be granted various levels of permission to add and update content. The State of Georgia figures they are saving 4.6 million dollars by transferring all of their websites to Drupal.

Drupal is low cost, flexible, easy to maintain, state of the art and it is secure. Information was given to provide resources where you can find more information about Drupal. Drupal is about

capturing work from around the globe for the workforce. Instead of preparing people for jobs, you are preparing them to work in the industry so job training is not specific. They learn about Drupal and discover what they're good at and are prepared to work within the industry. You're capturing wealth from the global community, not just filling the needs of local employers or preparing people to bring in large employers and bringing new money directly into your economy. Instead of transferring money between everybody, you're bringing new money in.

She stated that, currently, there are more contracting positions exist than jobs in Drupal. Florida's Hospital site is built on Drupal and they currently have Drupal people staffed on their site. It's reliant on community credibility. Contracting positions can be long or short. DrupalEasy has two employees, but have 25 contractors that are used from around the world. It's growing locally. Some are long terms and others are special projects people that are built into projects. Most of the jobs and contracting positions are virtual. Drupal.org, MONSTER and Career Builder has some work posted. After monitoring it for about six months there are about two hundred new positions every month, mostly on Drupal.org both contracting and full time positions.

Although Drupal is growing at an enormous pace, the downside is that Drupal is a new technology and people want rock stars and there are more people below the rock star status than above the rock star status. This is realized by the community and they are willing to nurture the "newbies" by allowing them to take on interns and allow them to work on projects and build their portfolios and credibility within the community.

Ms. Anello shared that the non-Florida path to Drupal is self teaching and workshops. There are no guided paths; you must find your way in the dark. It's not a certified program. It's free form. There is a lot of trial and error and there is little to no income in the two to three years it usually takes for people to become proficient in Drupal. The DrupalEasy career training concept is to condense the path to employability and self-sufficiency by use of multi-week classroom training, independent assignments with tech support, formal online resources that coincide with the curriculum that's been developed for the ten week program. Drupal meet ups are held monthly and in Broward County every two weeks. Most times there are, at least, forty people.

Group collaborations, mentoring and internships can condense the time that people can get employable. The workforce board is provided with more than just the training program. The application and selection process is all done online at our website. All the training material is provided and we help coordinate the work experience/WeDrupal through the AWE Program.

For outreach, we provide the content and materials and we make presentations. Applications are screened and we look at what people know, we do a Taste of Drupal briefing that is two-fold:

- To ensure that people do not assume that a job is definite at the end of ten weeks
- To get a taste of the people in the course who really understand technology and who would be successful in moving forward

Ms. Anello stressed that the training is intense; it's two nights a week for three and a half hours per course, it's goal-driven, informal, and lab driven. Students are required to contribute back to

the community. Contributors of Drupal.org develop new modules and ask for feedback and for documentation on how to use them. Your name is associated with you on Drupal.org and every time you assist people. There is mentor guidance for each participant.

WeDrupal is a complicated process because you are working with companies all over the world, in some cases. All of the host outreach through DrupalEasy channels within the community. There is an application process and students post their profiles on the website and companies view their application and WeDrupal makes the introductions.

Some of the accomplishments so far are that thirty eight people have started the course in two different sessions and thirty eight people have completed the course in those two sessions. Eight nine of those completers are internship ready. There are no certifications in the open source community. You have to be knowledgeable. Initially, there were thirty internships available to the students in the course. Now there are twenty organizations that have asked to be kept perpetually on a list to train interns.

A course response was sent out and everyone was very pleased.

Drupal is awaiting official notification of a provisional license.

Things to note:

- 1) Lisa Rice and I are presenting a session to the National Association of Workforce Boards
- 2) We have had three inquiries from the United States to present the program to workforce boards from New York, Pennsylvania and Minnesota.
- 3) We run a DrupalEasy podcast weekly

With Drupal there is a real opportunity for the state to shine. Florida is the number one training region in the world. Florida Drupal Camp is one of the largest in the southeast. During this years' camp a business summit will take place and there is hope to get a White House information personnel, who puts their website together, to speak to government and business about the advantages of using Drupal and the cost savings that are involved.

Ms. Anello ended by saying that they would like to make Florida the Drupal development center of the United States. She thanked everyone for their attention and asked if there were any questions.

Chairman Perez mentioned a local employer who has worked with Lisa Rice from Brevard County and how they addressed the issue of the space cost and the brain train of talent that was leaving the state and how this council was part of that by placing funds in the space cost and addressing that issue. This was an example of a small medium sized business that has been a success.



#### **PRESENTATION ITEM 4: Reemployment Assistance Integration with EFN**

Tom Clendenning provided background about the Department of Economic Opportunity (DEO) and that it was formed with its unemployment compensation division being moved organizationally with the previous workforce services division. Individuals receiving unemployment benefits in Florida were automatically partially work registered in the workforce system that we had. Partial registrations do not provide a lot of information to the workforce boards and the one-stops. To the front line staff that's working with unemployment claimants is trying to help them get back to meaningful and gainful employment again. The individual may never go into the workforce system and Employ Florida Market Place. The regional workforce boards have been requesting claimants be required to fully register in EFM. If more information is provided, greater opportunities and tools readily available would be provided to the individual and better referrals could be made to employers needing workers and for retraining etc.

Mr. Clendenning shared that statute states requirements for our IT project to build a new claims and benefits system in Florida. The Unemployment Compensation in Florida was renamed the Reemployment Assistance Program and we call the work being done Project Connect, a claims and benefits system, for the Reemployment Assistance Program. Project Connect should go live and be deployed in October 2013.

Mr. Clendenning explained that Employ Florida Marketplace did not have a full registration track. With the economy greatly improved, the number of individuals greatly reduced receiving benefits in the state. At the height of the recession we had over 700,000 individuals receiving unemployment benefits and now it's less than 280,000. On average, there were 15,000 new claimants weekly. These individuals needed to be required to complete a full registration. We needed a means to send them to within Employ Florida Marketplace and there wasn't a full registration track. Last August version 13 of Employ Florida Marketplace was deployed for the first time which gave us a means to require claimants to be fully registered. Project Connect, upon deployment, gave us the legal authority to require claimants to fully register and not make it an option.

Mr. Clendenning ended by stating programming was completed in both systems to link data. An administrative rule was put into place in lieu of the law prior to Project Connect being deployed. All new claimants must fully register in the Employ Florida Marketplace as a part of their requirement to receive benefits hence the systems have been interfaced so that the claimant can go ahead and complete that full registration when they file their initial claim.

The current Employ Florida Marketplace with Geographic Solutions expires December 2014 and there are no more renewals on that contract.

Chairman Perez added that this is huge and that this program will save the state millions of dollars. It was almost impossible to do this with what information a claimant was originally required to give.

## **PRESENTATION ITEM 5: The Process and Audit Update**

Chairman Perez introduced Pam Nabors, President and CEO of Workforce Central Florida (WFCF).

Ms. Nabors introduced her chair, Kevin Shaughnessy and said she would be sharing the turnaround story for region 12, the second largest region in the state of Florida which consists of: Orange, Osceola, Lake and Sumter counties and their Workforce Central Florida's new mission statement:

Workforce Central Florida is dedicated to putting central Florida residents to work and finding and developing talent to keep central Florida businesses competitive.

Ms. Nabors explained the history of Workforce Central Florida. The financial policies and controls were insufficient to manage the 34 million dollars that the region should have put to work for the region, residents and businesses. DEO demanded repayment for a settlement that occurred in 2006 when a building that had purchased was foreclosed, federal resources had been inappropriately used for warehouse memberships, gift cards and a fleet of vehicles, there were 15 million dollars in question as there was no approved cost allocation plan and way to capture how staff appropriately allocated their time to the programs we oversee. WFCF was designated as a high risk grantee by the Governor, September 2011. Since transitioning to compliance, all the executives of the organization resigned during the fall of 2011, the board of directors was dismissed. A new board of directors was reappointed by a process through the chairs of the commissions and an interim executive director was appointed, Kevin Neil.

Joe Maleszewski, DEO's Inspector General, performed an analysis on our financial and procurement systems and identified additional issues. A personal accounting reporting system process was implemented through Jim Doyle, DEO and we trained out staff on this system. This training is ongoing with the staff. Committees were formed to include a: governance committee, youth committee, executive committee and a computing and engagement committee is being established. We created an audit committee to oversee our financial compliance. We have made an assertive effort to be transparent and to let the community know what is taking place.

As of December 2012, a senior management team was brought aboard and it comprised of directors in functional areas that are putting us on the path to impact and performance in our organization. She recognized Tonya Elliott, Communications Director.

Ms. Nabors mentioned that they are in the process of looking at their leases, renegotiating leases and creating efficiencies in how they deliver resources across the five county regions and admitted that the processes that caused the region to be askew were not following the required procedures for federal and state procurement and contracts. However, they have adopted the policies and are operating under the policies and providing staff training. They've resolved 16 of the 17 audit findings. The A-133 audit is almost complete and no material findings are expected. It's been a smooth process. A joint plan has been created with DEO and WFI partners to resolve the outstanding settlement disallowed cost by offset through administrative reduction of cost.

We are waiting to see if the US Department of Labor (USDOL) will accept the resolution on our disallowed cost. So far, we are getting positive feedback. An accounting firm has been hired, Taylor Lombardi Hall & Wydra PA and a compliance director has been brought aboard.

## **OPEN DISCUSSION**

### **Dislocated Workers Supplemental**

Mr. Scott Fennell stated that in May 2012 the state withheld a certain portion of the dislocated worker every year for rapid response activities i.e. a natural disaster or a plant closing where the state would put resources together to help those dislocated employees find employment. Mr. Fennell provided a handout of how the funds would be provided to each of the regions and stated that if there are any questions concerning how the funds are distributed to address them to himself or Jim Doyle. The Program Year 2012 Dislocated Worker Allocation Schedule is what is used. \$7 million of those dollars are being distributed to the regions. This additional allocation will be eligible for the fifty percent transfer to adult program activities as allowed by our waiver that we have with our state plan.

Regional Workforce board Executive Directors all expressed concern that the additional funds would fall within the 50% ITA requirement and indicated there may be a need for additional ITA waivers. Chairman Perez said to submit request to Mr. Fennell so that the waiver counsel can take request into consideration. Mr. Fennell stated that the waiver committee decides whether they want to approve or disapprove a request and accept re-requests.

Chairman Perez stated that the next meeting is in May. He will probably ask staff to call a teleconference for this council to add a preliminary meeting prior to that meeting. Chairman Perez said that the new allocations that are coming down from the USDOL are to analyze if we are going to have any de-obligated funds that we need to consider and probably reopen the discussion about the set aside. He asked if it is going to stay at 5% for this fiscal year. Mr. Fennell stated that he's not sure, but right now a bill is beginning to progress in the house that, from his understanding, the beginning work product has it at 10%. That is subject to change and there is no language available to review at this time. Mr. Fennell suggested that there be a series of calls as things progress to ensure the committee is aware of what has transpired as far as federal funding and what our allocation might look like at a state level.

Chairman Perez asked does the council have any items to bring up for open discussion.

The Waiver Committee, Dave, said that a meeting can't be scheduled in March, the earliest would be the first week in April and that waivers are retroactive. If anyone wants a waiver for the subsequent year they will need to reapply.

Chairman Perez ended by advising regions to look at how they can streamline/automate as many procedures and policies as possible. It's possible that we could receive a dramatic cut. More will be known by the May meeting. There will be, at least, one council meeting over the phone prior to the May meeting. Instruction is received from the national level, but the Governor still wants that 50,000 bench mark of placements. Services still need to be provided and we have to

figure out a way of doing it, which is why I'm pushing efficiency and automation of as many procedures as possible to save cost down the line.

Chairman Perez also strongly advised the regions to reach out to the marketing department within WFI. He complimented Region 12 to get their message out about the center of excellence investment. He thanked everyone for attending and stated that he'd see everyone at the board meeting.

Meeting adjourned.

# Action Item 1

## APPROVAL OF STATE AND REGIONAL BUDGET ALLOCATIONS FOR FISCAL YEAR 2013/14

\* \* \* \* \*

Each year, Florida receives notification of several federal awards and various state appropriations to be received during the upcoming fiscal year. In most cases, the manner in which distribution of such funds is to be made to the state and the regions is defined in the authorizing Federal Act or in the state appropriations bill; however, the specific state and regional calculations are not known until updated allocation factors are applied to the funding award. This action item will define these specific allocations in accordance with the authorizing grants, will provide suggested allocations of state-level funds to the various state initiatives and councils, and will seek Board approval for specific reserves, commitments and regional board allocations.

This action item covers several major funding streams, including the Workforce Investment Act, Welfare Transition, Wagner-Peyser, and several workforce related funding initiatives often referred to by the Department as “jointly managed programs.”

Funding provided under the Workforce Investment Act must be allocated in accordance with the authorizing Federal Act (Public Law 105-220, 8-7-1998). This act defines specific allocation methodologies for its three principal funding streams (Adult, Youth, and Dislocated Worker) to be followed in allocating funding to regional workforce boards, and defines allowances for funding levels for the state rapid response initiative and the state-level set-aside (also referred to as the Governor’s Reserve or as discretionary board funding).

In the case of Temporary Assistance for Needy Families/Welfare Transition state appropriated funds, the Florida Legislature allocates a certain level of funding to the workforce system but does not define specific regional allocations or the specific allocation methodology that the Board must use. However, the Legislature does define specific allocations in the form of specific line-item appropriations or specific proviso language which are often deducted from total funding available prior to allocation to the regions. This Board, in determining specific regional allocations, is required to maximize funds distributed directly to the regional boards through these appropriations, with such distributions to be based on the anticipated client caseload and the achievement of performance standards.

Specific direction and approval is needed by the Board for each of the major funding streams. To simplify the discussion and to clearly delineate the allocations being proposed, we will step through this action item with a multi-part action item as follows:

1. **Workforce Investment Act Funding** consisting of the Adult, Youth, and Dislocated Worker funding streams, with three separate discussions including:
  - a. Regional Board Allocations

- b. State Rapid Response Funds
  - c. State-Level Set Aside, or Governor's Reserve
2. **Temporary Assistance For Needy Families (TANF)**, including
  - a. State Level Allocations and Initiatives
  - b. Regional Board Allocations and Initiatives
3. **Jointly Managed Programs**, including
  - a. Wagner-Peyser
  - b. Combined Veterans Programs
  - c. Food Stamp Employment and Training Program (FSET)
  - d. Unemployment Compensation Services
4. **Approval of Workforce Florida Operating Budget**

## **WORKFORCE INVESTMENT ACT (WIA)**

**FEDERAL PROGRAM YEAR 2013 for Fiscal Year 2013/14 - \$162,222,368, (Prior Year 2012/13 \$184,650,766; decrease of \$22,428,398 or 12.15%)**

**BASIC PURPOSE AND ELIGIBILITY:** Provides both

1. core, intensive and training services to adults, youth and dislocated workers through the One-Stop delivery system; and
2. broad, nearly universal eligibility for low-cost core services (e.g. access to job listings), but more restrictive eligibility for intensive and training services based on low-income, employment barriers and/or dislocation from employment.

**SPECIFIC MANDATES/LIMITATIONS:** At present, there are multiple federal restrictions and regulations governing allocation to state and regional boards, the use of funds, reporting, etc. Further, State law mandates percentages of WIA funds that must be used for Individual Training Accounts (ITAs) at local levels.

**DISTRIBUTION MECHANISMS:** Federal laws specify formulas for distributing WIA among states and for sub-state allocations, primarily based upon relative shares of workforce, unemployment, and poverty factors. The original Public Law 105-220 provided that for adult and youth funding streams, 85% of the total federal award must be distributed to regional boards by formula, and allowed the Governor to reserve up to 15% at state level for operational expenses, performance-based incentive payments to regions, program management and oversight, and Board-authorized initiatives. Similarly, WIA Dislocated Worker funds also contributed 15% to the state-level "pool," with another 25% of the total federal award allocated for purposes of funding a state-level program for rapid response assistance to dislocated workers, including emergency supplements to regional boards. The remaining 60% of the federal dislocated funds were then distributed to the regions based on a formula emphasizing relative unemployment factors.

As was the situation in the last two fiscal years, changes have been made to this normal distribution with the passage of the **Full-Year Continuing Appropriations Act of 2013**. These Congressional

actions have decreased the portion of the formula grant funds the Governors may reserve for statewide activities by 10 percentage points, from 15% to 5%, representing a 66% reduction in funds available at the state level. These changes have not been made permanent yet, and efforts continue at the national level to have the 15% discretionary funding restored.

**SPECIFIC FUND DISTRIBUTIONS FOR FY 2013/14:** For specific identification of amounts to be received under the various WIA categories by the state and workforce regions, refer to the flowchart entitled “*Florida Funding for Workforce Investment Act.*”

As shown on this chart, a total of **\$162,222,368** has currently been awarded to Florida from Program Year 2013 funds for fiscal year 2013/14, down by **\$22,428,398** or a decrease of **12.15%** from the previous year’s grant award. From the total WIA funds awarded, a reduced percentage of 5% or **\$8,111,118**, is allocated by the Federal Act to the state-level set-aside pool; the statewide Dislocated Worker Program for Rapid Response unit is allocated 25% of the federal Dislocated Worker funding (a total of **\$16,777,344**), and the balance of **\$137,333,906** is allocated to the 24 regions.

|                              | <u>FY 2012/13</u>     | <u>FY 2013/14</u>     | <u>Change</u>          |
|------------------------------|-----------------------|-----------------------|------------------------|
| <b>Total WIA Grant Award</b> | <b>\$ 184,650,766</b> | <b>\$ 162,222,368</b> | <b>\$ (22,428,398)</b> |
| State Set-Aside (5%)         | 9,232,538             | 8,111,118             | (1,121,420)            |
| Rapid Response               | 19,372,058            | 16,777,344            | (2,594,714)            |
| Regional Allocations         | 156,046,170           | 137,333,906           | (18,712,264)           |

### REGIONAL WORKFORCE BOARD ALLOCATIONS

As shown on the *Florida Funding for Workforce Investment Act* chart for program year 2013, a total of **\$137,333,906** is available through direct formula allocations to the regions from the Adult, Youth, and Dislocated Worker funds. Federal laws specify formulas for distributing WIA among the twenty-four regions, primarily based upon relative shares of workforce, unemployment, and poverty factors. The Excel file entitled “*Program Year 2013 Workforce Investment Act, Regional Workforce Board Formula Allocations,*” shows the total allocations of WIA funds with a comparison to the prior year, and the four spreadsheets which follow that reflect the individual allocations for each of the three funding streams.

### WIA - STATE RAPID RESPONSE FUNDS

As noted previously, **25% or \$16,777,344** of the total federal WIA - Dislocated Worker funding (\$67,109,375) provided to the state for fiscal year 2013/14 is reserved by Federal law for purposes of establishing and operating the state-level Rapid Response unit. From this amount, the Board is required by Chapter 445, F.S., to maintain an Emergency Reserve, historically set at \$3,000,000, and to fund operational costs of the DEO Rapid Response Unit.

The following tabulation shows the distribution of the total federal award for fiscal year 2013/14:

|   |                           |
|---|---------------------------|
| <b>Total Dislocated Worker Funds (13/14)</b>  | <b>\$67,109,375</b>       |
| Less Regional Pass-Through (70%)              | <b>-46,976,563</b>        |
| Less Rapid Response State-Level Program (25%) | <b><u>-16,777,344</u></b> |
| <b>Balance for State-Level Set Aside (5%)</b> | <b>\$ 3,355,468</b>       |

The 5% balance (\$3,355,468) of Dislocated Worker Funds is incorporated into the total State-level set-aside pool which will be presented subsequent to this discussion.

From the total Rapid Response funding available to the Board from new-year funding, program management costs of **\$500,069** are being requested as well as continuation of the **\$3,000,000** emergency reserve to address major events that may occur during the new year.

|   |                            |
|---|----------------------------|
| <b>Total Rapid Response State-Level Allocation</b>            | <b>\$16,777,344</b>        |
| Plus: Projected Carry-forward from FY 2012/13                 | <u>1,674,091</u>           |
| <b>Projected Funds Available for FY 2013/14</b>               | <b><u>\$18,451,435</u></b> |
| Less: Proposed RR Program Unit Costs                          | -500,069                   |
| Less: Proposed Emergency Reserve ( <i>Chapter 445, F.S.</i> ) | <u>-3,000,000</u>          |
| <b>Balance Fund Reserve</b>                                   | <b>\$ 14,951,366</b>       |

In this action item, Workforce Florida, Inc., (WFI) staff propose allocating an additional **\$10,000,000** of the **\$14,951,366** that is available in discretionary dislocated worker funding through the use of the Regional Pass-through allocation formula. Combined with the \$3 million Emergency Reserve, the Board will have a total of **\$7,951,366** to fund supplemental requests from regions during the upcoming fiscal year for major dislocations and plant closures as well as the needs of the unemployed and long-term unemployed.

## STATE SET-ASIDE ALLOCATIONS

**5% State Set-Aside Allocation** - As shown in the “*Florida Funding for Workforce Investment Act*” chart, the federal act allocates a portion of each of the WIA Adult, Youth, and Dislocated Worker funding streams for use by the Governor for state-level initiatives. For fiscal year 2013/14, the amount currently allocated to the state is **\$8,111,118**, down from the previous year by \$1,121,420, or 12.15%.

From these state level funds, the Florida Legislature appropriates certain funds for administrative and program costs of the Department of Economic Opportunity and this Board. Additionally, in accordance with Section 445.003(3)(a)2, Florida Statutes, \$2 million in WIA set-aside funds must be allocated for the Incumbent Worker Training program, administered by WFI Board staff. From the balance of state-level WIA funds, this Board determines any additional or specific allotments for purposes of council allocations, and other demonstration and pilot projects and initiatives.



**Fund Shift for Wagner-Peyser 7(a)**

Allocations from Wagner-Peyser 7(a) at the Department of Economic Opportunity for Program Services have remained relatively fixed. In order to provide the required level of service to the regions yet maintain a consistent allocation to the regions, DEO has been using carryforward balances. However, there are no longer any carryforward balances available to offset the costs at the state-level. In order to ensure the maximum amount of Wagner-Peyser 7(a) funding is distributed to the regions; we are including a **one-time** fund shift from WIA State-Level funds in the amount of **\$1,665,038**. If this fund shift is not approved, the distribution of Wagner-Peyser 7(a) funds (to be discussed later in the action item) will be reduced in total by an equal amount.

|  | <b><u>FY 2012/13</u></b> | <b><u>FY 2013/14</u></b> |
|--|--------------------------|--------------------------|
| <b>Total PY WIA Set-Aside Pool</b>                     | <b>\$9,232,538</b>       | <b>\$8,111,118</b>       |
| Plus Estimated Bal of Recaptured Funds                 | 6,378,332                | 4,736,474                |
| <b>Total WIA Funds Available</b>                       | <b>15,610,870</b>        | <b>12,847,592</b>        |
| Less Appropriations and Required Allocations:          |                          |                          |
| DEO/WFI Program Services                               | -4,496,423               | -5,891,767               |
| OSMIS/GeoSolutions Cost Allocations                    | -118,691                 | -141,117                 |
| Incumbent Worker Training (Per FL Statute)             | -2,000,000               | -2,000,000               |
| Fund Shift from Wagner-Peyser                          |                          | -1,665,038               |
| <b>Balance of Funds Available for Board Discretion</b> | <b>\$8,995,756</b>       | <b>\$3,149,670</b>       |

**Discretionary Board Allocations** – As shown in the previous tabulation, WFI has discretionary funding in the amount of **\$3,149,670**, after combining the balance of WIA unobligated funding brought forward from the prior year with the new-year grant award and accounting for appropriations and required allocations.

The following recommendations for funding include initiatives of the Board, which have not been assigned under the auspices of one council or another and are separately identified and discussed.

**Supplemental Funding for Incumbent Worker Training Program (\$1,000,000)** - Since 2000, the IWT program has been funded at \$2.0 M per year (consistent with Florida Statute). Over the last couple of years, the WFI Board allocated additional funds to the program given the economic imperative of business and job retention and the overwhelming demand by businesses. With the additional use of recaptured dollars from previously closed out grants (all funds were allocated to specific projects by March 2013), the IWT program was able to support 225 businesses this fiscal year in upgrading the skills of 9,903 employees (with an average of \$26,722 per award or \$606 per trainee). Continued allocations to the IWT grant program will enable the workforce system to meet Florida businesses' high demand for skills upgrade training.

The results of the IWT grant program are impressive. According to 2010/2011 data from the Florida Education and Training Placement Information Program (FETPIP), trainees' wages increased 18.8 percent 12 months after the completion of training under IWT.

**Reserve for Councils and Committees (\$1,150,000)** - Much of the work in implementing the Board's strategic plan and vision, as presently reflected in the Operational Plans, falls under the direction and control of the Board's council structure. WFI's current strategic operational plans are now in their final (third) year of activity and include among others Target Industry Cluster Task Forces, Customer Satisfaction Indices for target and infrastructure industries and Supply/Demand analytics.

Contemporary goals specific to Florida's workforce system now include:

- 50,000 job placements each month
- Increasing business engagement (twice the current level for each region)
- Meeting WIA Common Measures (80% threshold of stretch goals for 2012/2013)
- Re-branding Florida's workforce system

Facing these goals will require deliberate action plans using a portion of the discretionary funding available to the Board and directed to the Councils as a part of this staff recommendation.

Each Council will be tasked with identifying and prioritizing specific initiatives that collectively help us meet these systemwide goals while proactively addressing the future talent needs essential to Florida's economic competitiveness, growth and prosperity. Ensuring Florida's workforce system is tied to the needs of the market place is essential not only for business vitality but also for each Floridian's ability to find and progress on a sound career pathway. Examples of initiatives currently envisioned for these councils include, but are not limited to:

- building on the three-year strategic and operational scope of work and resultant measurement systems;
- expanding business engagement—a shared goal articulated by WFI Chairman Dwayne Ingram and supported by Florida Workforce Chairs' Alliance Chairman Lenne' Nicklaus-Ball and identified as a top training priority of Florida's workforce professionals;
- better understanding of the talent needs of business so that our talent supply system can respond by developing human capital with the right knowledge, skills and abilities at the right time to the right industries;
- improving / modernizing workforce estimating / occupational forecasting methods to better respond to marketplace needs and available funding supports;
- capacity-building initiatives between regional workforce board business liaisons, economic development practitioners and educators focused on existing business outreach to determine talent needs and regional solutions; and
- using technology and data analytics to build collaborative opportunities, enhance efficiencies, formulate action plans and share information throughout the state.

**Stabilization Reserve (\$450,000)** - We have now entered a third year in which state-level WIA discretionary funding is provided at the reduced 5% amount. In addition, as our economy continues to improve, the amount of WIA funding for Florida will also be reduced, further impacting the amount of funds held at the state-level. Tough decisions will have to be made over the coming months and years concerning the types of financial commitments and activities

that are appropriate at the state-level, and what types of services and activities should no longer be performed. However, we recommend a gradual shift, as the more responsible and palatable approach, and such a shift is possible through prudent budget management. Therefore, we have introduced a stabilization reserve to ensure that as changes are made in the coming years we can minimize to the best extent possible the impact on services provided to our customers.

**Regional Performance Incentives (\$500,000)** - The current performance incentive policy relies heavily on formula-based calculations, which results in a large portion of the funds being distributed based on the size of the region, rather than on the performance of the region. The August Board meeting will be focused on performance and efficiency, and will include a staff recommendation on a more performance-based incentive policy. Once approved, these funds would be released pursuant to positive performance outcomes achieved by regional boards as defined within the Board’s new performance incentive policy and approved by the Governor.

**Discretionary Funding Summary**

In the event the foregoing reserves and commitments are approved by the Board, an estimated balance of **\$49,670** will remain available to the Board to fund other initiatives and projects during the course of the year. Please note that this amount is estimated due to the fact that certain current year funds may be required to be expended before the close out of fiscal year 2012/13 and may not be available for carry-forward purposes.

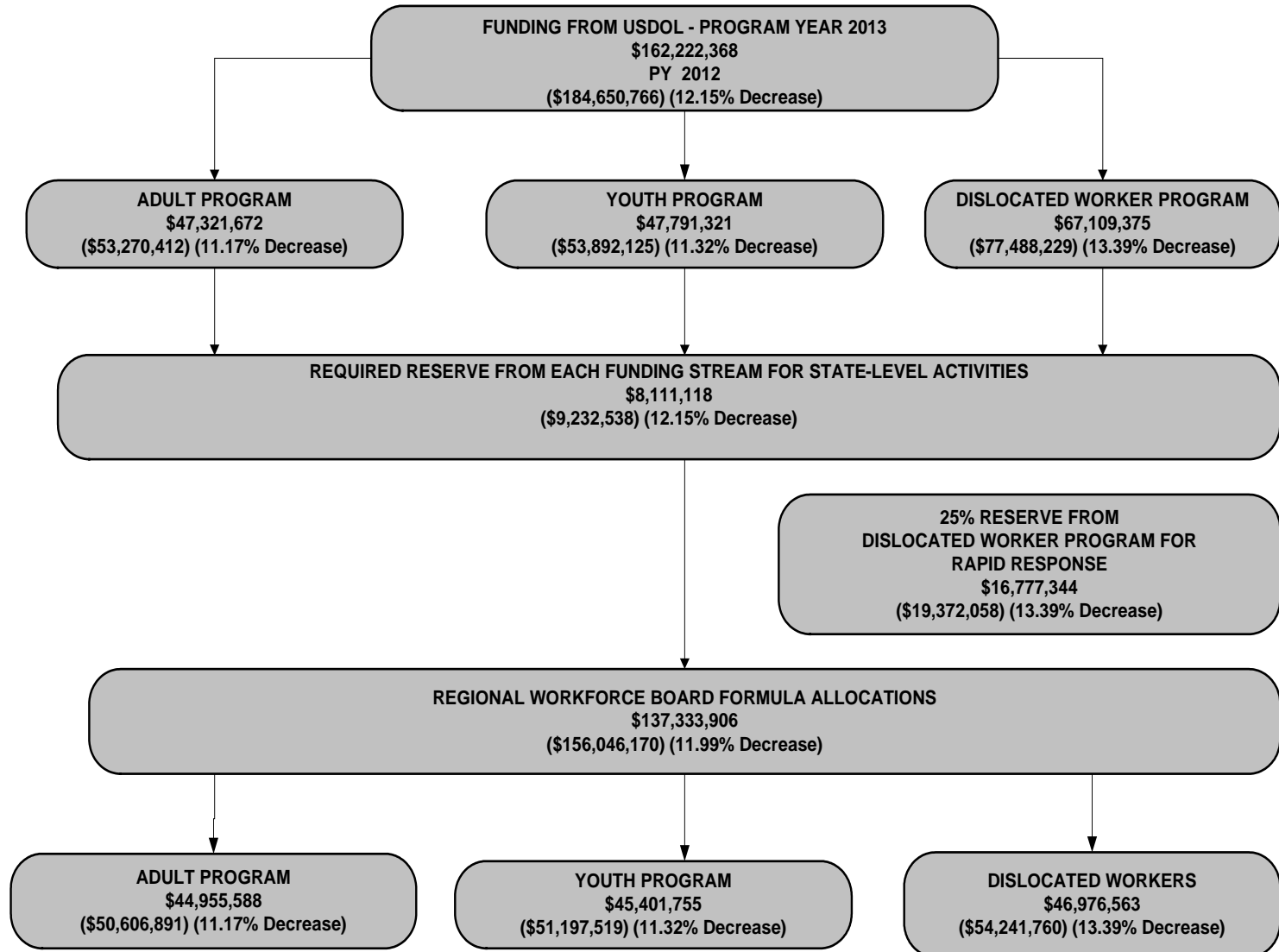
|   |                  |
|---|------------------|
| <b>Total 2013/14 WIA Funds Available</b>              | <b>3,149,670</b> |
| <b>Less Proposed Discretionary Board Allocations:</b> |                  |
| Supplemental Funding - IWT                            | (1,000,000)      |
| Reserve for Board and Council Initiatives             | (1,150,000)      |
| Stabilization Reserve                                 | (450,000)        |
| Regional Performance Incentives                       | (500,000)        |
| <b>Balance Remaining for State Projects</b>           | <b>49,670</b>    |

\* \* \* \* \*

**NEEDED ACTIONS**

- 1. Approval of the current regional Adult, Youth, and Dislocated Worker fund allocations.**
- 2. Approval to establish the 2013/14 WIA state-level set-aside allocations, to authorize funding for the Department of Economic Opportunity and to WFI for operations and administration, and to authorize other reserves and identified obligations and commitments.**

## FLORIDA FUNDING FOR WORKFORCE INVESTMENT ACT



**Program Year 2013 Workforce Investment Act  
Regional Workforce Board Formula Allocations**

| REGIONAL WORKFORCE BOARDS                                     | WIA ADULT           | WIA YOUTH           | WIA<br>DISLOCATED<br>WORKER | PY 2013<br>FINAL<br>ALLOCATION | PY 2012<br>FINAL<br>ALLOCATION | DIFFERENCE            | %             |
|---|---------------------|---------------------|-----------------------------|--------------------------------|--------------------------------|-----------------------|---------------|
| 1 Workforce Escarosa, Inc.                                    | \$1,063,000         | \$1,292,624         | \$1,127,014                 | \$3,482,638                    | \$4,030,027                    | (\$547,389)           | -13.6%        |
| 2 Workforce Development Board of Okaloosa and Walton Counties | \$445,378           | \$364,484           | \$383,560                   | \$1,193,422                    | \$1,420,264                    | (\$226,842)           | -16.0%        |
| 3 Chipola Regional Workforce Development Board                | \$471,584           | \$395,914           | \$244,696                   | \$1,112,194                    | \$1,156,342                    | (\$44,148)            | -3.8%         |
| 4 Gulf Coast Workforce Development Board                      | \$510,337           | \$531,532           | \$610,801                   | \$1,652,670                    | \$1,893,053                    | (\$240,383)           | -12.7%        |
| 5 Workforce Plus  | \$898,146           | \$1,715,510         | \$603,164                   | \$3,216,820                    | \$2,804,824                    | \$411,996             | 14.7%         |
| 6 North Florida Workforce Development Board                   | \$407,120           | \$441,079           | \$245,161                   | \$1,093,360                    | \$1,326,436                    | (\$233,076)           | -17.6%        |
| 7 Florida Crown Workforce Board, Inc.                         | \$355,072           | \$412,637           | \$186,032                   | \$953,741                      | \$1,216,112                    | (\$262,371)           | -21.6%        |
| 8 First Coast Workforce Development, Inc.                     | \$3,174,808         | \$3,446,940         | \$4,763,916                 | \$11,385,664                   | \$11,471,716                   | (\$86,052)            | -0.8%         |
| 9 Alachua/Bradford FloridaWorks                               | \$669,580           | \$1,414,877         | \$387,233                   | \$2,471,690                    | \$2,352,219                    | \$119,471             | 5.1%          |
| 10 Workforce Connection                                       | \$1,341,566         | \$1,235,889         | \$937,861                   | \$3,515,316                    | \$3,989,936                    | (\$474,620)           | -11.9%        |
| 11 Center for Business Excellence                             | \$1,420,393         | \$1,530,786         | \$1,503,782                 | \$4,454,961                    | \$5,164,651                    | (\$709,690)           | -13.7%        |
| 12 Workforce Central Florida                                  | \$4,992,088         | \$5,163,776         | \$5,561,309                 | \$15,717,173                   | \$17,717,636                   | (\$2,000,463)         | -11.3%        |
| 13 Brevard Workforce  | \$1,207,671         | \$1,065,988         | \$1,628,562                 | \$3,902,221                    | \$4,959,316                    | (\$1,057,095)         | -21.3%        |
| 14 WorkNet Pinellas   | \$2,050,005         | \$1,504,712         | \$1,906,138                 | \$5,460,855                    | \$6,720,867                    | (\$1,260,012)         | -18.7%        |
| 15 Tampa Bay WorkForce Alliance, Inc.                         | \$2,818,383         | \$3,123,037         | \$2,863,472                 | \$8,804,892                    | \$10,449,749                   | (\$1,644,857)         | -15.7%        |
| 16 Pasco-Hernando Workforce Board, Inc.                       | \$1,456,672         | \$1,331,022         | \$1,232,424                 | \$4,020,118                    | \$4,279,040                    | (\$258,922)           | -6.1%         |
| 17 Polk County Workforce Development Board                    | \$1,545,791         | \$1,565,883         | \$1,434,971                 | \$4,546,645                    | \$5,223,253                    | (\$676,608)           | -13.0%        |
| 18 Suncoast Workforce   | \$1,437,941         | \$1,176,296         | \$1,527,127                 | \$4,141,364                    | \$4,405,537                    | (\$264,173)           | -6.0%         |
| 19 Heartland Workforce  | \$496,702           | \$577,847           | \$389,639                   | \$1,464,188                    | \$1,712,657                    | (\$248,469)           | -14.5%        |
| 20 Workforce Solutions  | \$1,501,425         | \$1,351,998         | \$2,016,884                 | \$4,870,307                    | \$4,951,253                    | (\$80,946)            | -1.6%         |
| 21 Workforce Alliance, Inc.                                   | \$2,947,603         | \$2,891,189         | \$3,478,347                 | \$9,317,139                    | \$10,719,835                   | (\$1,402,696)         | -13.1%        |
| 22 WorkForce One  | \$3,769,433         | \$3,135,472         | \$4,281,751                 | \$11,186,656                   | \$13,245,223                   | (\$2,058,567)         | -15.5%        |
| 23 South Florida Workforce Investment Board                   | \$7,410,056         | \$7,382,674         | \$7,222,291                 | \$22,015,021                   | \$26,800,501                   | (\$4,785,480)         | -17.9%        |
| 24 Southwest Florida Works                                    | \$2,564,834         | \$2,349,589         | \$2,440,428                 | \$7,354,851                    | \$8,035,723                    | (\$680,872)           | -8.5%         |
| <b>STATEWIDE TOTALS</b>                                       | <b>\$44,955,588</b> | <b>\$45,401,755</b> | <b>\$46,976,563</b>         | <b>\$137,333,906</b>           | <b>\$156,046,170</b>           | <b>(\$18,712,264)</b> | <b>-12.0%</b> |

**Program Year 2013 Workforce Investment Act  
Adult Program Regional Workforce Board Formula Allocations**

| REGIONAL WORKFORCE BOARDS                                     | AREA OF SUBSTANTIAL UNEMPLOYMENT |                  |             |                | ECONOMICALLY DISADVANTAGED |                  | RWB SHARE          | HH * ALLOCATION     | PY 2013             | PY 2012              | DIFFERENCE    | % |
|---|----------------------------------|------------------|-------------|----------------|----------------------------|------------------|--------------------|---------------------|---------------------|----------------------|---------------|---|
|   | LABOR FORCE                      | UNEMPLOYED Total | Rate        | Excess         | Total                      | Excess           |                    |                     | FINAL ALLOCATION    | FINAL ALLOCATION     |               |   |
| 1 Workforce Escarosa, Inc.                                    | 211,770                          | 19,390           | 9.2%        | 9,860          | 37,565                     | 34,918           | 0.023645562        | \$1,063,000         | \$1,222,146         | (\$159,146)          | -13.0%        |   |
| 2 Workforce Development Board of Okaloosa and Walton Counties | 132,636                          | 8,848            | 6.7%        | 2,879          | 17,175                     | 15,517           | 0.009907058        | \$445,378           | \$510,128           | (\$64,750)           | -12.7%        |   |
| 3 Chipola Regional Workforce Development Board                | 50,526                           | 4,255            | 8.4%        | 1,981          | 22,405                     | 21,773           | 0.010489991        | \$471,584           | \$524,212           | (\$52,628)           | -10.0%        |   |
| 4 Gulf Coast Workforce Development Board                      | 102,481                          | 9,328            | 9.1%        | 4,716          | 17,705                     | 16,424           | 0.011352029        | \$510,337           | \$616,074           | (\$105,737)          | -17.2%        |   |
| 5 Workforce Plus  | 185,316                          | 14,666           | 7.9%        | 6,327          | 35,540                     | 33,224           | 0.019978527        | \$898,146           | \$889,475           | \$8,671              | 1.0%          |   |
| 6 North Florida Workforce Development Board                   | 50,529                           | 4,742            | 9.4%        | 2,468          | 15,390                     | 14,758           | 0.009056038        | \$407,120           | \$510,086           | (\$102,966)          | -20.2%        |   |
| 7 Florida Crown Workforce Board, Inc.                         | 50,238                           | 4,649            | 9.3%        | 2,388          | 14,815                     | 14,187           | 0.007898244        | \$355,072           | \$441,822           | (\$86,750)           | -19.6%        |   |
| 8 First Coast Workforce Development, Inc.                     | 725,497                          | 67,762           | 9.3%        | 35,115         | 98,835                     | 89,766           | 0.070620993        | \$3,174,808         | \$3,416,990         | (\$242,182)          | -7.1%         |   |
| 9 Alachua/Bradford FloridaWorks                               | 142,705                          | 10,636           | 7.5%        | 4,214          | 27,380                     | 25,596           | 0.014894265        | \$669,580           | \$782,893           | (\$113,313)          | -14.5%        |   |
| 10 Workforce Connection                                       | 206,192                          | 23,052           | 11.2%       | 13,773         | 46,225                     | 43,648           | 0.029842039        | \$1,341,566         | \$1,391,789         | (\$50,223)           | -3.6%         |   |
| 11 Center for Business Excellence                             | 286,847                          | 29,552           | 10.3%       | 16,644         | 43,265                     | 39,679           | 0.031595465        | \$1,420,393         | \$1,545,260         | (\$124,867)          | -8.1%         |   |
| 12 Workforce Central Florida                                  | 1,160,583                        | 109,963          | 9.5%        | 57,737         | 149,970                    | 135,463          | 0.111044874        | \$4,992,088         | \$5,184,153         | (\$192,065)          | -3.7%         |   |
| 13 Brevard Workforce  | 267,410                          | 27,758           | 10.4%       | 15,725         | 33,130                     | 29,787           | 0.026863648        | \$1,207,671         | \$1,271,826         | (\$64,155)           | -5.0%         |   |
| 14 WorkNet Pinellas   | 443,694                          | 42,245           | 9.5%        | 22,279         | 65,180                     | 59,634           | 0.045600680        | \$2,050,005         | \$2,396,158         | (\$346,153)          | -14.4%        |   |
| 15 Tampa Bay WorkForce Alliance, Inc.                         | 614,443                          | 58,620           | 9.5%        | 30,970         | 88,835                     | 81,154           | 0.062692608        | \$2,818,383         | \$3,050,311         | (\$231,928)          | -7.6%         |   |
| 16 Pasco-Hernando Workforce Board, Inc.                       | 256,073                          | 29,214           | 11.4%       | 17,691         | 44,040                     | 40,839           | 0.032402477        | \$1,456,672         | \$1,451,096         | \$5,576              | 0.4%          |   |
| 17 Polk County Workforce Development Board                    | 273,745                          | 29,356           | 10.7%       | 17,037         | 50,110                     | 46,688           | 0.034384844        | \$1,545,791         | \$1,581,704         | (\$35,913)           | -2.3%         |   |
| 18 Suncoast Workforce   | 301,447                          | 29,448           | 9.8%        | 15,883         | 45,445                     | 41,677           | 0.031985821        | \$1,437,941         | \$1,475,634         | (\$37,693)           | -2.6%         |   |
| 19 Heartland Workforce  | 71,228                           | 6,813            | 9.6%        | 3,608          | 20,175                     | 19,285           | 0.011048724        | \$496,702           | \$580,400           | (\$83,698)           | -14.4%        |   |
| 20 Workforce Solutions  | 270,632                          | 30,948           | 11.4%       | 18,770         | 44,180                     | 40,797           | 0.033397968        | \$1,501,425         | \$1,553,271         | (\$51,846)           | -3.3%         |   |
| 21 Workforce Alliance, Inc.                                   | 620,490                          | 61,264           | 9.9%        | 33,342         | 87,490                     | 79,734           | 0.065566998        | \$2,947,603         | \$3,568,908         | (\$621,305)          | -17.4%        |   |
| 22 WorkForce One  | 992,360                          | 83,505           | 8.4%        | 38,849         | 119,870                    | 107,466          | 0.083847938        | \$3,769,433         | \$4,451,455         | (\$682,022)          | -15.3%        |   |
| 23 South Florida Workforce Investment Board                   | 1,331,379                        | 133,040          | 10.0%       | 73,128         | 256,605                    | 239,963          | 0.164830586        | \$7,410,056         | \$9,566,555         | (\$2,156,499)        | -22.5%        |   |
| 24 Southwest Florida Works                                    | 524,665                          | 52,255           | 10.0%       | 28,645         | 80,745                     | 74,187           | 0.057052623        | \$2,564,834         | \$2,624,545         | (\$59,711)           | -2.3%         |   |
| <b>STATEWIDE TOTALS</b>                                       | <b>9,272,886</b>                 | <b>891,309</b>   | <b>9.6%</b> | <b>474,029</b> | <b>1,462,075</b>           | <b>1,346,164</b> | <b>1.000000000</b> | <b>\$44,955,588</b> | <b>\$50,606,891</b> | <b>(\$5,651,303)</b> | <b>-11.2%</b> |   |

**Program Year 2013 Workforce Investment Act  
Youth Program Regional Workforce Board Formula Allocations**

| REGIONAL WORKFORCE BOARDS                                   | AREA OF SUBSTANTIAL UNEMPLOYMENT |                  |             |                | ECONOMICALLY DISADVANTAGED |                | RWB SHARE          | HH * | PY 2013             | PY 2012             | DIFFERENCE           | %             |
|---|----------------------------------|------------------|-------------|----------------|----------------------------|----------------|--------------------|------|---------------------|---------------------|----------------------|---------------|
|   | LABOR FORCE                      | UNEMPLOYED Total | Rate        | Excess         | Total                      | Excess         |                    |      | FINAL ALLOCATION    | FINAL ALLOCATION    |                      |               |
| Workforce Escarosa, Inc.                                    | 211,770                          | 19,390           | 9.2%        | 9,860          | 8,925                      | 6,278          | 0.028470797        | *    | \$1,292,624         | \$1,631,426         | (\$338,802)          | -20.8%        |
| Workforce Development Board of Okaloosa and Walton Counties | 132,636                          | 8,848            | 6.7%        | 2,879          | 3,025                      | 1,367          | 0.008027979        |      | \$364,484           | \$422,575           | (\$58,091)           | -13.7%        |
| Chipola Regional Workforce Development Board                | 50,526                           | 4,255            | 8.4%        | 1,981          | 3,305                      | 2,673          | 0.008720231        |      | \$395,914           | \$400,768           | (\$4,854)            | -1.2%         |
| Gulf Coast Workforce Development Board                      | 102,481                          | 9,328            | 9.1%        | 4,716          | 3,365                      | 2,084          | 0.011707293        | *    | \$531,532           | \$642,728           | (\$111,196)          | -17.3%        |
| Workforce Plus  | 185,316                          | 14,666           | 7.9%        | 6,327          | 14,900                     | 12,584         | 0.037785101        |      | \$1,715,510         | \$1,168,844         | \$546,666            | 46.8%         |
| North Florida Workforce Development Board                   | 50,529                           | 4,742            | 9.4%        | 2,468          | 3,580                      | 2,948          | 0.009715022        |      | \$441,079           | \$518,021           | (\$76,942)           | -14.9%        |
| Florida Crown Workforce Board, Inc.                         | 50,238                           | 4,649            | 9.3%        | 2,388          | 3,335                      | 2,707          | 0.009088564        |      | \$412,637           | \$506,648           | (\$94,011)           | -18.6%        |
| First Coast Workforce Development, Inc.                     | 725,497                          | 67,762           | 9.3%        | 35,115         | 24,245                     | 15,176         | 0.075920859        |      | \$3,446,940         | \$3,442,775         | \$4,165              | 0.1%          |
| Alachua/Bradford FloridaWorks                               | 142,705                          | 10,636           | 7.5%        | 4,214          | 12,565                     | 10,781         | 0.031163487        |      | \$1,414,877         | \$1,072,721         | \$342,156            | 31.9%         |
| Workforce Connection  | 206,192                          | 23,052           | 11.2%       | 13,773         | 8,130                      | 5,553          | 0.027221174        |      | \$1,235,889         | \$1,279,874         | (\$43,985)           | -3.4%         |
| Center for Business Excellence                              | 286,847                          | 29,552           | 10.3%       | 16,644         | 9,220                      | 5,634          | 0.033716439        | *    | \$1,530,786         | \$1,920,398         | (\$389,612)          | -20.3%        |
| Workforce Central Florida                                   | 1,160,583                        | 109,963          | 9.5%        | 57,737         | 34,990                     | 20,483         | 0.113735161        |      | \$5,163,776         | \$5,509,188         | (\$345,412)          | -6.3%         |
| Brevard Workforce   | 267,410                          | 27,758           | 10.4%       | 15,725         | 6,140                      | 2,797          | 0.023479009        |      | \$1,065,988         | \$1,280,163         | (\$214,175)          | -16.7%        |
| WorkNet Pinellas  | 443,694                          | 42,245           | 9.5%        | 22,279         | 8,880                      | 3,334          | 0.033142150        |      | \$1,504,712         | \$1,851,260         | (\$346,548)          | -18.7%        |
| Tampa Bay WorkForce Alliance, Inc.                          | 614,443                          | 58,620           | 9.5%        | 30,970         | 22,075                     | 14,394         | 0.068786702        |      | \$3,123,037         | \$3,833,282         | (\$710,245)          | -18.5%        |
| Pasco-Hernando Workforce Board, Inc.                        | 256,073                          | 29,214           | 11.4%       | 17,691         | 7,990                      | 4,789          | 0.029316542        |      | \$1,331,022         | \$1,185,650         | \$145,372            | 12.3%         |
| Polk County Workforce Development Board                     | 273,745                          | 29,356           | 10.7%       | 17,037         | 10,475                     | 7,053          | 0.034489472        |      | \$1,565,883         | \$1,841,927         | (\$276,044)          | -15.0%        |
| Suncoast Workforce  | 301,447                          | 29,448           | 9.8%        | 15,883         | 7,255                      | 3,487          | 0.025908605        |      | \$1,176,296         | \$1,215,521         | (\$39,225)           | -3.2%         |
| Heartland Workforce   | 71,228                           | 6,813            | 9.6%        | 3,608          | 3,925                      | 3,035          | 0.012727407        | *    | \$577,847           | \$726,186           | (\$148,339)          | -20.4%        |
| Workforce Solutions   | 270,632                          | 30,948           | 11.4%       | 18,770         | 7,905                      | 4,522          | 0.029778543        |      | \$1,351,998         | \$1,536,081         | (\$184,083)          | -12.0%        |
| Workforce Alliance, Inc.                                    | 620,490                          | 61,264           | 9.9%        | 33,342         | 16,935                     | 9,179          | 0.063680107        | *    | \$2,891,189         | \$3,507,818         | (\$616,629)          | -17.6%        |
| WorkForce One   | 992,360                          | 83,505           | 8.4%        | 38,849         | 21,105                     | 8,701          | 0.069060589        |      | \$3,135,472         | \$3,642,547         | (\$507,075)          | -13.9%        |
| South Florida Workforce Investment Board                    | 1,331,379                        | 133,040          | 10.0%       | 73,128         | 41,130                     | 24,488         | 0.162607706        | *    | \$7,382,674         | \$9,600,070         | (\$2,217,396)        | -23.1%        |
| Southwest Florida Works                                     | 524,665                          | 52,255           | 10.0%       | 28,645         | 15,170                     | 8,612          | 0.051751061        |      | \$2,349,589         | \$2,461,048         | (\$111,459)          | -4.5%         |
| <b>STATEWIDE TOTALS</b>                                     | <b>9,272,886</b>                 | <b>891,309</b>   | <b>9.6%</b> | <b>474,029</b> | <b>298,570</b>             | <b>182,659</b> | <b>1.000000000</b> |      | <b>\$45,401,755</b> | <b>\$51,197,519</b> | <b>(\$5,795,764)</b> | <b>-11.3%</b> |

**Program Year 2013 Workforce Investment Act  
Dislocated Worker Program Regional Workforce Board Formula Allocations**

| REGIONAL WORKFORCE BOARDS                                   | 20%<br>UC<br>CLAIMANTS | 25%<br>UC<br>CONCENTRATION | 25%<br>MASS<br>LAYOFF | 30%<br>LONG-TERM<br>UNEMPLOYED | RWB SHARE          | PY 2013<br>FINAL<br>ALLOCATION | PY 2012<br>FINAL<br>ALLOCATION | DIFFERENCE           | %             |
|---|------------------------|----------------------------|-----------------------|--------------------------------|--------------------|--------------------------------|--------------------------------|----------------------|---------------|
| Workforce Escarosa, Inc.                                    | 2,383                  | 17,520                     | 605                   | 306                            | 0.023990974        | \$1,127,014                    | \$1,176,455                    | (\$49,441)           | -4.2%         |
| Workforce Development Board of Okaloosa and Walton Counties | 1,057                  | 7,975                      | 96                    | 131                            | 0.008164917        | \$383,560                      | \$487,561                      | (\$104,001)          | -21.3%        |
| Chipola Regional Workforce Development Board                | 495                    | 3,817                      | 128                   | 71                             | 0.005208901        | \$244,696                      | \$231,362                      | \$13,334             | 5.8%          |
| Gulf Coast Workforce Development Board                      | 1,220                  | 8,355                      | 359                   | 168                            | 0.013002259        | \$610,801                      | \$634,251                      | (\$23,450)           | -3.7%         |
| Workforce Plus  | 1,527                  | 13,461                     | 104                   | 240                            | 0.012839669        | \$603,164                      | \$746,505                      | (\$143,341)          | -19.2%        |
| North Florida Workforce Development Board                   | 568                    | 4,297                      | 96                    | 81                             | 0.005218789        | \$245,161                      | \$298,329                      | (\$53,168)           | -17.8%        |
| Florida Crown Workforce Board, Inc.                         | 487                    | 4,114                      | 27                    | 77                             | 0.003960103        | \$186,032                      | \$267,642                      | (\$81,610)           | -30.5%        |
| First Coast Workforce Development, Inc.                     | 8,905                  | 61,016                     | 3,037                 | 1,257                          | 0.101410476        | \$4,763,916                    | \$4,611,951                    | \$151,965            | 3.3%          |
| Alachua/Bradford FloridaWorks                               | 964                    | 9,759                      | 55                    | 146                            | 0.008243111        | \$387,233                      | \$496,605                      | (\$109,372)          | -22.0%        |
| Workforce Connection  | 2,543                  | 20,412                     | 157                   | 369                            | 0.019964446        | \$937,861                      | \$1,318,273                    | (\$380,412)          | -28.9%        |
| Center for Business Excellence                              | 3,684                  | 26,435                     | 498                   | 546                            | 0.032011331        | \$1,503,782                    | \$1,698,993                    | (\$195,211)          | -11.5%        |
| Workforce Central Florida                                   | 14,008                 | 99,320                     | 1,688                 | 2,074                          | 0.118384755        | \$5,561,309                    | \$7,024,295                    | (\$1,462,986)        | -20.8%        |
| Brevard Workforce   | 3,438                  | 24,746                     | 754                   | 545                            | 0.034667549        | \$1,628,562                    | \$2,407,327                    | (\$778,765)          | -32.3%        |
| WorkNet Pinellas  | 4,961                  | 37,628                     | 480                   | 711                            | 0.040576359        | \$1,906,138                    | \$2,473,449                    | (\$567,311)          | -22.9%        |
| Tampa Bay WorkForce Alliance, Inc.                          | 7,165                  | 53,389                     | 887                   | 1,021                          | 0.060955339        | \$2,863,472                    | \$3,566,156                    | (\$702,684)          | -19.7%        |
| Pasco-Hernando Workforce Board, Inc.                        | 3,401                  | 25,846                     | 229                   | 478                            | 0.026234874        | \$1,232,424                    | \$1,642,294                    | (\$409,870)          | -25.0%        |
| Polk County Workforce Development Board                     | 3,678                  | 26,542                     | 387                   | 551                            | 0.030546527        | \$1,434,971                    | \$1,799,622                    | (\$364,651)          | -20.3%        |
| Suncoast Workforce  | 3,205                  | 26,326                     | 744                   | 432                            | 0.032508283        | \$1,527,127                    | \$1,714,382                    | (\$187,255)          | -10.9%        |
| Heartland Workforce   | 875                    | 6,216                      | 173                   | 126                            | 0.008294319        | \$389,639                      | \$406,071                      | (\$16,432)           | -4.0%         |
| Workforce Solutions   | 4,203                  | 28,246                     | 1,063                 | 621                            | 0.042933826        | \$2,016,884                    | \$1,861,901                    | \$154,983            | 8.3%          |
| Workforce Alliance, Inc.                                    | 7,613                  | 55,831                     | 1,571                 | 1,118                          | 0.074044311        | \$3,478,347                    | \$3,643,109                    | (\$164,762)          | -4.5%         |
| WorkForce One   | 10,989                 | 75,388                     | 1,249                 | 1,634                          | 0.091146536        | \$4,281,751                    | \$5,151,221                    | (\$869,470)          | -16.9%        |
| South Florida Workforce Investment Board                    | 17,076                 | 122,956                    | 2,502                 | 2,665                          | 0.153742436        | \$7,222,291                    | \$7,633,876                    | (\$411,585)          | -5.4%         |
| Southwest Florida Works                                     | 6,231                  | 47,214                     | 681                   | 887                            | 0.051949910        | \$2,440,428                    | \$2,950,130                    | (\$509,702)          | -17.3%        |
| <b>STATEWIDE TOTALS</b>                                     | <b>110,676</b>         | <b>806,809</b>             | <b>17,570</b>         | <b>16,255</b>                  | <b>1.000000000</b> | <b>\$46,976,563</b>            | <b>\$54,241,760</b>            | <b>(\$7,265,197)</b> | <b>-13.4%</b> |



**Program Year 2013 Workforce Investment Act  
Supplemental Dislocated Worker Program Regional Workforce Board Formula Allocations**

| Regional Workforce Boards                                     | Share              | Total Supplemental Award |
|---|--------------------|--------------------------|
| 1 Workforce Escarosa, Inc.                                    | 0.023990974        | 239,910                  |
| 2 Workforce Development Board of Okaloosa and Walton Counties | 0.008164917        | 81,649                   |
| 3 Chipola Regional Workforce Development Board                | 0.005208901        | 52,089                   |
| 4 Gulf Coast Workforce Development Board                      | 0.013002259        | 130,023                  |
| 5 Workforce Plus  | 0.012839669        | 128,397                  |
| 6 North Florida Workforce Development Board                   | 0.005218789        | 52,188                   |
| 7 Florida Crown Workforce Board, Inc.                         | 0.003960103        | 39,602                   |
| 8 First Coast Workforce Development, Inc.                     | 0.101410476        | 1,014,105                |
| 9 Alachua/Bradford FloridaWorks                               | 0.008243111        | 82,431                   |
| 10 Workforce Connection                                       | 0.019964446        | 199,644                  |
| 11 Center for Business Excellence                             | 0.032011331        | 320,113                  |
| 12 Workforce Central Florida                                  | 0.118384755        | 1,183,848                |
| 13 Brevard Workforce  | 0.034667549        | 346,675                  |
| 14 WorkNet Pinellas   | 0.040576359        | 405,764                  |
| 15 Tampa Bay WorkForce Alliance, Inc.                         | 0.060955339        | 609,553                  |
| 16 Pasco-Hernando Workforce Board, Inc.                       | 0.026234874        | 262,349                  |
| 17 Polk County Workforce Development Board                    | 0.030546527        | 305,465                  |
| 18 Suncoast Workforce   | 0.032508283        | 325,083                  |
| 19 Heartland Workforce  | 0.008294319        | 82,943                   |
| 20 Workforce Solutions  | 0.042933826        | 429,338                  |
| 21 Workforce Alliance, Inc.                                   | 0.074044311        | 740,443                  |
| 22 WorkForce One  | 0.091146536        | 911,465                  |
| 23 South Florida Workforce Investment Board                   | 0.153742436        | 1,537,424                |
| 24 Southwest Florida Works                                    | 0.051949910        | 519,499                  |
| <b>STATEWIDE TOTALS</b>                                       | <b>1.000000000</b> | <b>10,000,000</b>        |

# Action Item 1, Continued

## TEMPORARY ASSISTANCE FOR NEEDY FAMILIES (TANF)

\* \* \* \* \*

**STATE APPROPRIATIONS FISCAL YEAR 2013/14 – \$59,653,991 (Prior Year 2012/13 \$74,633,837; decrease of \$14,979,846 or 20.07%)**

The 2012 Legislature has authorized the following appropriations of TANF funding for use in the workforce system:

|  | <u>FY 2012/13</u> | <u>FY 2013/14</u> |
|--|-------------------|-------------------|
| <b>TANF – State Level Administration &amp; Initiatives:</b>              |                   |                   |
| DEO and Board Administration   | \$4,062,421       | \$4,223,084       |
| <b>TANF – Regional:</b>  |                   |                   |
| Regional Allocations, Council Initiatives,<br>and Performance Incentives | \$ 70,571,416     | \$55,430,907      |
| Non-Custodial Parent Program   | 1,416,000         | 1,416,000         |

**BASIC PURPOSE AND ELIGIBILITY:** TANF replaced the former Aid to Families with Dependent Children (AFDC) and serves low-income families with children, including two-parent families. The TANF program strongly emphasizes a “Work First” philosophy, combining time limits and sanctions with added assistance in obtaining needed training, starting work, receiving childcare, transportation and transitional supports to retain employment, advance, and become self-sufficient.

**SPECIFIC MANDATES/LIMITATIONS:** Eligibility limits for receiving temporary cash assistance (TCA) benefits are fairly complex and rigid and include not only having a gross income equal to or less than 185% of federal poverty level but also limited assets. Services/programs that assist families in avoiding welfare dependency by gaining and retaining employment are available in the form of one-time payments, job placement assistance and transitional work support services and can be more broadly extended to “needy families” (set at 200% of poverty level in Florida). Also there are other diversion programs designed to reduce and/or prevent welfare dependency, such as teen pregnancy prevention programs, programs that enable the formation and maintenance of two-parent families and post-employment career advancement and job retention programs. Florida is required to provide matching state general revenue funds to satisfy the federal “maintenance of effort” (MOE). TANF funds may not be used for medical expenses, undocumented immigrants or convicted felons. TANF funds, which are unspent at the local level within specified time limits, are restricted to “benefits only” and can no longer be used for other purposes such as workforce and support services.

**DISTRIBUTION MECHANISMS:** TANF funds are provided to the State by federal block grants with some special supplements provided to Florida and other states. There are no federally established formulas for sub-state distribution of TANF funds, noting that TANF administration in most states is state or county-based, with no decentralized governance/delivery structures similar to Florida’s regional workforce boards (RWBs). The Florida Legislature defines and approves the yearly appropriation of TANF funds to the Department and the Board to address the state and regional needs, which are further administered, allocated and directed by the State Board.

**State-Level Initiatives for Fiscal Year 2013/14** - As in prior fiscal years, the 2013 Florida Legislature provided TANF funds for program and administrative support for the Department of Economic Opportunity and the Workforce Florida Board. For fiscal year 2013/14, the Legislature has appropriated a total of **\$4,223,084** for these purposes.

**Regional Boards’ Grants and Aids and Specific Legislative Proviso** -

A total of **\$55,430,907** in TANF funds was appropriated by the 2013 Legislature for all other purposes. This amount includes a specific appropriation of \$750,000 for the Non-custodial Parent Program (NCP) for Pinellas, Pasco and Hillsborough counties, to be administered by WorkNet Pinellas and an additional \$666,000 to continue Gulf Coast Community Care’s current non-custodial program in Miami-Dade. After deducting the **\$1,416,000** for the Non-custodial Parent Program, the remaining amount available for regional allocation is **\$54,014,907**, a reduction of \$15,140,509 from the prior year.

The 2013 Legislature retained the specific language in proviso that requires the Workforce Florida Board to maximize funds distributed directly to the regional boards with an equitable distribution of funds to the boards based on anticipated client caseload and the achievement of performance standards. Allocation factors previously approved by the Board to allocate funds to the 24 regions meet this mandate in law regarding the anticipated client caseload, so staff is proposing no modification at this time. Updated actual numbers for both factors for the calendar year 2012 were obtained and used to calculate the regional distribution. The determination of the total amount proposed for distribution to the regions is shown as follows:

|   | <b><u>FY 2013/14</u></b> |
|---|--------------------------|
| <b>Total TANF Workforce Services Appropriation</b>          | <b>\$55,430,907</b>      |
| Less: Non-Custodial Parent Allocation                       | <u>-1,416,000</u>        |
| <b>Balance of Appropriation for Distribution to Regions</b> | <b>\$54,014,907</b>      |

The proposed allocation of these appropriations is designed to maximize the amounts allocated via direct allocation factors that are based upon client caseload. Additionally, this allocation plan incorporates the required distributions defined in the appropriations act, proviso, or accompanying implementing bill. As instructed by proviso language, a portion of these funds must be distributed to the regions based upon achieved performance. Further, all funds distributed under this proposed plan, including the Non-Custodial initiatives will be based upon actual achieved

performance outcomes.

**Regional TANF Distributions for Fiscal Year 2013/14 -**

Since incorporation of Workforce Florida in July 2000 and the merger of the State WAGES Board, the WFI Board has transitioned the historical TANF/Welfare Transition allocation formula (based only on the cash assistance caseload) to a 50/50 allocation formula – 50% of the available funds are allocated to the regional boards based upon their share of the number of children within households receiving food stamps and the remaining one-half based upon cash assistance caseload, or TANF households with an Adult member. The data on numbers of children receiving food stamps and the cash assistance caseload are readily available from Department of Children and Families.

In calculating prior year distributions, the Board applied an 80% “***Hold Harmless***” provision to ensure that no region would face an inordinate shift or reduction of funds from the prior fiscal year due to shifts in data used in the funding methodology. However, based on the total reduction exceeding the 20% level, applying the 80% hold-harmless calculation to the current year allocation would serve no purpose. Therefore, staff is recommending utilizing the same hold harmless provision required under the WIA Adult and Youth programs, which calculates a two-year average percentage for each region and assures they will not receive less than 90% of that average.

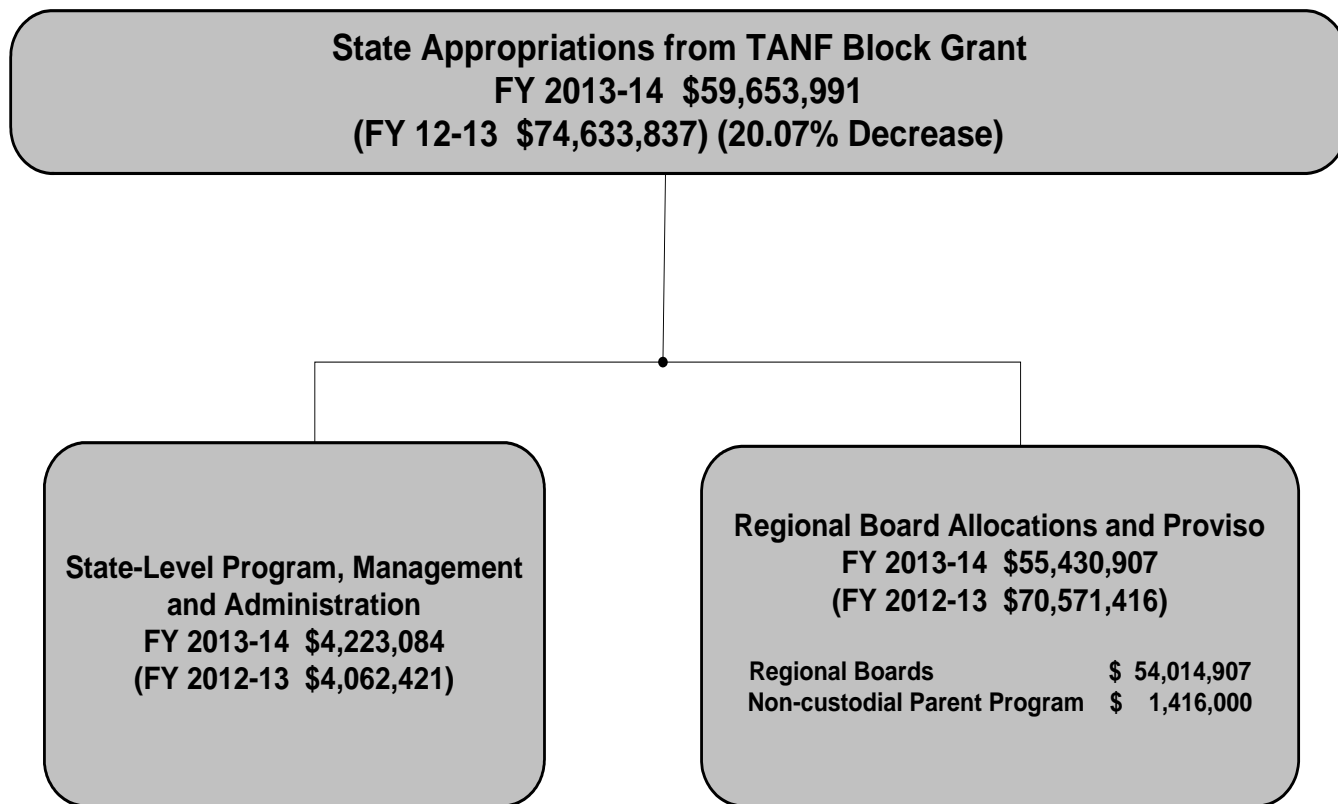
Using these amounts and assuming no additional changes in the allocation methodology, the total amounts by region are reflected on the attached chart entitled “***Calculation of Regional TANF Funding Distributions Fiscal Year 2013/14.***”

\* \* \* \* \*

**NEEDED ACTION**

**Approval of the allocation methodology as proposed for the distribution of TANF funding for fiscal year 2013/14.**

## FLORIDA FUNDING FOR Temporary Assistance for Needy Families (TANF)



**CALCULATION OF REGIONAL TANF PLANNING ALLOCATIONS Fiscal Year 2013/14  
With Comparisons to Fiscal Year 2012/13**

|    | REGIONAL WORKFORCE BOARDS                                   | 50% SNAP         | 50% WELFARE CASELOAD | RWB SHARE          | HH * | FY 2013/14 FINAL ALLOCATION | FY 2012/13 FINAL ALLOCATION | DIFFERENCE            | %             |
|----|---|------------------|----------------------|--------------------|------|-----------------------------|-----------------------------|-----------------------|---------------|
| 1  | Workforce Escarosa, Inc.                                    | 182,161          | 4,128                | 0.024220810        | *    | \$1,308,285                 | \$1,657,310                 | (\$349,025)           | -21.1%        |
| 2  | Workforce Development Board of Okaloosa and Walton Counties | 72,895           | 1,145                | 0.007298634        |      | \$394,235                   | \$444,500                   | (\$50,265)            | -11.3%        |
| 3  | Chipola Regional Workforce Development Board                | 54,320           | 646                  | 0.004902613        |      | \$264,814                   | \$304,049                   | (\$39,235)            | -12.9%        |
| 4  | Gulf Coast Workforce Development Board                      | 88,123           | 1,380                | 0.008812489        |      | \$476,006                   | \$587,072                   | (\$111,066)           | -18.9%        |
| 5  | Workforce Plus  | 135,599          | 4,546                | 0.019828244        |      | \$1,071,021                 | \$1,390,346                 | (\$319,325)           | -23.0%        |
| 6  | North Florida Workforce Development Board                   | 60,398           | 975                  | 0.006271892        | *    | \$338,776                   | \$429,916                   | (\$91,140)            | -21.2%        |
| 7  | Florida Crown Workforce Board, Inc.                         | 57,748           | 1,770                | 0.008014760        |      | \$432,917                   | \$608,379                   | (\$175,462)           | -28.8%        |
| 8  | First Coast Workforce Development, Inc.                     | 597,799          | 19,717               | 0.086575033        |      | \$4,676,342                 | \$5,699,949                 | (\$1,023,607)         | -18.0%        |
| 9  | Alachua/Bradford FloridaWorks                               | 94,484           | 1,777                | 0.010218063        |      | \$551,928                   | \$722,937                   | (\$171,009)           | -23.7%        |
| 10 | Workforce Connection  | 230,558          | 4,333                | 0.024925635        |      | \$1,346,356                 | \$1,714,448                 | (\$368,092)           | -21.5%        |
| 11 | Center for Business Excellence                              | 237,609          | 7,572                | 0.033725644        |      | \$1,821,688                 | \$2,252,311                 | (\$430,623)           | -19.1%        |
| 12 | Workforce Central Florida                                   | 1,049,157        | 21,121               | 0.117056158        |      | \$6,322,777                 | \$7,108,516                 | (\$785,739)           | -11.1%        |
| 13 | Brevard Workforce   | 185,775          | 3,477                | 0.020046965        |      | \$1,082,835                 | \$1,371,794                 | (\$288,959)           | -21.1%        |
| 14 | WorkNet Pinellas  | 310,915          | 8,682                | 0.040958166        |      | \$2,212,352                 | \$3,039,169                 | (\$826,817)           | -27.2%        |
| 15 | Tampa Bay WorkForce Alliance, Inc.                          | 636,421          | 18,954               | 0.093888150        | *    | \$5,071,360                 | \$6,679,166                 | (\$1,607,806)         | -24.1%        |
| 16 | Pasco-Hernando Workforce Board, Inc.                        | 255,992          | 6,048                | 0.030875933        |      | \$1,667,761                 | \$2,133,162                 | (\$465,401)           | -21.8%        |
| 17 | Polk County Workforce Development Board                     | 307,845          | 8,581                | 0.040514224        |      | \$2,188,372                 | \$2,703,666                 | (\$515,294)           | -19.1%        |
| 18 | Suncoast Workforce  | 236,308          | 8,663                | 0.036471110        |      | \$1,969,984                 | \$2,074,207                 | (\$104,223)           | -5.0%         |
| 19 | Heartland Workforce   | 84,546           | 675                  | 0.006775599        |      | \$365,983                   | \$470,069                   | (\$104,086)           | -22.1%        |
| 20 | Workforce Solutions   | 241,739          | 5,670                | 0.029050076        |      | \$1,569,137                 | \$2,197,487                 | (\$628,350)           | -28.6%        |
| 21 | Workforce Alliance, Inc.                                    | 467,160          | 5,663                | 0.042440825        |      | \$2,292,437                 | \$3,123,575                 | (\$831,138)           | -26.6%        |
| 22 | WorkForce One   | 685,535          | 13,953               | 0.076880114        |      | \$4,152,672                 | \$5,238,330                 | (\$1,085,658)         | -20.7%        |
| 23 | South Florida Workforce Investment Board                    | 1,477,888        | 34,340               | 0.189147594        | *    | \$10,216,788                | \$14,483,486                | (\$4,266,698)         | -29.5%        |
| 24 | Southwest Florida Works                                     | 467,781          | 5,131                | 0.041101269        |      | \$2,220,081                 | \$2,721,572                 | (\$501,491)           | -18.4%        |
|    | <b>STATEWIDE TOTALS</b>                                     | <b>8,218,756</b> | <b>188,947</b>       | <b>1.000000000</b> |      | <b>\$54,014,907</b>         | <b>\$69,155,416</b>         | <b>(\$15,140,509)</b> | <b>-21.9%</b> |
|    | *Indicates 90% Hold Harmless in Effect                      |                  |                      |                    |      |                             |                             |                       |               |

# Action Item 1, Continued

## WAGNER-PEYSER (W-P)

\*\*\*\*\*

**FEDERAL AWARD FY 2013-14 FOR WAGNER-PEYSER - \$ 38,965,509**  
*(Prior Year 2012-13 \$41,597,929)*

**Statutory Reference:** Wagner-Peyser Act of 1933, 48 Stat.113 as amended, Public Law 105-220; Workforce Investment Act of 1998.

**Grantor Agency:** United States Department of Labor (USDOL)

**Grant Program Objectives:** To place persons in employment by providing a variety of placement-related services without charge to job seekers and to employers seeking qualified individuals to fill job openings.

### **Description of the Grant Program:**

The Wagner-Peyser Act of 1933 established a nationwide system of public employment offices known as the Employment Service. The Wagner-Peyser Act was amended by the Workforce Investment Act of 1998 making the Employment Service part of the One Stop delivery system. Employment services are an integral part of the One Stop delivery system that provides an integrated array of high-quality services so that workers, job seekers and businesses can find the services they need under one roof in easy-to-reach locations. Employment services include a variety of services related to a labor exchange system including job search assistance, referral and placement assistance to job seekers, reemployment services to unemployment insurance claimants, and recruitment services to employers with job openings. Services may be delivered through self-service, facilitated self-help services and staff assisted services. Also available may be core services, such as an assessment of skill levels, abilities and aptitudes; career guidance when appropriate; job search workshops; and referral to training as appropriate. The services offered to employers, in addition to referral of job seekers to job openings, include matching job requirements with job seeker experience, skills and other attributes, helping with special recruitment needs, assisting employers analyze hard-to-fill job orders, assisting with job restructuring and helping employers deal with layoffs.

### **Description of Process used to Allocate Available Grant Funds:**

**Wagner-Peyser 7(a) Funds** – As shown on the chart, Workforce Florida and the Department of Economic Opportunity reserve less than 10% of the 7(a) grant funds (\$1,855,623) for state-level administration. Over 90 percent (\$33,213,335) of these funds are available to support local one-stop program services at the local level.

The allocation of Wagner-Peyser funding to local boards is based on the federal formula used to distribute grant funds among the states. The formula is:

- 2/3 based on the relative share of the state’s Civilian Labor Force (based on an annualized average)
- 1/3 based on the relative share of the state’s number of unemployed individuals (based on an annualized average)

|   |                   |
|---|-------------------|
| <b>Total PY 2013 WP 7(a)</b>                    | <b>35,068,958</b> |
| RWB Salaries and Pass-Through                   | (29,568,155)      |
| Geographic Solutions Job Bank                   | (3,397,852)       |
| RWB Insurance and HR Fees                       | (247,328)         |
| <b>Remaining for State-Level Administration</b> | <b>1,855,623</b>  |

**Wagner-Peyser 7(b) Funds** - Section 7(b) of the Wagner-Peyser Act reserves 10% (or \$3,896,551) of the available grant funds allocated to Florida (\$38,965,509) for use by this board for state-level activities including special projects and performance incentives. The remaining grant funds are available for additional eligible activities.

|   |                  |
|---|------------------|
| <b>Total PY 2012 WP 7(b)</b>                | <b>3,896,551</b> |
| Plus Est. Bal. of Unreserved W-P 7(b) Funds | 3,934,817        |
| <b>Total WP 7(b) Funds Available</b>        | <b>7,831,368</b> |

The following recommendations are presented to the Board for the establishment of reserves and commitments for incentives and business outreach efforts for fiscal year 2012/13.

**Regional Performance Incentives (\$2,000,000)** - The current performance incentive policy relies heavily on formula-based calculations, which results in a large portion of the funds being distributed based on the size of the region, rather than on the performance of the region. The August Board meeting will be focused on performance and efficiency, and will include a staff recommendation on a more performance based incentive policy. Once approved, these funds would be released pursuant to positive performance outcomes achieved by regional boards as defined within the Board’s new performance incentive policy and approved by the Governor.

**Integrated Communications - Workforce Florida and Statewide (\$1,250,000)** - Each year Workforce Florida’s Board of Directors approves funding administered by its professional staff to advance the mission and outreach of the organization and system through integrated communications. This investment supports Workforce Florida-led efforts in public relations, media relations, public affairs, social media and advertising, among others. The funding for this line item is primarily used to develop and deliver a statewide, multimedia outreach campaign via advertising placements, which is critical — especially in a state as large and diverse as Florida — to increasing awareness and use of the resources available statewide to address the employment and training needs of job seekers, workers and employers. One million dollars is customarily invested in statewide advertising buys to support and leverage the state brand. Outreach funding for media buys also is used to support cooperative advertising opportunities between Workforce Florida and



regional workforce boards to enhance collaboration and leverage state and regional investments. While the current state brand is Employ Florida, statewide advertising investments during the 2013-2014 fiscal year will transition to the new unified statewide brand. A portion of the funds designated for statewide advertising will be available directly to regional workforce boards that choose to participate in the 2013-2014 co-op advertising program. Over time, this brand transition will allow for greater outreach efficiencies among the state and regional workforce boards and enhance opportunities to leverage valuable communications outreach resources. The remaining \$250,000 is designated for use by Workforce Florida to cover the costs of professional services and products needed to respond to integrated communications priorities and needs of the statewide organization. Currently, through a competitively procured agreement, Moore Communications Group provides a range of support services to Workforce Florida including, but not limited to, media relations, public relations, strategic communications, content creation, graphic design, digital media outreach and advertising. This funding request represents a continuation of resources to maintain statewide advertising and essential integrated communications support services for Workforce Florida.

**Youth Outreach Efforts – Florida Trend NEXT (\$260,000)** - Consistent with Workforce Florida’s priority for talent pipeline development and specifically youth outreach, Florida Trend’s NEXT magazine continues to serve as an outstanding tool to inform and educate Florida youth (ages 15-18) about career, education and training opportunities available to them in the Sunshine State. Workforce Florida is the annual sponsor of the publication, which is written about and for Florida students. Workforce Florida’s support enables distribution to 200,000 high school students and allows the state workforce system to directly inform Florida students about the Employ Florida Marketplace at EmployFlorida.com and other resources available to assist them in their career preparation and job search efforts. Florida Trend’s print-run includes 4,800 copies for distribution through Florida’s 24 Regional Workforce Boards and their One-Stop Career Centers. For its investment, Workforce Florida also receives advertising on the FloridaTrend.com websites and its main monthly business publication, Florida Trend magazine.

**Other Business Outreach Initiatives (\$500,000)** - Staff recommends approval for sustained funding for a variety of initiatives under the broad category of business outreach. These uses are consistent with both state law priorities under Chapter 445 as they relate to facilitating business awareness and access to workers from special population groups (e.g., youth, veterans, elders, disabled) as well as by addressing workforce needs in targeted industry sector groups. Three major initiatives are included in this fund reserve:

- Population / Client-Specific Initiatives including the Strengthening Youth Partnerships / Federal Shared Youth Vision continuation and Special Population Group Events & Milestones for Veterans, Elders, Disabled, TANF eligible, Faith Based Organizations (FBO’s), Community Based Organizations (CBOs), etc;
- Target Industry Sector Specific Initiatives to support industries identified as economic development priorities for Florida as well as infrastructure industries, consistent with the five-year state strategic plan for workforce development, Creating the Strategy for Today’s Needs and Tomorrow’s Talent, and Florida’s State Plan for Workforce Investment Act and Wagner-Peyser Act Programs; and

- Other Business Outreach Activities including, but not limited to, the Annual Workforce Summit, Rural RWB / EDO / Chamber Events, Workforce Services Tool Kit Workshops and Business Liaisons Workshops.

**Military Family Employment Advocacy Program (\$702,045) –**

The Military Family Employment Advocacy Program (MFEAP) was established by Section 445.055, F.S., to provide employment advocates and services at Florida's One-Stop Career Centers, in Regions where high military populations associated with military bases, are located. Persons eligible for assistance through this program include spouses and dependents of active-duty military personnel, activated National Guard members, and activated military reservists' located in Florida.

Prior to fiscal year 2008/09, General Revenue (GR) funds were appropriated for this program; however, GR funds have not been appropriated since that time. As a result, WFI has allocated Wagner-Peyser 7(b) funds to Regions 1, 2, 4, 8, 13, 15, and 23 to keep this highly successful program operational. There are approximately 49,000 military spouses, including spouses of mobilized National Guard Members, who currently reside in Florida and 60 percent of them live in these Regional Workforce Board (RWB) areas.

Eight Military Family Employment Program Advocates are currently assigned to One-Stop Career Centers in Pensacola, Ft. Walton Beach, Panama City, Jacksonville, Cocoa, Tamp Bay and Miami/Dade cities. The MFEAP Advocates' main focus is to assist active-duty military spouses and dependents in obtaining and retaining gainful employment. Many of the Advocates are co-located at the military base's Family Support Centers. Advocates frequently participate in welcome events and briefings for newly stationed families as well as area job fairs held throughout the region.

Specific services provided by the Military Family Employment Advocacy Program include, but are not limited to, job search assistance, placement assistance, career planning and counseling, case management, resume assistance, assessment and testing services, interviewing skills training, referral to educational and training programs, job fairs, and job clubs. In conjunction with each Region's Business Services Center, services are also provided to employers seeking to hire military family members. These services include on-site visits with employers, referring applicants and resumes to employers and delivering employment packages to prospective employers.

**Performance** - A significant number of military family members have been served by staff that is funded through this program. The chart below shows the five-year success of the program, noting that in 2012/13, performance is only available for a nine-month period at this time.

| Program Year (PY)   | # Participants Served | # Participant Services | # Employer Services | Entered Employment Rate          |
|---|-----------------------|------------------------|---------------------|----------------------------------|
| 2008-2009   | 9,081                 | 227,139                | 3,042               | 50 %                             |
| 2009-2010   | 11,927                | 240,024                | 3,953               | 49 %                             |
| 2010-2011   | 11,749                | 187,539                | 4,182               | 51 %                             |
| 2011-2012   | 11,401                | 188,241                | 1,796               | 52 %                             |
| 2012-2013<br>(performance data from 1 July 2012 to 30 March 2013) | 10,693                | 138,450                | 1,266               | 55 %<br>(only Q1 data available) |

Recent program efforts by the State MFEAP Program Coordinator:

- Since October 2012 Regions 4 and 8 have received on-site guidance and technical assistance;
- MFEAP website critiqued and updated for increased visibility and access;
- Frequently Asked Questions have been drafted and are being added to the MFEAP website;
- Quarterly performance reports are being developed to send to each MFEAP Advocate and Regional Program Manager to assist them in monitoring program performance; and
- New partnerships are being established with the National Military Spouse Network and Transitional Assistance Online for expanded outreach.

The success of the program is particularly notable given the challenges faced by military family members such as frequent relocations, recurring deployments, and lengthy periods of separation during times of conflict. This situation, coupled with the realization that some employers are interested in employees who can make long-term employment commitments, reduces the availability of employment opportunities for military family members. Despite these obstacles, the MFEAP has been very successful in helping military family members obtain employment. The addition last year of a state program coordinator has been a tremendous benefit to the program in providing statewide leadership and coordination, training and technical assistance, replication of best practices, implementation of program performance reports, and expanded program outreach.

It is therefore recommended that funding for the Military Family Employment Advocacy Program be continued in fiscal year 2013/14 to assist military spouses and other eligible family members in obtaining gainful employment. This employment helps to improve the quality of life and financial health of Florida military families as well as Florida's communities and employers. Accordingly, the DEO requests **\$702,045** in Wagner-Peyser 7(b) funds to continue the program for the period July 1, 2013, to June 30, 2014. Funding in the amount of **\$644,980** is recommended for Regions 1, 2, 4, 8, 13 and 23, which are now participating in the program and where the highest number of military populations is highest. These regions will receive the same allocation of funds as provided to them in fiscal year 2012/13. The remaining **\$57,065** will be used to support the State MFEAP Coordinator position and associated expenses.

**Florida Workforce System Branding Initiative (\$3,000,000)** - Through its development and implementation of a unified statewide brand for its public workforce system, Florida has an opportunity to lead the nation by aligning its state board, 24 regional workforce boards and one-stop career centers around a single identity. Required by the Regional Workforce Boards Accountability Act that took effect on July 1, 2012, to develop a unified brand strategy, the goal is to develop a single, common brand that conveys and supports a comprehensive, unified and aligned system of world-class services for job seekers, workers and businesses.

Brand strategy development began this fiscal year, as Workforce Florida embarked on a transparent and inclusive statewide process, driven by market research, which engaged about 1,000 workforce system leaders, staff and stakeholders including Florida consumers and employers. The external research found a significant lack of awareness and understanding of the Florida Workforce System with its myriad individual brands in the marketplace. Further, vivid and consistent misperceptions are limiting the ability of the system to grow its user base among both consumers and employers. For example, among Florida employers, 78 percent have at least a degree of name awareness of one or more workforce entities, but only 26 percent indicate they are knowledgeable about the system. Among job seekers and workers, 72 percent express name awareness, but only 42 percent indicate knowledge of workforce system entities such as the one-stop career center or regional workforce boards in their communities, the Employ Florida Marketplace at [EmployFlorida.com](http://EmployFlorida.com), Workforce Florida or the Florida Department of Economic Opportunity. This lack of knowledge not only underscores the need for a unified brand, but also represents a tremendous opportunity for growth and improvement for the workforce system. Furthermore, research findings demonstrate, Florida's demand-driven workforce system, which is committed to improvements in efficiency and effectiveness, has a transformational opportunity to deliver a market-driven and customer-focused solution for improving awareness, recognition and use of resources to address the workforce development needs of Floridians and businesses.

Internal systemwide research and engagement found overwhelming support for a unified workforce brand strategy for Florida was clear and strong at every level, from front-line professionals to executive and volunteer board leadership. Consistently, among internal stakeholders at the regional level, the need for state support for transition costs was identified as a top priority and essential to effective and timely implementation of a unified brand strategy. Any implementation of a new brand inherently comes with upfront transition costs. Investments in implementation of a unified brand for Florida's workforce system are investments in the system's long-term future and viability to deliver efficiencies and better position the system to leverage resources, particularly for business outreach essential to system effectiveness. To support recommendations for unified brand identity and the implementation of a universal brand beginning in 2013-2014 fiscal year, Workforce Florida staff recommends the following:

- \$1,500,000 - *Branding Implementation Funding/Regional Workforce Boards Transition* – This funding would be provided as a direct allocation to the 24 local boards to assist with local implementation costs associated with the transition to a new brand identity such as signage, business stationary, collaterals and printed materials, websites and local outreach. Guidance would be developed to ensure appropriate expenditure of these funds. The level of state-support funding is based on regional size. The proposed distribution method is shown below.

| <b>Grouping</b> | <b>Amount of Allocation</b> | <b>Total for Group</b> | <b>Percentage for Group</b> |
|-----------------|-----------------------------|------------------------|-----------------------------|
| Group 1         | 47,500                      | 380,000                | 25%                         |
| Group 2         | 62,500                      | 500,000                | 33%                         |
| Group 3         | 77,500                      | 620,000                | 41%                         |
|                 |                             | <b>1,500,000</b>       | <b>100%</b>                 |

Group 1 – Regions 2, 3, 4, 5, 6, 6, 8, 19  
Group 2 – Regions 1, 10, 11, 13, 16, 17, 18, 20  
Group 3 – Regions 8, 12, 14, 15, 21, 22, 23, 24

- \$500,000 - *Branding Implementation Funding/Statewide Transition* – This funding would be retained and managed by Workforce Florida and directed to costs associated with assisting the entire workforce system with the transition. With the launch of a new brand, there are many needs and recommendations that will be identified in the implementation plan for the new unified identity that must be addressed prior to, during and following a public rollout. Workforce Florida — with lead assistance from the consulting team supporting this project, IDEAS of Orlando, as well as assistance from the Branding Advisory Panel made up of leaders from regional workforce boards, including chief executives, communications directors and business liaisons, and a leader from the Department of Economic Opportunity — is developing a statewide implementation plan to facilitate the transition and ensure *consistency* in branding. This funding will assist with transition costs and primarily with establishing a statewide toolkit of resources for use by and to benefit the entire system such as media kit templates, locally customizable collaterals for job seekers and employers, website templates, portal access to branding resources for workforce system partners, outreach videos, brand transition and launch message development, brand rollout planning and the development and execution of a plan to facilitate statewide internal brand training to position the new brand for long-term success by ensuring at every level workforce system leaders, staff and stakeholders understand the unified brand charter and deliver the brand experience needed to reflect and reinforce the Florida system’s culture and commitment to excellence.
- \$1,000,000 - *Branding Performance Incentive Funding/Regional Workforce Boards* – By allocating a portion of the Regional Performance Incentives funding based on performance metrics essential to implementation of the new unified brand, the Workforce Florida Board will help to ensure timely implementation of this initiative, which is a state priority. The funding in this category will be distributed among those regional boards that meet or exceed branding performance criteria to be set through future policy by the Workforce Florida Board. At the discretion of qualifying regional workforce boards, these funds could be used to address local brand transition and local outreach needs or directed to other needs as appropriate for performance incentive funding.

**Wagner-Peyser 7(b) Funding Summary -**

In the event the foregoing reserves and commitments are approved by the Board, an estimated

balance of **\$119,323** will remain available to the Board to fund other initiatives and projects during the course of the year. Please note that this amount is estimated due to the fact that certain current year funds may be required to be expended before the close out of fiscal year 2012/13 and may not be available for carry-forward purposes.

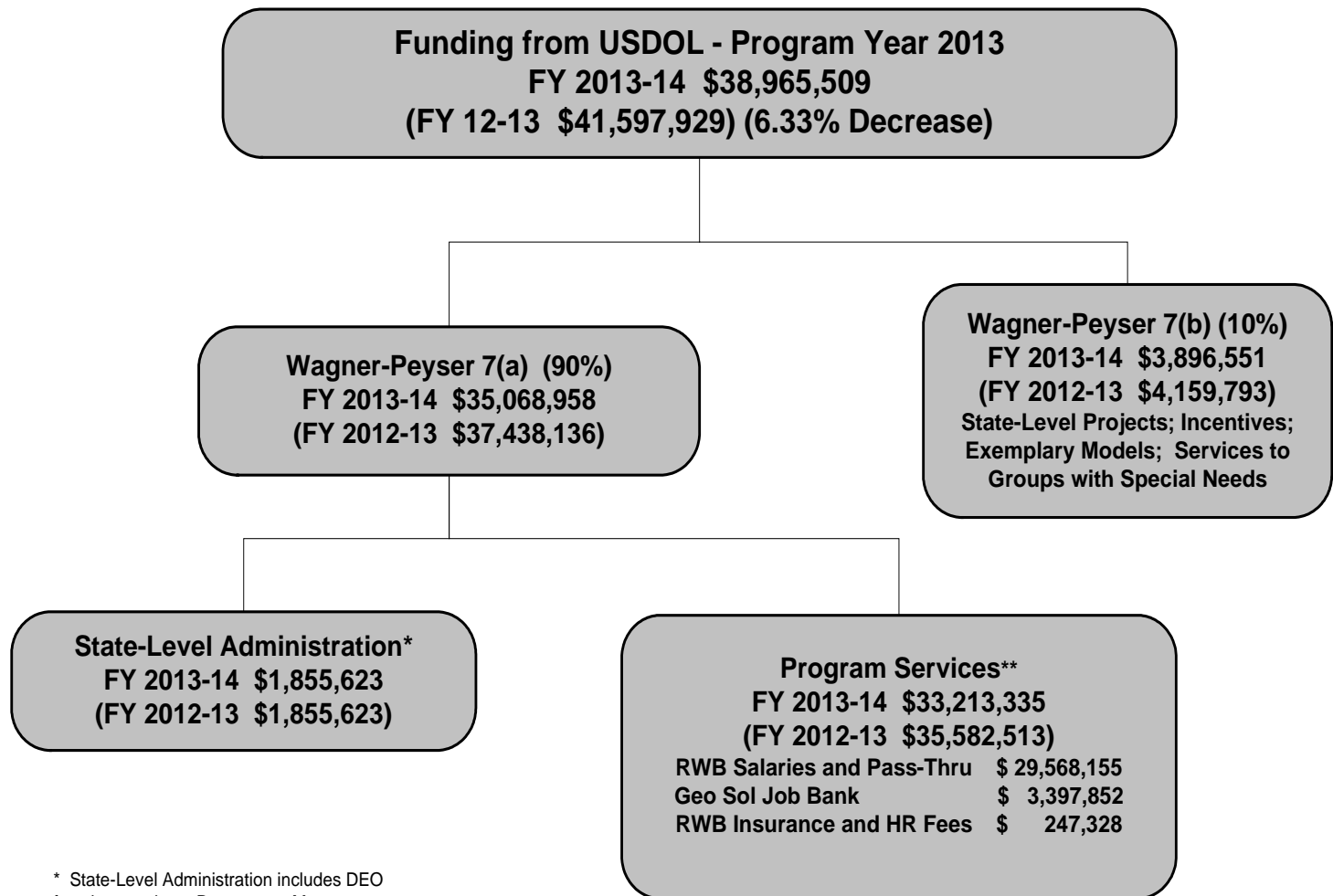
|   |                  |
|---|------------------|
| <b>Total 2013/14 WIA Funds Available</b>              | <b>7,831,368</b> |
| <b>Less Proposed Discretionary Board Allocations:</b> |                  |
| Regional Performance Incentives                       | (2,000,000)      |
| Integrated Communications - Statewide Outreach        | (1,250,000)      |
| Other Business Outreach                               | (500,000)        |
| DEO Funding Request for Military Spouse Program       | (57,065)         |
| RWB for Military Spouse Program                       | (644,980)        |
| Florida Next & Career Connections                     | (260,000)        |
| Regional Branding Implementation                      | (1,500,000)      |
| Regional Branding Performance Incentives              | (1,000,000)      |
| Statewide Branding Implementation                     | (500,000)        |
| <b>Balance Remaining for State Projects</b>           | <b>119,323</b>   |

\* \* \* \* \*

**NEEDED ACTION**

**Approval of the regional Wagner-Peyser 7(a) fund allocations and 7(b) state-level activities for state fiscal year 2013/14.**

## FLORIDA FUNDING FOR WAGNER-PEYSER



\* State-Level Administration includes DEO functions such as: Department Management; Financial Management; Grant Management; Compliance Monitoring; etc. for a total of \$1,664,962. An additional \$190,661 is reserved for WFI costs associated with this program. These operations are being supported with WIA State Level funds.

\*\* Program Operations, such as training and technical assistance; participant and performance tracking; planning and policy development; and some Labor Market Statistics services, are being supported with WIA State Level funds.

**Program Year 2013 Wagner-Peyser Act  
Regional Workforce Board Formula Allocations**

| REGIONAL WORKFORCE BOARDS |   | 2/3                        | 1/3                       | RWB SHARE          | PY 2013             | PY 2012             | DIFFERENCE           | %            |
|---------------------------|---|----------------------------|---------------------------|--------------------|---------------------|---------------------|----------------------|--------------|
|                           |   | CIVILIAN<br>LABOR<br>FORCE | UNEMPLOYED<br>INDIVIDUALS |                    | FINAL<br>ALLOCATION | FINAL<br>ALLOCATION |                      |              |
| 1                         | Workforce Escarosa, Inc.                                    | 215,126                    | 17,520                    | 0.022546850        | \$666,669           | \$713,773           | (\$47,104)           | -6.6%        |
| 2                         | Workforce Development Board of Okaloosa and Walton Counties | 131,426                    | 7,975                     | 0.012647203        | \$373,954           | \$403,002           | (\$29,048)           | -7.2%        |
| 3                         | Chipola Regional Workforce Development Board                | 49,653                     | 3,817                     | 0.005110323        | \$151,103           | \$164,452           | (\$13,349)           | -8.1%        |
| 4                         | Gulf Coast Workforce Development Board                      | 101,964                    | 8,355                     | 0.010707672        | \$316,606           | \$345,349           | (\$28,743)           | -8.3%        |
| 5                         | Workforce Plus  | 181,487                    | 13,461                    | 0.018476108        | \$546,304           | \$590,414           | (\$44,110)           | -7.5%        |
| 6                         | North Florida Workforce Development Board                   | 49,842                     | 4,297                     | 0.005322085        | \$157,364           | \$169,835           | (\$12,471)           | -7.3%        |
| 7                         | Florida Crown Workforce Board, Inc.                         | 49,578                     | 4,114                     | 0.005227692        | \$154,573           | \$169,002           | (\$14,429)           | -8.5%        |
| 8                         | First Coast Workforce Development, Inc.                     | 727,339                    | 61,016                    | 0.076966528        | \$2,275,758         | \$2,453,348         | (\$177,590)          | -7.2%        |
| 9                         | Alachua/Bradford FloridaWorks                               | 146,066                    | 9,759                     | 0.014426052        | \$426,552           | \$447,826           | (\$21,274)           | -4.8%        |
| 10                        | Workforce Connection  | 206,838                    | 20,412                    | 0.023151903        | \$684,559           | \$745,350           | (\$60,791)           | -8.2%        |
| 11                        | Center for Business Excellence                              | 288,037                    | 26,435                    | 0.031418462        | \$928,986           | \$1,007,430         | (\$78,444)           | -7.8%        |
| 12                        | Workforce Central Florida                                   | 1,183,876                  | 99,320                    | 0.125279203        | \$3,704,275         | \$3,946,415         | (\$242,140)          | -6.1%        |
| 13                        | Brevard Workforce   | 268,281                    | 24,746                    | 0.029314806        | \$866,785           | \$932,613           | (\$65,828)           | -7.1%        |
| 14                        | WorkNet Pinellas  | 441,416                    | 37,628                    | 0.046957368        | \$1,388,443         | \$1,509,382         | (\$120,939)          | -8.0%        |
| 15                        | Tampa Bay WorkForce Alliance, Inc.                          | 629,444                    | 53,389                    | 0.066849182        | \$1,976,607         | \$2,093,998         | (\$117,391)          | -5.6%        |
| 16                        | Pasco-Hernando Workforce Board, Inc.                        | 254,567                    | 25,846                    | 0.028793377        | \$851,367           | \$924,226           | (\$72,859)           | -7.9%        |
| 17                        | Polk County Workforce Development Board                     | 271,538                    | 26,542                    | 0.030288594        | \$895,578           | \$971,273           | (\$75,695)           | -7.8%        |
| 18                        | Suncoast Workforce  | 305,212                    | 26,326                    | 0.032595609        | \$963,792           | \$1,040,112         | (\$76,320)           | -7.3%        |
| 19                        | Heartland Workforce   | 67,142                     | 6,216                     | 0.007345995        | \$217,208           | \$240,536           | (\$23,328)           | -9.7%        |
| 20                        | Workforce Solutions   | 272,374                    | 28,246                    | 0.031052092        | \$918,153           | \$984,032           | (\$65,879)           | -6.7%        |
| 21                        | Workforce Alliance, Inc.                                    | 634,732                    | 55,831                    | 0.068234391        | \$2,017,565         | \$2,138,982         | (\$121,417)          | -5.7%        |
| 22                        | WorkForce One   | 1,015,805                  | 75,388                    | 0.103431687        | \$3,058,284         | \$3,249,404         | (\$191,120)          | -5.9%        |
| 23                        | South Florida Workforce Investment Board                    | 1,347,570                  | 122,956                   | 0.146692957        | \$4,337,440         | \$4,575,815         | (\$238,375)          | -5.2%        |
| 24                        | Southwest Florida Works                                     | 529,190                    | 47,214                    | 0.057163861        | \$1,690,230         | \$1,820,288         | (\$130,058)          | -7.1%        |
| <b>STATEWIDE TOTALS</b>   |   | <b>9,368,503</b>           | <b>806,809</b>            | <b>1.000000000</b> | <b>\$29,568,155</b> | <b>\$31,636,857</b> | <b>(\$2,068,702)</b> | <b>-6.5%</b> |



# Action Item 1, continued

## COMBINED VETERANS PROGRAMS (DVOP and LVER)

\* \* \* \* \*

**ESTIMATED FEDERAL AWARD FY 2013-14 FOR DVOP and LVER - \$ 11,988,384**  
*(Prior Year 2012-13 \$10,906,487)*

**Statutory Reference:** Jobs for Veterans Act (Public Law 107-288); Title 38, United States Code (USC), Chapters 41-42, as amended by the Jobs for Veterans Act (Public Law 107-288); Title 38, USC, Chapter 31; Servicemen's Readjustment Act of 1944.

**Grantor Agency:** United States Department of Labor (USDOL)

**Grant Program Objectives:** To develop jobs and job training opportunities for disabled and other veterans through contacts with employers; promote and develop on-the-job training and apprenticeship and other on-the-job training positions within federal job training (e.g. Veterans Workforce Investment Program, Veterans Affairs programs); provide outreach to veterans through all community agencies and organizations; provide assistance to community-based groups and organizations and appropriate grantees under other federal and federally funded employment and training programs; develop linkages with other agencies to promote maximum employment opportunities for veterans; and to provide employability development and vocational guidance to eligible veterans, especially disabled veterans, utilizing a case-management approach to services, wherever applicable. To provide job development, placement, and support services directly to veterans and to ensure that there is local supervision of State Employment Agencies compliance with federal regulations, performance standards, and grant agreement provisions in carrying out requirements of 38 U.S.C. 4104 in providing veterans with maximum employment and training opportunities.

**Description and Limitations of the Grant Program:** Funds must be used only for salaries and expenses and reasonable support of Veterans staff who shall be assigned only those duties directly related to meeting the employment needs of eligible veterans according to the provisions of 38 U.S.C. 4103A.

**Description of Process used to Allocate Available Grant Funds:**

Funding for this program is expected to exceed the local requirements for this year. The allocation methodology of Disabled Veterans Outreach Program/Local Veterans Employment Representative funds to the regional workforce is therefore based on the staffing cost needs of each board for approved DVOP/LVER positions and related costs to support these positions. Local boards may request additional positions or pass-through funding through the DEO program office.

As needed, the Department will reallocate any funding initially reserved for future use, state level operations, or for a workforce board (whether the workforce board voluntarily de-obligates funding or is subject to the de-obligation policy) to other allowable uses within the program.

The Department reserves available grant funds for state-level administration and statewide training. One percent of the total DVOP/LVER grant award to the state must be spent for performance incentives and is therefore reserved for that purpose. Funding to designated boards for Vocational Rehabilitation and Employment Program (VR&E) and the Incarcerated Veteran's Training Program (IVT), as negotiated by DEO with the US Department of Labor, will be included in those board's DVOP/LVER annual awards.

\* \* \* \* \*

**NEEDED ACTION**

**Approval of the state and regional DVOP and LVER allocation methodology for state fiscal year 2013/14 with authority given to Department and Board staff to reallocate available funds between the Department and workforce regions as needed.**

# Action Item 1, continued

## SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM EMPLOYMENT & TRAINING PROGRAM (SNAP E&T)

(Formerly known as Food Stamp Employment & Training Program - FSET)

\* \* \* \* \*

**ESTIMATED FEDERAL AWARD FY 2013/14 FOR SNAP E&T PROGRAM - \$9,693,115**

*(Prior Year 2012/13 \$9,611,103)*

**Statutory Reference:** Food Stamp Act of 1977, as amended, Section 16, Public Law 95-113, 91 Stat. 958, 7 U.S.C. 2025; Public Law 99-198, Public Law 105-33, Public Law 105-185.

**Grantor Agency:** US Department of Agriculture (USDA)

**Grant Program Objectives:** To provide federal financial aid to State agencies for costs incurred to operate Employment and Training Program for Food Stamp recipients. The Department of Children and Families is the State's recipient of federal grant funds for the Food Stamp Program. The Department of Economic Opportunity operates the SNAP E&T Program directly for USDA.

**Description and Limitations of the Grant Program:** By April 1, 1987, all states were to implement a Food Stamp Employment Training (E&T) Program as mandated by Public Law 99-198. The state agency is responsible for reimbursing participants for expenses incurred in fulfilling E&T requirements. Expenditures that may be included in this category are transportation, dependent care, books or training manuals, uniforms or other special equipment that a participant must have for participation, and any other necessary and reasonable cost that a participant incurs. **Participant reimbursements must not be paid for with the 100 percent Federal grant, or the 50 percent matched administrative cost funding.** State E&T Plans are not approvable unless FNS receives assurance that participant reimbursement funds are available. The Balanced Budget Act (Public Law 105-33) provides additional funding for grants to states (which do not require a state match) for work/training programs generally targeted for non-working able-bodied adults without dependents. Public Law 105-185 reduced these funds.

**Description of Process used to Allocate Available Grant Funds:**

The SNAP E&T Program operates on the federal fiscal year and a new state plan is needed for the new federal year that will begin October 1, 2013. Due to past high unemployment rates, the State received a waiver to exempt all counties from mandatory participation in this program, also known as "waived state" status until September 30, 2013. Beginning October 1, 2013, Florida will be required to again operate this program on a mandatory participation basis.

Florida will continue operation of the program under the “waived state” status until September 30, 2013. Staff recommends approval of delegation of authority to WFI and DEO staff to approve SNAP E&T allocations to those boards electing to operate the program on a volunteer basis during that time. Under a “waived state” status, all boards have the option to participate and will be funded if they so choose. It is further recommended that WFI and DEO staff be given the authority to establish a need-based formula to allocate available funding to those RWBs that choose to participate, and the additional authority to maximize the utilization of funds through the de-obligation and reallocation of fund between regional workforce boards and the Department.

For the October 1, 2013, to June 30, 2014, period, Florida will be required to operate the program on a mandatory basis. The individual counties and boards that must operate the program under the mandatory status are not yet finalized and will depend on Florida’s Supplemental Nutritional Assistance Program (SNAP) revised state plan. This action is being managed by the Florida Department of Children and Families and is expected to be completed before the next WFI board meeting in August. An action item to address allocation of SNAP E&T funds to local boards participating in the mandatory program is expected to be presented at that meeting.

\* \* \* \* \*

**NEEDED ACTION**

**Approve the delegation of authority to WFI and DEO staff to formally approve the SNAP E&T Program allocation of funding for the period July 1, 2013 through September 30, 2013, to those boards electing to operate the program, and authorize WFI and DEO staff to make funding shifts between workforce boards and the Department to maximize utilization of available SNAP E&T funds during the year.**

# Action Item 1, Continued

## REEMPLOYMENT ASSISTANCE (RA) SERVICES

\* \* \* \* \*

**FEDERAL AWARD FOR RA Services - FY Year 2013/14 - \$3,500,000**  
*(Prior Year 2012/13 - \$3,500,000)*

**Statutory Reference:** Social Security Act, as amended, 42 U.S.C. 501- 504, 1101-1109; Trade Act of 1974, as amended, Public Law 93-618, 88 Stat. 2024, 19 U.S.C. 2311; Federal Unemployment Tax Act, as amended, 26 U.S.C. 3404 note; Federal Employees and Ex-Service Members, 5 U.S.C. 8501 and 8521; Robert T. Stafford Disaster Relief and Emergency Assistance Act, as amended, Public Law 100-707, 88 Stat. 153, 42 U.S.C. 5171.

**Grantor Agency:** United States Department of Labor (USDOL)

**Grant Program Objectives:** To administer the State's program of unemployment insurance for eligible workers through Federal and State cooperation; to administer payment of trade adjustment assistance; disaster unemployment assistance; unemployment compensation for federal employees and ex-service members.

**Description and Limitations of the Grant Program:**

Funds are provided to support local one-stop center staff that assist customers file Reemployment Assistance initial and continuing claims via the State's internet system.

**Description of Process used to Allocate Available Grant Funds:**

Funds are directly distributed to the regional workforce boards based on the following work-based formula:

- 100% based on the relative share of the State's number of RA claims (based on an annualized average)

Staff recommends that the Department and Board staff be given the authority to reallocate any of the funding initially reserved for a workforce board that no longer needs the funding to other boards in need of additional resources.

\* \* \* \* \*

### NEEDED ACTION

**Approval of the regional Reemployment Assistance Services fund allocations for state fiscal year 2013/14 with authority given to Department and Board staff to reallocate such funds between workforce regions as needed.**

# Action Item 1, Continued

## APPROVAL OF WORKFORCE FLORIDA OPERATING BUDGET For Fiscal Year 2013/14

\* \* \* \* \*

The operating budget being proposed for Workforce Florida for fiscal year 2013/14 represents a continuation budget based upon actual costs incurred during the prior fiscal year. Unlike other discretionary awards made by the WFI Board, funding is appropriated by the Florida Legislature to Workforce Florida for operations, which is drawn via quarterly cash requests or through the submission of reimbursement invoices. This 2013/14 proposed budget reflects:

- An across-the-board salary increase appropriated by the Legislature to take effect on October 1, 2013. The approved plan allows for an increase of \$1,400 for employees with a base rate of pay of \$40,000 or less and an increase of \$1,000 for employees with a base rate of pay greater than \$40,000.
- Based upon the existing authority provided in the appropriations bills and contingent upon the total overall budget being recommended, management would ask for the flexibility to address disparities in pay or to realign salaries commensurate with and based upon results of the efficiency study and personnel management assessments initiatives that might be undertaken during fiscal year 2014. This flexibility will also be critical in addressing the need for a staff continuity plan since several key management staff will be retiring in the next year or two.
- Various changes to expense categories as detailed in the attached notes;
- Availability of certified forward funding will not be known until financial statements are closed, and is only estimated at this time.

Staff request the authority to move budgeted amounts around as needed to cover any actual deficits, but will remain within the overall budget as approved by the Board.

**IWT and ORT Training Programs** - The proposed program budgets for the Incumbent Worker Training (IWT) and Quick Response Training (QRT) programs funded by Federal Workforce Investment Act funds and state funds respectively are defined in the current state appropriations and substantive legislation. Funding appropriated in the General Appropriations Act for the 2013/14 fiscal year totaled **\$12,000,000**. Funding for the Incumbent Worker Training Program represents the recurring WIA funding of **\$2,000,000** as required by Section 445.003(3)(a)2, F.S. and does not incorporate any additional allocations of funding that might be considered by the Finance and Efficiency Council and Board.

\* \* \* \* \*

**Needed Action**

**To approve the operating and program budgets for Workforce Florida and to authorize the President and Treasurer the flexibility to adjust actual spending categories as necessary within the total approved budget.**

**WORKFORCE FLORIDA APPROVED OPERATIONAL BUDGET**  
**Fiscal Year 2013/2014**

**Board, Management, and Operations:**

| Description   |  | FY 2012/13<br>Budget | FY 2013/14<br>Budget | Difference       |
|---------------|--|----------------------|----------------------|------------------|
| <i>(Ref.)</i> | <b>Anticipated Revenues:</b>                 |                      |                      |                  |
| 1             | Workforce Operations - Federal               | \$ 2,393,070         | \$ 2,397,861         | \$ 4,791         |
|               | WIA IWT Administration                       | 171,200              | 171,200              | \$ -             |
|               | Certified Forward Funding (est)              | 250,000              | 250,000              | \$ -             |
| 2             | State Funds (P&I and GR)                     | 532,436              | 561,051              | \$ 28,615        |
|               |  | -                    | -                    | \$ -             |
|               | <b>Total Funds Available</b>                 | <b>\$ 3,346,706</b>  | <b>\$ 3,380,112</b>  | <b>\$ 33,406</b> |
|               | <b>Projected Expenditures:</b>               |                      |                      |                  |
| 3             | Total Salaries and Benefits                  | \$ 2,393,477         | \$ 2,414,877         | 21,400           |
|               | <b>Total Salaries and Benefits</b>           | <b>\$ 2,393,477</b>  | <b>\$ 2,414,877</b>  | <b>\$ 21,400</b> |
|               | <b>Recurring Expenses:</b>                   |                      |                      |                  |
|               | Supplies, Office Expenses, Repair            | 50,000               | 50,000               | -                |
|               | Printing                                     | 2,000                | 2,000                | -                |
|               | Dues & Subscriptions                         | 20,000               | 20,000               | -                |
|               | Utilities & Janitorial                       | 33,000               | 33,000               | -                |
|               | Training & Registrations                     | 10,000               | 10,000               | -                |
|               | Miscellaneous                                | 32,515               | 32,515               | -                |
| 4             | Administration Contracts                     | 125,000              | 125,000              | -                |
| 5             | Professional Fees & Consultants              | 40,000               | 73,406               | 33,406           |
|               | Audit Costs                                  | 32,000               | 32,000               | -                |
|               | Insurances - Directors/Officers              | 20,000               | 20,000               | -                |
|               | Rent   | 163,590              | 163,590              | -                |
|               | Equipment Rental-Copier, Postal              | 8,000                | 8,000                | -                |
|               | Postage/Freight                              | 7,000                | 7,000                | -                |
|               | Telephone/Communications/T1 Lines            | 40,200               | 40,200               | -                |
|               | Travel                                       | 78,000               | 78,000               | -                |
| 6             | Board / Summit Costs, including Board Travel | \$ 75,000            | \$ 75,000            | \$ -             |
| 7             | Reserve for Certified Forward Funding        | 196,924              | 175,524              | (21,400)         |
|               | <b>Total Recurring Expenses</b>              | <b>\$ 933,229</b>    | <b>\$ 945,235</b>    | <b>\$ 12,006</b> |
|               | <b>Non-Recurring Expenses:</b>               |                      |                      |                  |
| 8             | Equipment /Software Replacement              | \$ 20,000            | \$ 20,000            | -                |
|               | <b>Total Non-Recurring Expenses</b>          | <b>\$ 20,000</b>     | <b>\$ 20,000</b>     | <b>\$ -</b>      |
|               | <b>Total Anticipated Expenditures</b>        | <b>\$ 3,346,706</b>  | <b>\$ 3,380,112</b>  | <b>\$ 33,406</b> |
|               | <b>Balance of Funds Available</b>            | <b>\$ -</b>          | <b>\$ -</b>          | <b>\$ -</b>      |

See attached notes



## Notes Relative to Proposed Workforce Florida Operating Budget

**The approval of the operating budget reflects approval of anticipated revenues and expenses. It would not prohibit staff from reassigning resources among cost categories.**

1. Revenues available to Workforce Florida were determined by the Florida Legislature, and are comprised of state funds, WIA, TANF, and Wagner Peyser funds. The amount estimated for certified forward funding from fiscal year 2012/13 will not be known until close-out of the fiscal year and is estimated as \$250,000 at this time. Once finalized, this amount will be adjusted on the approved budget for FY 2013/14.
2. The increase in projected revenue from State funds includes a general revenue appropriation in substantive legislation to fund a requirement for Workforce Florida, Inc. to provide support to the Employer-Sponsored Benefits Study Task Force (HB 655).
3. The proposed expenditure level for salaries and benefits reflects current staffing levels with an across the board increase approved in the general appropriations act. In addition, management requests flexibility to adjust salaries with the implementation of the Efficiency Review and Performance Management.
4. Administrative contracts include projections of costs for human resources, payroll processing, accounting, legal assistance, and information systems.
5. Professional fees are being projected at a higher level than last year in order to be able to provide the support needed for the Employer-Sponsored Benefits Study Task Force (HB 655).
6. Board costs reflect costs for hosting the Board meetings, council and committee meetings, including a projection for member travel.
7. Due to the difficulty in determining what the balance will be at the end of June 2013, an estimate is shown at this time. Once the amount is available, the actual total will be reflected as budgeted revenue. The amount is projected lower than the previous year by the projected increase in salaries and benefits due to the across-the-board increase approved in the general appropriations act.
8. Equipment/Software replacement costs allow for potential upgrades of system equipment and for unforeseen problems relating to such equipment. It is being projected at the same level as last year.

## **Action Item 2**

### **POLK WORKS REQUEST FOR DESIGNATION AS A DIRECT PROVIDER OF WIA YOUTH SERVICES**

\* \* \* \* \*

Section 445.007(6), Florida Statutes, states that a regional workforce board may be designated as a one-stop operator and direct provider of intake, assessment, eligibility determinations, or other direct provider services except training services. Further, it states that Workforce Florida, Inc., shall establish procedures by which a regional workforce board may request permission to operate under this section and the criteria under which such permission may be granted. The criteria shall include, but need not be limited to, a reduction in the cost of providing the permitted services. Such permission shall be granted for a period not to exceed 3 years for any single request submitted by the regional workforce board.

Polk Works has requested designation beginning July 1, 2013, to directly provide Workforce Investment Act (WIA) Youth services through staff located in Youth sites throughout Polk. Polk Works has contracted out its Youth Services Program for nearly 10 years. As mandated by law, these services must be competitively procured every three years. Their current provider contract ends June 30, 2013. In accordance with policies and procedures, this is the year that Polk Works would issue a Request for Proposals. This request is to allow Polk Works to seek the approval of Workforce Florida to bring services in-house for a one year period (trial basis) instead of issuing an RFP this year.

\* \* \* \* \*

#### **NEEDED ACTION**

**To approve the request by Polk Works for designation as a direct provider of WIA Youth services for a one-year period beginning July 1, 2013 through June 30, 2014.**



Chris Hart, President  
Workforce Florida, Inc.  
1580 Waldo Palmer Lane, Suite 1  
Tallahassee, FL 32308-5430

Dear Mr. Hart,

With the passing of Senate Bill 428 which modifies Chapter 445 of the Florida Statutes, the Polk County Workforce Development Board, Inc., d.b.a. Polk Works formally requests permission to be designated as a direct provider of WIA Youth Services.

Upon approval of our request, please accept the following modifications to be incorporated into our 2012-2016 Workforce Services Plan. These modifications reflect changes to Chapter 445.007 (6), Florida Statutes and the change in our local service delivery.

- 1. A description of the revised “business model” that the Board has elected to follow and a description of the particular workforce service the regional workforce board wants to directly provide and how that service will be delivered. This will include a reference to those items in the two-year plan that would change if the request is approved, as well as revised Organization Chart reflecting the proposed new structure and delivery model (page numbers, etc.).**

Beginning July 1, 2013, Polk Works will directly provide Workforce Investment Act (WIA) Youth services through staff located in Youth sites throughout Polk. The Leadership Team will include the CEO, the Vice President of Operations, the Vice President of Finance, and the Contract Managers for One-Stop Services and Business Services.

Our recently approved Workforce Services Plan would change to reflect the new provider of Youth services as being Polk Works and an overview of staffing of the Youth Services program would be included. No other revisions are warranted.

- 2. The effective date for when the regional workforce board will provide the service. Include a description of any transitional period needed to ensure continuity in the delivery of the service to the regions workforce customers.**

If our request is approved, Polk Works will begin operating as the provider of Youth Services on July 1, 2013 which marks the end of the current Youth Service Providers contract. This will allow a four-month period of transition.

- 3. A description of the reasons why the regional workforce board has decided to directly provide the workforce services.**

#### **Background**

Polk Works has contracted out its Youth Services Program for nearly 10 years. As mandated by law, these services must be competitively procured every three years. Our current provider contract

ends June 30, 2013. In accordance with policies and procedures, this is the year that Polk Works would issue a Request for Proposals. The request is to allow Polk Works to seek the approval of Workforce Florida to bring services in-house for a one year period (trial basis) instead of issuing an RFP this year.

The 2010 Census data for Polk indicates that we have approximately 59,912 youth (ages 15 – 24) in our region. Over the past several years, we have contracted with a service provider to provide youth services. The contracts for services over the past 6 years have been as follows:

| Program Year   | Contract Value | In/Out of School Youth Served(New) | Total |
|----------------|----------------|------------------------------------|-------|
| PY 2007 - 2008 | \$767,486      | 70/130                             | 200   |
| PY 2008 – 2009 | \$767,001      | 50/120                             | 170   |
| PY 2009 – 2010 | \$773,739      | 70/130                             | 200   |
| PY 2010 – 2011 | \$876,472      | 72/133                             | 195   |
| PY 2011 – 2012 | \$848,424      | 80/120                             | 200   |
| PY 2012 – 2013 | \$989,293      | 95/125                             | 220   |

Youth services are currently provided at four locations; Winter Haven, Lakeland, Haines City and Lake Wales. Polk Works covers all facility costs associated with each location. As Polk Works’ staff began to prepare for procurement process, there was hesitation to continue the pattern of what we have been doing over the last 10 years. It is the belief of the staff that we need to streamline processes, assess accountability and enhance services levels while expanding service territories. The goal over the PY2013-2014 year would be to do the following.

- Increase the number of youth being served throughout Polk County. The goal would be the serve a minimum of 300-350 new youth over the program year.
- Expand service territories and market penetration. We will work to partner with community organizations to expand territories to at least 4 additional areas in Polk.
- Polk Works recognizes the need to streamline services as well as reduce costs in order to meet the increasing needs of Polk County Youth. Providing services in house will eliminate positions deemed duplicative, cut staffing related costs and eliminate provider overhead and profit.

Instead of having front line staff with multiple layers of oversight, the staff, will be given more direct lines of communication.

**4. A description of how the regional workforce board will establish a “firewall” that clearly separates and defines their existing role as the oversight body for the workforce region’s workforce delivery system from their new role as the managing board of directors for those operational services that the Board has chosen to directly provide.**

Management - A Youth Services Program Manager and two (2) Area Managers will provide the direct supervision and be responsible for the day-to-day operations and performance outcomes

of Youth Services. The Program Manager will report to the Leadership Team monthly and to the Youth Council quarterly to review the system and make necessary changes to improve services to customers.

Oversight – The Leadership Team will include the CEO, the Vice President of Operations, the Vice President of Finance, the Contract Managers for One-Stop Services and Business Services. Through this Leadership Team, the Youth Council and Board will set goals for Youth Services. A system of individual performance standards and objectives is being implemented to ensure organizational goals will be met. Members of the Leadership Team and any Polk Works staff involved in writing policy will not be involved in the delivery of Youth services. The Youth Council and the Board will provide oversight of the local workforce system and ensure appropriate reviews and monitoring of Youth activities. Programs are also monitored four times per year by the Board’s monitoring contractor. In addition to the Monthly Management Reports, the Leadership Team will use the Program Manager’s reports on local office peer reviews and data from Board staff-generated reports and other ad-hoc reports to analyze performance.

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

- Workforce Investment Act (WIA) Youth

**6. The estimated cost of the service and the results of a cost analysis that documents the expected reduction in costs if the regional workforce board provided the service rather than contracting that service to another provider.**

Polk Works will realize a reduction in administrative and overhead costs by providing Youth services. Overhead and profit costs charged to Polk Works by the contracted WIA Youth service providers can be estimated by reviewing last year’s expenses.

The new focus of the Polk Works Youth Program will:

- Eliminate the Line of business (LOB) General & Administration (G&A) of 11.29%
- Decrease fringe from 38.5% to 25.48%
- Eliminate Profit of 8.5%
- Eliminate Audit costs of .005% of the entire contract value
- Eliminate Professional Service & Support Staff Salaries (corporate staff not based in Polk County) of \$40,561

Polk Works will continue to pay all facility related expenses including rent, utilities, security and janitorial services.

**7. A description of any other anticipated improvement to service delivery and performance outcomes.**

Youth services are currently provided at four locations; Winter Haven, Lakeland, Haines City and Lake Wales. Polk Works covers all facility costs associated with each location. As Polk Works’

staff began to prepare for procurement process, there was hesitation to continue the pattern of what we have been doing over the last 10 years. It is the belief of the staff that we need to streamline processes, assess accountability and enhance services levels while expanding service territories. The goal over the PY2013-2014 year would be to do the following.

- Increase the number of youth being served throughout Polk County. The goal would be to serve a minimum of 350 new youth over the program year.
- Expand service territories and market penetration. We will work to partner with community organizations to expand territories to at least 4 additional areas in Polk.
- Polk Works recognizes the need to streamline services as well as reduce costs in order to meet the increasing needs of Polk County Youth. Providing services in house will eliminate positions deemed duplicative, cut staffing related costs and eliminate provider overhead and profit.

Instead of having front line staff with multiple layers of oversight, the staff, will be given more direct lines of communication.

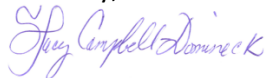
**8. Documentation that the public was provided at least 30 days notice to review and comment on the proposed change in service delivery (include any submitted comments).**

On November 8, 2012, the Polk Works Executive Committee reviewed and approved the request to provide Youth Services and moved it forward to our Full Board. On November 15, the Polk Works Full Board approved the request to allow staff to move forward with a formal request. On January 24, 2013, a draft of this request for permission to be designated as a direct provider of Youth services was made available on our website at [www.polkworks.org](http://www.polkworks.org) under Contact Us – Public Notices along with a Notice for Public Comment.

**9. Documentation that the Chief Elected Official has agreed to the planned change in service delivery. See enclosed Signature Page.**

If any additional information is needed, please feel free to contact me at (863) 508-1600.

Sincerely,



Stacy Campbell-Domineck

## Statement of Intent

RWB Number: 17

Contact Name: Stacy Campbell-Domienck

Contact Phone Number: (863) 508-1600

### AMENDMENT TO THE 2012 – 2016 LOCAL WORKFORCE SERVICES PLAN

This amendment authorizes designation of a regional workforce board as a direct provider of Youth services by agreement of the chief elected official and the Governor.

No amendment to the Region 17 2012 – 2016 Local Workforce Service Plan needed at this time  
STOP HERE - NO FURTHER ACTION NEEDED

The Region 17, Polk County Workforce Development Board, Inc. 2012 – 2016 Local Workforce Service Plan will be amended to include designation of the regional workforce board as a direct provider of WIA Youth services

PLEASE CONTINUE

See ACTION REQUIRED section of the Guidance Letter/Communiqué, Process to Request Permission to Provide Direct Services.

**(THIS AMENDMENT WILL INCLUDE THE SIGN-OFF OF YOUR CHIEF ELECTED OFFICIAL(S) AND APPROVAL BY THE WORKFORCE FLORIDA BOARD)**

SIGNATURE PAGE

RWB Number: 17

RWB Name: Polk County Workforce Development Board, Inc.

Contact Name: Stacy Campbell-Domineck

Contact Phone Number: (863) 508-1600

This amendment to the Local Workforce Service Plan is to be effective for the period July 1, 2013 through June 30, 2014. The signatures indicated below certify agreement to the plan amendment submitted by the Polk County Workforce Development Board, Inc. and the assurance that the region will operate in accordance with this plan amendment and applicable federal and state laws and regulations.

Workforce Board Chairperson

Chief Elected Official

Lori A. Walsh  
Signature

Melony M. Bell  
Signature

Lori Walsh  
Name (printed or typed)

Melony Bell  
Name (printed or typed)



Board Chair  
Title

Polk County Commissioner  
Title

1-24-13  
Date

2-5-13  
Date E.8



**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B                        | C           | D                    | E              | F             | G           | H              | I           |
|----|-------------------|--------------------------|-------------|----------------------|----------------|---------------|-------------|----------------|-------------|
| 1  |                   |                          |             |                      |                |               |             |                |             |
| 2  | Program Name      | Workforce Investment Act |             | Expenditures through | 03/31/13       |               |             |                |             |
| 3  | Report Section    | RWB Formula              |             | Awards through       | 04/22/13       |               |             |                |             |
| 4  | Report SubSection | WIA Adult                |             | Report/date          | FINAL 04/29/13 |               |             |                |             |
| 5  |                   |                          |             |                      |                |               |             |                |             |
| 6  |                   |                          | Data        |                      |                |               |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:              | Orig. Award | Transfers            | Other Adj.     | Revised Award | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 8  | 2012              | RWB 01                   | 1,222,146   | 718,362              | 0              | 1,940,508     | 576,762     | 1,363,746      | 29.72%      |
| 9  |                   | RWB 02                   | 510,128     | 329,173              | 0              | 839,301       | 251,285     | 588,016        | 29.94%      |
| 10 |                   | RWB 03                   | 524,212     | 20,000               | 0              | 544,212       | 180,286     | 363,926        | 33.13%      |
| 11 |                   | RWB 04                   | 616,074     |                      | 0              | 616,074       | 365,310     | 250,764        | 59.30%      |
| 12 |                   | RWB 05                   | 889,475     |                      | 0              | 889,475       | 75,680      | 813,795        | 8.51%       |
| 13 |                   | RWB 06                   | 510,086     |                      | 0              | 510,086       | 142,224     | 367,862        | 27.88%      |
| 14 |                   | RWB 07                   | 441,822     | 80,000               | 0              | 521,822       | 294,872     | 226,950        | 56.51%      |
| 15 |                   | RWB 08                   | 3,416,990   | 2,879,598            | 0              | 6,296,588     | 2,002,572   | 4,294,016      | 31.80%      |
| 16 |                   | RWB 09                   | 782,893     | 335,279              | 0              | 1,118,172     | 831,309     | 286,863        | 74.35%      |
| 17 |                   | RWB 10                   | 1,391,789   | 730,240              | 0              | 2,122,029     | 1,411,854   | 710,175        | 66.53%      |
| 18 |                   | RWB 11                   | 1,545,260   |                      | 0              | 1,545,260     | 661,051     | 884,209        | 42.78%      |
| 19 |                   | RWB 12                   | 5,184,153   |                      | 0              | 5,184,153     | 1,887,040   | 3,297,113      | 36.40%      |
| 20 |                   | RWB 13                   | 1,271,826   | 800,000              | 0              | 2,071,826     | 1,266,960   | 804,866        | 61.15%      |
| 21 |                   | RWB 14                   | 2,396,158   |                      | 0              | 2,396,158     | 1,501,913   | 894,245        | 62.68%      |
| 22 |                   | RWB 15                   | 3,050,311   |                      | 0              | 3,050,311     | 230,976     | 2,819,335      | 7.57%       |
| 23 |                   | RWB 16                   | 1,451,096   | 250,000              | 0              | 1,701,096     | 1,249,653   | 451,443        | 73.46%      |
| 24 |                   | RWB 17                   | 1,581,704   | 1,200,000            | 0              | 2,781,704     | 1,411,468   | 1,370,236      | 50.74%      |
| 25 |                   | RWB 18                   | 1,475,634   | 555,000              | 0              | 2,030,634     | 853,596     | 1,177,038      | 42.04%      |
| 26 |                   | RWB 19                   | 580,400     | 200,000              | 0              | 780,400       | 37,781      | 742,619        | 4.84%       |
| 27 |                   | RWB 20                   | 1,553,271   |                      | 0              | 1,553,271     | 258,195     | 1,295,076      | 16.62%      |
| 28 |                   | RWB 21                   | 3,568,908   | 2,224,540            | 0              | 5,793,448     | 2,818,079   | 2,975,369      | 48.64%      |
| 29 |                   | RWB 22                   | 4,451,455   | 2,000,000            | 0              | 6,451,455     | 4,627,899   | 1,823,556      | 71.73%      |
| 30 |                   | RWB 23                   | 9,566,555   | 2,159,270            | 0              | 11,725,825    | 2,451,157   | 9,274,668      | 20.90%      |
| 31 |                   | RWB 24                   | 2,624,545   |                      | 0              | 2,624,545     | -           | 2,624,545      | 0.00%       |
| 32 | 2012 Total        |                          | 50,606,891  | 14,481,462           | 0              | 65,088,353    | 25,387,922  | 39,700,431     | 39.01%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B                        | C           | D                    | E              | F             | G           | H              | I           |
|----|-------------------|--------------------------|-------------|----------------------|----------------|---------------|-------------|----------------|-------------|
| 1  |                   |                          |             |                      |                |               |             |                |             |
| 2  | Program Name      | Workforce Investment Act |             | Expenditures through | 03/31/13       |               |             |                |             |
| 3  | Report Section    | RWB Formula              |             | Awards through       | 04/22/13       |               |             |                |             |
| 4  | Report SubSection | WIA Adult                |             | Report/date          | FINAL 04/29/13 |               |             |                |             |
| 5  |                   |                          |             |                      |                |               |             |                |             |
| 6  |                   |                          | Data        |                      |                |               |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:              | Orig. Award | Transfers            | Other Adj.     | Revised Award | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 33 | 2011              | RWB 01                   | 1,035,775   | 780,556              | 109,536        | 1,925,867     | 1,925,867   | -              | 100.00%     |
| 34 |                   | RWB 02                   | 434,552     | 239,600              | 45,955         | 720,107       | 720,107     | -              | 100.00%     |
| 35 |                   | RWB 03                   | 442,483     | 0                    | 46,794         | 489,277       | 489,277     | -              | 100.00%     |
| 36 |                   | RWB 04                   | 567,204     | 318,018              | 59,984         | 945,206       | 945,206     | -              | 100.00%     |
| 37 |                   | RWB 05                   | 741,334     | 0                    | 78,398         | 819,732       | 819,732     | -              | 100.00%     |
| 38 |                   | RWB 06                   | 436,501     | (241,331)            | 46,162         | 241,332       | 235,786     | 5,546          | 97.70%      |
| 39 |                   | RWB 07                   | 378,831     | 30,000               | 40,064         | 448,895       | 418,895     | 30,000         | 93.32%      |
| 40 |                   | RWB 08                   | 2,947,930   | 3,195,643            | 311,754        | 6,455,327     | 6,455,327   | -              | 100.00%     |
| 41 |                   | RWB 09                   | 659,146     | 258,991              | 69,707         | 987,844       | 987,844     | -              | 100.00%     |
| 42 |                   | RWB 10                   | 1,218,373   | 744,760              | 128,847        | 2,091,980     | 1,431,168   | 660,812        | 68.41%      |
| 43 |                   | RWB 11                   | 1,329,372   | 1,258,720            | 140,585        | 2,728,677     | 2,728,677   | -              | 100.00%     |
| 44 |                   | RWB 12                   | 4,515,080   | 4,213,600            | 477,485        | 9,206,165     | 9,206,165   | -              | 100.00%     |
| 45 |                   | RWB 13                   | 1,080,317   | 600,000              | 114,247        | 1,794,564     | 1,794,564   | -              | 100.00%     |
| 46 |                   | RWB 14                   | 2,083,095   | 0                    | 220,294        | 2,303,389     | 2,303,389   | -              | 100.00%     |
| 47 |                   | RWB 15                   | 2,639,740   | 1,940,997            | 279,162        | 4,859,899     | 4,859,899   | -              | 100.00%     |
| 48 |                   | RWB 16                   | 1,257,649   | 0                    | 133,001        | 1,390,650     | 1,390,650   | -              | 100.00%     |
| 49 |                   | RWB 17                   | 1,361,763   | 892,529              | 144,012        | 2,398,304     | 2,398,304   | -              | 100.00%     |
| 50 |                   | RWB 18                   | 1,307,226   | 960,000              | 138,243        | 2,405,469     | 2,401,819   | 3,650          | 99.85%      |
| 51 |                   | RWB 19                   | 496,092     | 188,165              | 52,464         | 736,721       | 736,721     | -              | 100.00%     |
| 52 |                   | RWB 20                   | 1,426,697   | 950,000              | 150,878        | 2,527,575     | 2,527,575   | -              | 100.00%     |
| 53 |                   | RWB 21                   | 3,266,964   | 1,914,858            | 345,492        | 5,527,314     | 5,527,314   | -              | 100.00%     |
| 54 |                   | RWB 22                   | 3,817,257   | 1,000,000            | 403,688        | 5,220,945     | 5,220,945   | -              | 100.00%     |
| 55 |                   | RWB 23                   | 7,588,814   | 701,985              | 802,543        | 9,093,342     | 9,093,342   | -              | 100.00%     |
| 56 |                   | RWB 24                   | 2,421,723   | 1,725,000            | 256,105        | 4,402,828     | 3,391,220   | 1,011,608      | 77.02%      |
| 57 | 2011 Total        |                          | 43,453,918  | 21,672,091           | 4,595,400      | 69,721,409    | 68,009,793  | 1,711,616      | 97.55%      |
| 58 | Grand Total       |                          | 94,060,809  | 36,153,553           | 4,595,400      | 134,809,762   | 93,397,715  | 41,412,047     | 69.28%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B                        | C           | D                    | E              | F             | G           | H              | I           |
|----|-------------------|--------------------------|-------------|----------------------|----------------|---------------|-------------|----------------|-------------|
| 1  |                   |                          |             |                      |                |               |             |                |             |
| 2  | Program Name      | Workforce Investment Act |             | Expenditures through | 03/31/13       |               |             |                |             |
| 3  | Report Section    | RWB Formula              |             | Awards through       | 04/22/13       |               |             |                |             |
| 4  | Report SubSection | WIA Dislocated Worker    |             | Report/date          | FINAL 04/29/13 |               |             |                |             |
| 5  |                   |                          |             |                      |                |               |             |                |             |
| 6  |                   |                          | Data        |                      |                |               |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:              | Orig. Award | Transfers            | Other Adj.     | Revised Award | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 8  | 2012              | RWB 01                   | 1,176,455   | (718,362)            | 412,093        | 870,186       | -           | 870,186        | 0.00%       |
| 9  |                   | RWB 02                   | 487,561     | (329,173)            | 170,785        | 329,173       | -           | 329,173        | 0.00%       |
| 10 |                   | RWB 03                   | 231,362     | (20,000)             | 81,041         | 292,403       | 20,293      | 272,110        | 6.94%       |
| 11 |                   | RWB 04                   | 634,251     |                      | 222,167        | 856,418       | 285,606     | 570,812        | 33.35%      |
| 12 |                   | RWB 05                   | 746,505     |                      | 261,489        | 1,007,994     | -           | 1,007,994      | 0.00%       |
| 13 |                   | RWB 06                   | 298,329     |                      | 104,500        | 402,829       | 50,677      | 352,152        | 12.58%      |
| 14 |                   | RWB 07                   | 267,642     | (80,000)             | 93,751         | 281,393       | -           | 281,393        | 0.00%       |
| 15 |                   | RWB 08                   | 4,611,951   | (2,879,598)          | 1,147,245      | 2,879,598     | 445,879     | 2,433,719      | 15.48%      |
| 16 |                   | RWB 09                   | 496,605     | (335,279)            | 173,953        | 335,279       | 40,773      | 294,506        | 12.16%      |
| 17 |                   | RWB 10                   | 1,318,273   | (730,240)            | 461,770        | 1,049,803     | 752,314     | 297,489        | 71.66%      |
| 18 |                   | RWB 11                   | 1,698,993   |                      | 595,129        | 2,294,122     | 7,021       | 2,287,101      | 0.31%       |
| 19 |                   | RWB 12                   | 7,024,295   |                      | 2,460,495      | 9,484,790     | -           | 9,484,790      | 0.00%       |
| 20 |                   | RWB 13                   | 2,407,327   | (800,000)            | 532,577        | 2,139,904     | 736,103     | 1,403,801      | 34.40%      |
| 21 |                   | RWB 14                   | 2,473,449   |                      | 547,206        | 3,020,655     | 1,805,681   | 1,214,974      | 59.78%      |
| 22 |                   | RWB 15                   | 3,566,156   |                      | 1,249,166      | 4,815,322     | 88,834      | 4,726,488      | 1.84%       |
| 23 |                   | RWB 16                   | 1,642,294   | (250,000)            | 363,328        | 1,755,622     | 917,321     | 838,301        | 52.25%      |
| 24 |                   | RWB 17                   | 1,799,622   | (1,200,000)          | 630,379        | 1,230,001     | 169,933     | 1,060,068      | 13.82%      |
| 25 |                   | RWB 18                   | 1,714,382   | (555,000)            | 600,520        | 1,759,902     | 268,930     | 1,490,972      | 15.28%      |
| 26 |                   | RWB 19                   | 406,071     | (200,000)            | 142,240        | 348,311       | 62,256      | 286,055        | 17.87%      |
| 27 |                   | RWB 20                   | 1,861,901   |                      | 652,194        | 2,514,095     | 609,668     | 1,904,427      | 24.25%      |
| 28 |                   | RWB 21                   | 3,643,109   | (2,224,540)          | 1,276,121      | 2,694,690     | 587,207     | 2,107,483      | 21.79%      |
| 29 |                   | RWB 22                   | 5,151,221   | (2,000,000)          | 1,444,199      | 4,595,420     | 2,077,836   | 2,517,584      | 45.22%      |
| 30 |                   | RWB 23                   | 7,633,876   | (2,159,270)          | 2,674,020      | 8,148,626     | -           | 8,148,626      | 0.00%       |
| 31 |                   | RWB 24                   | 2,950,130   |                      | 133,382        | 3,083,512     | -           | 3,083,512      | 0.00%       |
| 32 | 2012 Total        |                          | 54,241,760  | (14,481,462)         | 16,429,750     | 56,190,048    | 8,926,332   | 47,263,716     | 15.89%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                  | B                        | C                  | D                    | E                 | F                  | G                 | H                 | I             |
|----|--------------------|--------------------------|--------------------|----------------------|-------------------|--------------------|-------------------|-------------------|---------------|
| 1  |                    |                          |                    |                      |                   |                    |                   |                   |               |
| 2  | Program Name       | Workforce Investment Act |                    | Expenditures through | 03/31/13          |                    |                   |                   |               |
| 3  | Report Section     | RWB Formula              |                    | Awards through       | 04/22/13          |                    |                   |                   |               |
| 4  | Report SubSection  | WIA Dislocated Worker    |                    | Report/date          | FINAL 04/29/13    |                    |                   |                   |               |
| 5  |                    |                          |                    |                      |                   |                    |                   |                   |               |
| 6  |                    |                          | Data               |                      |                   |                    |                   |                   |               |
| 7  | PROGRAM YEAR       | Awarded to:              | Orig. Award        | Transfers            | Other Adj.        | Revised Award      | LTD Expend.       | Unexpend. Bal.    | Expend Rate   |
| 33 | 2011               | RWB 01                   | 1,052,922          | (780,556)            | 508,190           | 780,556            | 690,939           | 89,617            | 88.52%        |
| 34 |                    | RWB 02                   | 439,948            | (239,600)            | 212,341           | 412,689            | 408,206           | 4,483             | 98.91%        |
| 35 |                    | RWB 03                   | 223,448            | 0                    | 107,848           | 331,296            | 328,918           | 2,378             | 99.28%        |
| 36 |                    | RWB 04                   | 636,037            | (318,018)            | 306,983           | 625,002            | 625,002           | -                 | 100.00%       |
| 37 |                    | RWB 05                   | 606,837            | 0                    | 292,889           | 899,726            | 796,476           | 103,250           | 88.52%        |
| 38 |                    | RWB 06                   | 222,550            | 241,331              | 107,416           | 571,297            | 372,986           | 198,311           | 65.29%        |
| 39 |                    | RWB 07                   | 241,850            | (30,000)             | 116,729           | 328,579            | 307,948           | 20,631            | 93.72%        |
| 40 |                    | RWB 08                   | 4,310,725          | (3,195,643)          | 2,548,808         | 3,663,890          | 3,663,890         | -                 | 100.00%       |
| 41 |                    | RWB 09                   | 458,842            | (258,991)            | 221,459           | 421,310            | 421,310           | -                 | 100.00%       |
| 42 |                    | RWB 10                   | 1,319,455          | (744,760)            | 636,833           | 1,211,528          | 603,660           | 607,868           | 49.83%        |
| 43 |                    | RWB 11                   | 1,697,936          | (1,258,720)          | 819,506           | 1,258,722          | 1,258,722         | -                 | 100.00%       |
| 44 |                    | RWB 12                   | 6,329,028          | (4,213,600)          | 2,817,220         | 4,932,648          | 4,600,414         | 332,234           | 93.26%        |
| 45 |                    | RWB 13                   | 1,555,872          | (600,000)            | 1,061,609         | 2,017,481          | 2,017,481         | -                 | 100.00%       |
| 46 |                    | RWB 14                   | 2,429,538          | 0                    | 1,491,814         | 3,921,352          | 3,921,352         | -                 | 100.00%       |
| 47 |                    | RWB 15                   | 3,438,768          | (1,940,997)          | 1,659,714         | 3,157,485          | 3,157,485         | -                 | 100.00%       |
| 48 |                    | RWB 16                   | 1,633,653          | 0                    | 1,000,420         | 2,634,073          | 2,634,073         | -                 | 100.00%       |
| 49 |                    | RWB 17                   | 1,598,259          | (892,529)            | 771,397           | 1,477,127          | 1,477,127         | -                 | 100.00%       |
| 50 |                    | RWB 18                   | 1,720,206          | (960,000)            | 830,253           | 1,590,459          | 1,515,082         | 75,377            | 95.26%        |
| 51 |                    | RWB 19                   | 376,330            | (188,165)            | 181,634           | 369,799            | 369,799           | -                 | 100.00%       |
| 52 |                    | RWB 20                   | 1,871,154          | (950,000)            | 903,109           | 1,824,263          | 1,824,263         | -                 | 100.00%       |
| 53 |                    | RWB 21                   | 3,428,951          | (1,914,858)          | 1,654,978         | 3,169,071          | 3,169,071         | -                 | 100.00%       |
| 54 |                    | RWB 22                   | 4,672,217          | (1,000,000)          | 2,615,226         | 6,287,443          | 6,287,443         | -                 | 100.00%       |
| 55 |                    | RWB 23                   | 7,187,794          | (701,985)            | 3,469,174         | 9,954,983          | 9,137,565         | 817,418           | 91.79%        |
| 56 |                    | RWB 24                   | 2,864,699          | (1,725,000)          | 882,641           | 2,022,340          | 1,566,909         | 455,431           | 77.48%        |
| 57 | <b>2011 Total</b>  |                          | <b>50,317,019</b>  | <b>(21,672,091)</b>  | <b>25,218,191</b> | <b>53,863,119</b>  | <b>51,156,121</b> | <b>2,706,998</b>  | <b>94.97%</b> |
| 58 | <b>Grand Total</b> |                          | <b>104,558,779</b> | <b>(36,153,533)</b>  | <b>41,647,941</b> | <b>110,053,167</b> | <b>60,082,453</b> | <b>49,970,714</b> | <b>54.59%</b> |

**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B                        | C           | D                    | E              | F           | G              | H           |
|----|-------------------|--------------------------|-------------|----------------------|----------------|-------------|----------------|-------------|
| 1  |                   |                          |             |                      |                |             |                |             |
| 2  | Program Name      | Workforce Investment Act |             | Expenditures through | 03/31/13       |             |                |             |
| 3  | Report Section    | RWB Formula              |             | Awards through       | 04/22/13       |             |                |             |
| 4  | Report SubSection | WIA Youth                |             | Report/date          | FINAL 04/29/13 |             |                |             |
| 5  |                   |                          |             |                      |                |             |                |             |
| 6  |                   |                          | Data        |                      |                |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:              | Orig. Award | Award Adj.           | Revised Award  | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 8  | 2012              | RWB 01                   | 1,631,426   | 0                    | 1,631,426      | 961,013     | 670,413        | 58.91%      |
| 9  |                   | RWB 02                   | 422,575     | 0                    | 422,575        | 89,495      | 333,080        | 21.18%      |
| 10 |                   | RWB 03                   | 400,768     | 0                    | 400,768        | 9,182       | 391,586        | 2.29%       |
| 11 |                   | RWB 04                   | 642,728     | 0                    | 642,728        | 303,024     | 339,704        | 47.15%      |
| 12 |                   | RWB 05                   | 1,168,844   | 0                    | 1,168,844      | 240,845     | 927,999        | 20.61%      |
| 13 |                   | RWB 06                   | 518,021     | 0                    | 518,021        | 283,482     | 234,539        | 54.72%      |
| 14 |                   | RWB 07                   | 506,648     | 0                    | 506,648        | 276,488     | 230,160        | 54.57%      |
| 15 |                   | RWB 08                   | 3,442,775   | 0                    | 3,442,775      | 670,665     | 2,772,110      | 19.48%      |
| 16 |                   | RWB 09                   | 1,072,721   | 0                    | 1,072,721      | 759,972     | 312,749        | 70.85%      |
| 17 |                   | RWB 10                   | 1,279,874   | 0                    | 1,279,874      | 724,287     | 555,587        | 56.59%      |
| 18 |                   | RWB 11                   | 1,920,398   | 0                    | 1,920,398      | 1,546       | 1,918,852      | 0.08%       |
| 19 |                   | RWB 12                   | 5,509,188   | 0                    | 5,509,188      | -           | 5,509,188      | 0.00%       |
| 20 |                   | RWB 13                   | 1,280,163   | 0                    | 1,280,163      | 526,372     | 753,791        | 41.12%      |
| 21 |                   | RWB 14                   | 1,851,260   | 0                    | 1,851,260      | 803,662     | 1,047,598      | 43.41%      |
| 22 |                   | RWB 15                   | 3,833,282   | 0                    | 3,833,282      | 1,217,743   | 2,615,539      | 31.77%      |
| 23 |                   | RWB 16                   | 1,185,650   | 0                    | 1,185,650      | 651,338     | 534,312        | 54.94%      |
| 24 |                   | RWB 17                   | 1,841,927   | 0                    | 1,841,927      | 282,193     | 1,559,734      | 15.32%      |
| 25 |                   | RWB 18                   | 1,215,521   | 0                    | 1,215,521      | 416,304     | 799,217        | 34.25%      |
| 26 |                   | RWB 19                   | 726,186     | 0                    | 726,186        | 340,657     | 385,529        | 46.91%      |
| 27 |                   | RWB 20                   | 1,536,081   | 0                    | 1,536,081      | -           | 1,536,081      | 0.00%       |
| 28 |                   | RWB 21                   | 3,507,818   | 0                    | 3,507,818      | 1,332,763   | 2,175,055      | 37.99%      |
| 29 |                   | RWB 22                   | 3,642,547   | 0                    | 3,642,547      | 920,382     | 2,722,165      | 25.27%      |
| 30 |                   | RWB 23                   | 9,600,070   | 0                    | 9,600,070      | 2,920,496   | 6,679,574      | 30.42%      |
| 31 |                   | RWB 24                   | 2,461,048   | 0                    | 2,461,048      | -           | 2,461,048      | 0.00%       |
| 32 | 2012 Total        |                          | 51,197,519  | 0                    | 51,197,519     | 13,731,909  | 37,465,610     | 26.82%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                  | B                        | C                 | D                    | E                 | F                 | G                 | H             |
|----|--------------------|--------------------------|-------------------|----------------------|-------------------|-------------------|-------------------|---------------|
| 1  |                    |                          |                   |                      |                   |                   |                   |               |
| 2  | Program Name       | Workforce Investment Act |                   | Expenditures through | 03/31/13          |                   |                   |               |
| 3  | Report Section     | RWB Formula              |                   | Awards through       | 04/22/13          |                   |                   |               |
| 4  | Report SubSection  | WIA Youth                |                   | Report/date          | FINAL 04/29/13    |                   |                   |               |
| 5  |                    |                          |                   |                      |                   |                   |                   |               |
| 6  |                    |                          | Data              |                      |                   |                   |                   |               |
| 7  | PROGRAM YEAR       | Awarded to:              | Orig. Award       | Award Adj.           | Revised Award     | LTD Expend.       | Unexpend. Bal.    | Expend Rate   |
| 33 | 2011               | RWB 01                   | 1,502,754         | 0                    | 1,502,754         | 1,502,754         | -                 | 100.00%       |
| 34 |                    | RWB 02                   | 388,421           | 0                    | 388,421           | 388,421           | -                 | 100.00%       |
| 35 |                    | RWB 03                   | 401,572           | 0                    | 401,572           | 401,572           | -                 | 100.00%       |
| 36 |                    | RWB 04                   | 644,221           | 0                    | 644,221           | 644,221           | -                 | 100.00%       |
| 37 |                    | RWB 05                   | 1,063,061         | 0                    | 1,063,061         | 1,038,078         | 24,983            | 97.65%        |
| 38 |                    | RWB 06                   | 481,792           | 0                    | 481,792           | 481,792           | -                 | 100.00%       |
| 39 |                    | RWB 07                   | 470,017           | 0                    | 470,017           | 470,017           | -                 | 100.00%       |
| 40 |                    | RWB 08                   | 3,228,416         | 0                    | 3,228,416         | 3,228,416         | -                 | 100.00%       |
| 41 |                    | RWB 09                   | 983,277           | 0                    | 983,277           | 983,277           | -                 | 100.00%       |
| 42 |                    | RWB 10                   | 1,221,930         | 0                    | 1,221,930         | 1,123,993         | 97,937            | 91.99%        |
| 43 |                    | RWB 11                   | 1,790,484         | 0                    | 1,790,484         | 1,790,484         | -                 | 100.00%       |
| 44 |                    | RWB 12                   | 5,220,693         | 0                    | 5,220,693         | 4,648,212         | 572,481           | 89.03%        |
| 45 |                    | RWB 13                   | 1,178,195         | 0                    | 1,178,195         | 1,178,195         | -                 | 100.00%       |
| 46 |                    | RWB 14                   | 1,751,806         | 0                    | 1,751,806         | 1,751,806         | -                 | 100.00%       |
| 47 |                    | RWB 15                   | 3,590,261         | 0                    | 3,590,261         | 3,590,261         | -                 | 100.00%       |
| 48 |                    | RWB 16                   | 1,117,311         | 0                    | 1,117,311         | 1,117,311         | -                 | 100.00%       |
| 49 |                    | RWB 17                   | 1,718,906         | 0                    | 1,718,906         | 1,718,906         | -                 | 100.00%       |
| 50 |                    | RWB 18                   | 1,167,142         | 0                    | 1,167,142         | 1,161,578         | 5,564             | 99.52%        |
| 51 |                    | RWB 19                   | 674,694           | 0                    | 674,694           | 674,694           | -                 | 100.00%       |
| 52 |                    | RWB 20                   | 1,539,672         | 0                    | 1,539,672         | 1,529,373         | 10,299            | 99.33%        |
| 53 |                    | RWB 21                   | 3,493,124         | 0                    | 3,493,124         | 3,464,969         | 28,155            | 99.19%        |
| 54 |                    | RWB 22                   | 3,404,579         | 0                    | 3,404,579         | 3,404,579         | -                 | 100.00%       |
| 55 |                    | RWB 23                   | 8,318,881         | 0                    | 8,318,881         | 8,318,881         | -                 | 100.00%       |
| 56 |                    | RWB 24                   | 2,502,454         | 0                    | 2,502,454         | 2,273,605         | 228,849           | 90.86%        |
| 57 | <b>2011 Total</b>  |                          | <b>47,853,663</b> | <b>0</b>             | <b>47,853,663</b> | <b>46,885,395</b> | <b>968,268</b>    | <b>97.98%</b> |
| 58 | <b>Grand Total</b> |                          | <b>99,051,182</b> | <b>0</b>             | <b>99,051,182</b> | <b>60,617,304</b> | <b>38,433,878</b> | <b>61.20%</b> |

**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B                  | C           | D                    | E              | F           | G              | H           |
|----|-------------------|--------------------|-------------|----------------------|----------------|-------------|----------------|-------------|
| 1  |                   |                    |             |                      |                |             |                |             |
| 2  | Program Name      | Welfare Transition |             | Expenditures through | 03/31/13       |             |                |             |
| 3  | Report Section    | RWB Formula        |             | Awards through       | 04/22/13       |             |                |             |
| 4  | Report SubSection | Welfare Transition |             | Report/date          | FINAL 04/29/13 |             |                |             |
| 5  |                   |                    |             |                      |                |             |                |             |
| 6  |                   |                    | Data        |                      |                |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:        | Orig. Award | Award Adj.           | Revised Award  | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 8  | 2012              | RWB 01             | 1,657,310   | 0                    | 1,657,310      | 1,106,515   | 550,795        | 66.77%      |
| 9  |                   | RWB 02             | 444,500     | 0                    | 444,500        | 316,164     | 128,336        | 71.13%      |
| 10 |                   | RWB 03             | 304,049     | 0                    | 304,049        | 240,247     | 63,802         | 79.02%      |
| 11 |                   | RWB 04             | 587,072     | 0                    | 587,072        | 351,389     | 235,683        | 59.85%      |
| 12 |                   | RWB 05             | 1,390,346   | 0                    | 1,390,346      | 891,273     | 499,073        | 64.10%      |
| 13 |                   | RWB 06             | 429,916     | 0                    | 429,916        | 325,792     | 104,124        | 75.78%      |
| 14 |                   | RWB 07             | 608,379     | 0                    | 608,379        | 473,458     | 134,921        | 77.82%      |
| 15 |                   | RWB 08             | 5,699,949   | 0                    | 5,699,949      | 3,148,552   | 2,551,397      | 55.24%      |
| 16 |                   | RWB 09             | 722,937     | 0                    | 722,937        | 677,249     | 45,688         | 93.68%      |
| 17 |                   | RWB 10             | 1,714,448   | 0                    | 1,714,448      | 1,042,127   | 672,321        | 60.78%      |
| 18 |                   | RWB 11             | 2,252,311   | 0                    | 2,252,311      | 1,578,684   | 673,627        | 70.09%      |
| 19 |                   | RWB 12             | 7,108,516   | 0                    | 7,108,516      | 6,960,768   | 147,748        | 97.92%      |
| 20 |                   | RWB 13             | 1,371,794   | 0                    | 1,371,794      | 1,371,794   | -              | 100.00%     |
| 21 |                   | RWB 14             | 3,039,169   | 0                    | 3,039,169      | 2,361,617   | 677,552        | 77.71%      |
| 22 |                   | RWB 15             | 6,679,166   | 0                    | 6,679,166      | 3,497,081   | 3,182,085      | 52.36%      |
| 23 |                   | RWB 16             | 2,133,162   | 0                    | 2,133,162      | 1,115,044   | 1,018,118      | 52.27%      |
| 24 |                   | RWB 17             | 2,703,666   | 0                    | 2,703,666      | 1,767,039   | 936,627        | 65.36%      |
| 25 |                   | RWB 18             | 2,074,207   | 0                    | 2,074,207      | 1,511,590   | 562,617        | 72.88%      |
| 26 |                   | RWB 19             | 470,069     | 0                    | 470,069        | 260,267     | 209,802        | 55.37%      |
| 27 |                   | RWB 20             | 2,197,487   | 0                    | 2,197,487      | 1,711,161   | 486,326        | 77.87%      |
| 28 |                   | RWB 21             | 3,123,575   | 0                    | 3,123,575      | 1,746,515   | 1,377,060      | 55.91%      |
| 29 |                   | RWB 22             | 5,238,330   | 0                    | 5,238,330      | 3,625,786   | 1,612,544      | 69.22%      |
| 30 |                   | RWB 23             | 14,483,486  | 0                    | 14,483,486     | 8,673,287   | 5,810,199      | 59.88%      |
| 31 |                   | RWB 24             | 2,721,572   | 0                    | 2,721,572      | 1,774,371   | 947,201        | 65.20%      |
| 32 | 2012 Total        |                    | 69,155,416  | 0                    | 69,155,416     | 46,527,770  | 22,627,646     | 67.28%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                  | B                  | C                  | D                    | E                  | F                  | G                 | H              |
|----|--------------------|--------------------|--------------------|----------------------|--------------------|--------------------|-------------------|----------------|
| 1  |                    |                    |                    |                      |                    |                    |                   |                |
| 2  | Program Name       | Welfare Transition |                    | Expenditures through | 03/31/13           |                    |                   |                |
| 3  | Report Section     | RWB Formula        |                    | Awards through       | 04/22/13           |                    |                   |                |
| 4  | Report SubSection  | Welfare Transition |                    | Report/date          | FINAL 04/29/13     |                    |                   |                |
| 5  |                    |                    |                    |                      |                    |                    |                   |                |
| 6  |                    |                    | Data               |                      |                    |                    |                   |                |
| 7  | PROGRAM YEAR       | Awarded to:        | Orig. Award        | Award Adj.           | Revised Award      | LTD Expend.        | Unexpend. Bal.    | Expend Rate    |
| 33 | 2011               | RWB 01             | 2,071,637          | 75,000               | 2,146,637          | 2,146,637          | -                 | 100.00%        |
| 34 |                    | RWB 02             | 538,833            | 0                    | 538,833            | 538,833            | -                 | 100.00%        |
| 35 |                    | RWB 03             | 370,801            | 29,277               | 400,078            | 400,078            | -                 | 100.00%        |
| 36 |                    | RWB 04             | 694,957            | 41,864               | 736,821            | 736,821            | -                 | 100.00%        |
| 37 |                    | RWB 05             | 1,316,858          | 0                    | 1,316,858          | 1,316,858          | -                 | 100.00%        |
| 38 |                    | RWB 06             | 535,679            | 46,666               | 582,345            | 582,345            | -                 | 100.00%        |
| 39 |                    | RWB 07             | 604,823            | 52,690               | 657,513            | 657,513            | -                 | 100.00%        |
| 40 |                    | RWB 08             | 5,056,499          | 0                    | 5,056,499          | 5,056,499          | -                 | 100.00%        |
| 41 |                    | RWB 09             | 725,837            | 0                    | 725,837            | 725,837            | -                 | 100.00%        |
| 42 |                    | RWB 10             | 1,622,063          | 0                    | 1,622,063          | 1,622,063          | -                 | 100.00%        |
| 43 |                    | RWB 11             | 2,278,353          | 0                    | 2,278,353          | 2,278,353          | -                 | 100.00%        |
| 44 |                    | RWB 12             | 7,623,759          | 0                    | 7,623,759          | 7,623,759          | -                 | 100.00%        |
| 45 |                    | RWB 13             | 1,221,890          | 0                    | 1,221,890          | 1,221,890          | -                 | 100.00%        |
| 46 |                    | RWB 14             | 2,931,740          | 0                    | 2,931,740          | 2,931,740          | -                 | 100.00%        |
| 47 |                    | RWB 15             | 7,774,679          | 0                    | 7,774,679          | 7,774,679          | -                 | 100.00%        |
| 48 |                    | RWB 16             | 2,029,114          | 0                    | 2,029,114          | 2,029,114          | -                 | 100.00%        |
| 49 |                    | RWB 17             | 2,506,668          | 0                    | 2,506,668          | 2,506,668          | -                 | 100.00%        |
| 50 |                    | RWB 18             | 1,832,445          | 0                    | 1,832,445          | 1,832,445          | -                 | 100.00%        |
| 51 |                    | RWB 19             | 453,956            | 39,547               | 493,503            | 493,503            | -                 | 100.00%        |
| 52 |                    | RWB 20             | 2,096,912          | 0                    | 2,096,912          | 2,096,912          | -                 | 100.00%        |
| 53 |                    | RWB 21             | 2,995,439          | 0                    | 2,995,439          | 2,995,439          | -                 | 100.00%        |
| 54 |                    | RWB 22             | 4,838,084          | 0                    | 4,838,084          | 4,838,084          | -                 | 100.00%        |
| 55 |                    | RWB 23             | 14,631,965         | 0                    | 14,631,965         | 14,631,965         | -                 | 100.00%        |
| 56 |                    | RWB 24             | 2,627,629          | 0                    | 2,627,629          | 2,627,629          | -                 | 100.00%        |
| 57 | <b>2011 Total</b>  |                    | <b>69,380,620</b>  | <b>285,044</b>       | <b>69,665,664</b>  | <b>69,665,664</b>  | <b>-</b>          | <b>100.00%</b> |
| 58 | <b>Grand Total</b> |                    | <b>138,536,036</b> | <b>285,044</b>       | <b>138,821,080</b> | <b>116,193,434</b> | <b>22,627,646</b> | <b>83.70%</b>  |



**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B             | C           | D                    | E              | F           | G              | H           |
|----|-------------------|---------------|-------------|----------------------|----------------|-------------|----------------|-------------|
| 1  |                   |               |             |                      |                |             |                |             |
| 2  | Program Name      | Wagner Peyser |             | Expenditures through | 03/31/13       |             |                |             |
| 3  | Report Section    | RWB Formula   |             | Awards through       | 04/22/13       |             |                |             |
| 4  | Report SubSection | Wagner Peyser |             | Report/date          | FINAL 04/29/13 |             |                |             |
| 5  |                   |               |             |                      |                |             |                |             |
| 6  |                   |               | Data        |                      |                |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:   | Orig. Award | Award Adj.           | Revised Award  | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 8  | 2012              | RWB 01        | 713,773     | 0                    | 713,773        | 378,431     | 335,342        | 53.02%      |
| 9  |                   | RWB 02        | 403,002     | (2,048)              | 400,954        | 313,022     | 87,932         | 78.07%      |
| 10 |                   | RWB 03        | 164,452     | 0                    | 164,452        | 71,619      | 92,833         | 43.55%      |
| 11 |                   | RWB 04        | 345,349     | 1                    | 345,350        | 234,415     | 110,935        | 67.88%      |
| 12 |                   | RWB 05        | 590,414     | 0                    | 590,414        | 506,281     | 84,133         | 85.75%      |
| 13 |                   | RWB 06        | 169,835     | 1                    | 169,836        | 67,401      | 102,435        | 39.69%      |
| 14 |                   | RWB 07        | 169,002     | 0                    | 169,002        | 108,190     | 60,812         | 64.02%      |
| 15 |                   | RWB 08        | 2,453,348   | 0                    | 2,453,348      | 1,476,505   | 976,843        | 60.18%      |
| 16 |                   | RWB 09        | 447,826     | 0                    | 447,826        | 334,802     | 113,024        | 74.76%      |
| 17 |                   | RWB 10        | 745,350     | (16,602)             | 728,748        | 589,603     | 139,145        | 80.91%      |
| 18 |                   | RWB 11        | 1,007,430   | 105                  | 1,007,535      | 537,623     | 469,912        | 53.36%      |
| 19 |                   | RWB 12        | 3,946,415   | 0                    | 3,946,415      | 1,009,490   | 2,936,925      | 25.58%      |
| 20 |                   | RWB 13        | 932,613     | 4                    | 932,617        | 490,142     | 442,475        | 52.56%      |
| 21 |                   | RWB 14        | 1,509,382   | (17,888)             | 1,491,494      | 1,112,757   | 378,737        | 74.61%      |
| 22 |                   | RWB 15        | 2,093,998   | 0                    | 2,093,998      | 1,532,622   | 561,376        | 73.19%      |
| 23 |                   | RWB 16        | 924,226     | 0                    | 924,226        | 219,043     | 705,183        | 23.70%      |
| 24 |                   | RWB 17        | 971,273     | 0                    | 971,273        | 489,254     | 482,019        | 50.37%      |
| 25 |                   | RWB 18        | 1,040,112   | 1                    | 1,040,113      | 541,669     | 498,444        | 52.08%      |
| 26 |                   | RWB 19        | 240,536     | 1                    | 240,537        | 162,468     | 78,069         | 67.54%      |
| 27 |                   | RWB 20        | 984,032     | 1                    | 984,033        | 576,792     | 407,241        | 58.62%      |
| 28 |                   | RWB 21        | 2,138,982   | 1                    | 2,138,983      | 1,289,982   | 849,001        | 60.31%      |
| 29 |                   | RWB 22        | 3,249,404   | 0                    | 3,249,404      | 2,056,944   | 1,192,460      | 63.30%      |
| 30 |                   | RWB 23        | 4,575,815   | 0                    | 4,575,815      | 1,745,901   | 2,829,914      | 38.15%      |
| 31 |                   | RWB 24        | 1,820,288   | 0                    | 1,820,288      | 993,119     | 827,169        | 54.56%      |
| 32 | 2012 Total        |               | 31,636,857  | (36,423)             | 31,600,434     | 16,838,075  | 14,762,359     | 53.28%      |

**WFI Financial Report  
WIA Formula Summary**

|    | A                 | B             | C           | D                    | E              | F           | G              | H           |
|----|-------------------|---------------|-------------|----------------------|----------------|-------------|----------------|-------------|
| 1  |                   |               |             |                      |                |             |                |             |
| 2  | Program Name      | Wagner Peyser |             | Expenditures through | 03/31/13       |             |                |             |
| 3  | Report Section    | RWB Formula   |             | Awards through       | 04/22/13       |             |                |             |
| 4  | Report SubSection | Wagner Peyser |             | Report/date          | FINAL 04/29/13 |             |                |             |
| 5  |                   |               |             |                      |                |             |                |             |
| 6  |                   |               | Data        |                      |                |             |                |             |
| 7  | PROGRAM YEAR      | Awarded to:   | Orig. Award | Award Adj.           | Revised Award  | LTD Expend. | Unexpend. Bal. | Expend Rate |
| 33 | 2011              | RWB 01        | 706,374     | (7,808)              | 698,566        | 698,566     | -              | 100.00%     |
| 34 |                   | RWB 02        | 395,482     | 2,048                | 397,530        | 397,530     | -              | 100.00%     |
| 35 |                   | RWB 03        | 163,768     | 0                    | 163,768        | 163,768     | -              | 100.00%     |
| 36 |                   | RWB 04        | 337,232     | 649                  | 337,881        | 337,881     | -              | 100.00%     |
| 37 |                   | RWB 05        | 586,231     | (161)                | 586,070        | 586,070     | -              | 100.00%     |
| 38 |                   | RWB 06        | 165,340     | (1)                  | 165,339        | 165,339     | -              | 100.00%     |
| 39 |                   | RWB 07        | 168,752     | 0                    | 168,752        | 168,752     | -              | 100.00%     |
| 40 |                   | RWB 08        | 2,463,712   | 0                    | 2,463,712      | 2,463,712   | -              | 100.00%     |
| 41 |                   | RWB 09        | 449,834     | 0                    | 449,834        | 449,834     | -              | 100.00%     |
| 42 |                   | RWB 10        | 764,831     | 16,603               | 781,434        | 781,434     | -              | 100.00%     |
| 43 |                   | RWB 11        | 1,013,469   | (1,140)              | 1,012,329      | 1,012,329   | -              | 100.00%     |
| 44 |                   | RWB 12        | 3,963,732   | (372,810)            | 3,590,922      | 3,590,922   | -              | 100.00%     |
| 45 |                   | RWB 13        | 923,870     | (503)                | 923,367        | 923,367     | -              | 100.00%     |
| 46 |                   | RWB 14        | 1,533,292   | 17,280               | 1,550,572      | 1,550,572   | -              | 100.00%     |
| 47 |                   | RWB 15        | 2,085,063   | 0                    | 2,085,063      | 2,085,063   | -              | 100.00%     |
| 48 |                   | RWB 16        | 943,252     | (3,593)              | 939,659        | 939,659     | -              | 100.00%     |
| 49 |                   | RWB 17        | 976,627     | (463,301)            | 513,326        | 513,326     | -              | 100.00%     |
| 50 |                   | RWB 18        | 1,066,631   | (5,402)              | 1,061,229      | 1,061,229   | -              | 100.00%     |
| 51 |                   | RWB 19        | 237,929     | (1)                  | 237,928        | 237,928     | -              | 100.00%     |
| 52 |                   | RWB 20        | 985,502     | (1)                  | 985,501        | 985,501     | -              | 100.00%     |
| 53 |                   | RWB 21        | 2,142,320   | (5,313)              | 2,137,007      | 2,137,007   | -              | 100.00%     |
| 54 |                   | RWB 22        | 3,252,141   | (12,849)             | 3,239,292      | 3,239,292   | -              | 100.00%     |
| 55 |                   | RWB 23        | 4,634,571   | 245                  | 4,634,816      | 4,634,816   | -              | 100.00%     |
| 56 |                   | RWB 24        | 1,826,973   | (227,499)            | 1,599,474      | 1,599,474   | -              | 100.00%     |
| 57 | 2011 Total        |               | 31,786,928  | (1,063,557)          | 30,723,371     | 30,723,371  | -              | 100.00%     |
| 58 | Grand Total       |               | 63,423,785  | (1,099,980)          | 62,323,805     | 47,561,446  | 14,762,359     | 76.31%      |

## Global Talent Competitiveness Council Webinar Meeting Agenda

WEDNESDAY, MAY 15, 2013

10:00 A.M. TO 12 NOON

Call-in Number: 1-888-670-3525, participant pass code 8894334803#.

URL: <http://wfl.adobeconnect.com/gtcc/>

- |   |   |
|---|---|
| <b>I. Chairman's Welcome &amp; Opening Remarks</b>              | <i>Ric Shriver</i>                        |
| <b>II. Self Introductions</b>                                   | <i>Council Members &amp; Staff</i>        |
| <b>III. Review of Today's Agenda</b>                            | <i>Ric Shriver</i>                        |
| <b>IV. Action Item</b>  |   |
| • Statewide Targeted Occupations List                           | <i>Jayne Burgess</i>                      |
| <b>V. Presentation and Discussion Item</b>                      |   |
| • Employer Penetration Report – Council Requested Modifications | <i>Tony Carter, DEO</i>                   |
| <b>VI. Occupational Governance Project Update</b>               | <i>Mason Bishop<br/>ICF International</i> |
| <b>VII. Information Items</b>                                   |   |
| ○ Enhancing Business Engagement                                 |   |
| ○ Business Liaisons Meeting - April 30 & May 1                  | <i>Andra Cornelius</i>                    |
| ○ Business Development Process Services Project                 | <i>Andra Cornelius</i>                    |
| ○ USDOL EBE Grant Update  | <i>Debbie McMullian</i>                   |
| ○ Customer Relationship Management System (CRM)                 | <i>Debbie McMullian</i>                   |
| ○ HCA Healthcare Summit   | <i>Ric Shriver</i>                        |
| ○ Impacts of new CAPE Legislation                               | <i>Jayne Burgess</i>                      |
| ○ Information Technology Targeted Industry Task Force Update    | <i>Andra Cornelius</i>                    |
| <b>IV. Public Comment</b>                                       |   |
| <b>X. Chair's Closing Remarks / Adjourn</b>                     | <i>Ric Shriver</i>                        |



# Global Talent Competitiveness Council Meeting Materials

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3. Action Item:
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4. QRT/IWT Council Matrix (July 1, 2012 – April 30, 2013)
5. Customer Satisfaction Index Project (Shriver/Burgess)
6. Florida *TRADE* Program (McCall)
7. Florida Workforce System Occupational Training Governance Study (Brunell/Burgess)
8. Supply Demand Analysis for Target Industry Clusters and Infrastructure Innovators (Brunell/Shriver/Burgess)
9. Target Industry Cluster Task Forces (Stimac/Cornelius)
10. Technical Assistance for New Career Academies (Middle School IT Academy Technical Assistance Demonstration Project (Grove/McCall)
11. WFI USDOL Expanding Business Engagement Award (Stimac/Wanamaker/McMullian)
12. 2013-2014 High Demand Occupations Lists for Bachelor's & Master's of Higher Degrees (Requested at 2/21/13 Council Meeting)



## **Global Talent Competitiveness Council Meeting Summary**

**FEBRUARY 21, 2013**

**8:30 A.M. TO 11:00 A.M.**

A meeting of the Global Talent Competitiveness Council was held 8:30 a.m. February 21, 2013, at the Turnbull Florida State Conference Center in Tallahassee.

Council members in attendance were: Chairman, Ric Shriver, Al Stimac, Jennifer Grove, Linda Sparks, John Wanamaker, Ed Moore, Mary Lou Brunell, Leslie Ingram, David Armstrong, John Wanamaker, Patty Breedlove, and Eugene Morris representing Robert Woody of the Department of Juvenile Justice. WFI staff attending included: Andra Cornelius, Jayne Burgess, Debbie McMullian, Carmen Mims and Dehryl McCall. The audience also included representatives from regional workforce boards, governmental affairs entities and outside consultants.

Chairman Ric Shiver called the meeting to order and reviewed the agenda. Mr. Shriver noted there would be two Action Items to be presented for consideration followed by presentations.

### **Action Item 1: Career and Professional Education Act – Industry Certifications**

Council Staff, Jayne Burgess, presented information regarding the Career and Professional Education Act (CAPE) giving background of the Act since its inception in 2007. She noted originally the program addressed secondary level students but is now being implemented at the middle school level. She explained this Act requires cross-agency coordination with the Department of Education, the Department of Economic Opportunity and Workforce Florida. Workforce Florida is responsible for publishing a Comprehensive Industry Certification List annually. Ms Burgess stated that this program benefits students by enabling them to earn industry-recognized certificates which will make them more employable and also allows the school districts to obtain additional FTE funding based on certifications earned by students upon their graduation. Statistics reveal that students in career academies are less likely to drop out, have higher GPAs and are higher performing. This is an indication the state is progressing in building a talent supply chain.

Ms. Burgess shared with the group the submission process stating this is the last step in finalizing the 2013-2014 Comprehensive Industry Certification List. This is first being considered by the Council with final consideration/approval to be taken by the full Workforce Florida Board of Directors at their meeting.

Ms. Burgess noted the current 2012-2013 Comprehensive Industry Certification List includes 450 certifications. For 2013-2014, 70 unduplicated were submitted and after full vetting by the

cross-agency team, 26 certifications were being recommended for addition to WFI's current 2012-2013 Comprehensive Industry Certification List. Additionally, the current 2012-2013 Comprehensive List was thoroughly reviewed and revisions/deletions were made resulting from changes by the certifying entities. Certifications that were "dagged" last year due to the fact they no longer aligned with occupations on the Statewide Demand Occupations List or Enterprise Florida's Emerging Industry List were reviewed again and those that did not align with occupations on the 2013-2014 Statewide Demand Occupations List are also being recommended for removal.

It was pointed out certifications that have been on the current Comprehensive Industry Certification List that do not align with occupations on the Statewide Demand Occupations List or Enterprise Florida's Emerging Occupation list will be "dagged" with pending removal after one year. This is to allow the school districts to prepare for the removal of these certifications.

WFI Vice Chair Jennifer Grove suggested industry input be received for those certifications that are slated for removal. It was also mentioned that the special needs of rural counties should be considered, especially relating to certifications for information technology.

Ms. Burgess submitted the Actions Item in 3 parts.

***Motion: Approval of recommended additions to the 2012-2013 Comprehensive Industry Certification List.***

*Motion: Ed Moore*  
*Second: Linda Sparks*

The motion passed unanimously.

***Motion: Approval of modifications to the current 2012-2013 Comprehensive Industry Certification List. The modified 2012-2013 list with newly approved certifications will constitute the 2013-2014 Industry Certification List.***

*Motion: David Armstrong*  
*Second: Mary Lou Brunell*

The motion passed unanimously.

***Motion: Authorize WFI staff, in collaboration with DEO and FLDOE staff, to make any necessary revisions to certifications on the approved Comprehensive Industry Certification List that may evolve from changes by the certifying entities relating to the release of newer versions, upgrades or other changes that may occur relating to eligibility issues of certification requirements***

*Motion: John Wanamaker*  
*Second: Patti Breedlove*

The motion passed unanimously.

### **Action Item #2 - Statewide Target Occupations List**

WFI Council Staff Jayne Burgess presented background on the Statewide Targeted Occupations List Process. Ms. Burgess noted action will first be taken by the Council with final consideration/approval to be taken by the full board. Ms. Burgess reported that under current policy, it is WFI's responsibility to consider and approve the Statewide Targeted Occupations Lists that guide the regions for training for eligible occupations under their Individual Training Accounts (ITA's). Upon consideration and approval of the criteria and adoption of the 2013-2014 Florida Statewide Demand Occupations List, WFI will direct the Labor Market Statistics Bureau to prepare individual targeted lists for each of the workforce board regions. The regional boards will have the opportunity to request additions to their respective targeted lists through the on-line web application. After completion of the on-line submission cycle, WFI staff will present the final requests and research findings from DEO along with recommendations to the Council as well as the full Board in May for final action. Additionally, after completion of this submission cycle, at any time during the program year, regions may present to Workforce Florida requests to add supplemental occupations to their regional lists

After reviewing the proposed criteria and the 2013-2014 Statewide Demand Occupations List, questions from the Council members were raised relating to tracking the details of the occupations especially those pertaining to nursing levels and other health-related occupations such as Physicians Assistants, Primary Care Physicians, Pharmacists and Physical Therapists. Rebecca Rust, Chief of the Bureau of Labor Market Statistics at the Department of Economic Opportunity, explained the occupations are standardized by the Standard Occupational Classification (SOC) system and some are broader and also may require a higher level of training --perhaps at the bachelors or masters' degree level. Ms. Velselka McAlarney, Manager, Occupational Analysis & Employment Projections at the Bureau of Labor Market Statistics pointed out that the occupations being presented today require Post Secondary Adult Vocational or Community College educational levels as this is WFI's current policy. She stated that Statewide Demand Occupation Lists are also prepared for the Workforce Estimating Conference for occupations requiring bachelors and masters degrees. It was requested that the Council be provided with these additional lists. Ms. McAlarney continued by saying new SOC's will be issued in August and several of the new SOC's will reflect the various types of occupations that have been previously lumped under a broader category. It was pointed out the current Statewide Demand Occupations List includes Enterprise Florida's Emerging Targeted Industries and identifies STEM occupations but does not include any occupations in Florida's infrastructure industries. It was suggested that WFI's process be reviewed and new strategies developed to address the needs of the whole talent supply system.

Ms. Burgess presented the staff recommendation for adoption of the following criteria and Statewide Demand Occupations List as approved by the Workforce Estimating Conference at their September 7, 2012 meeting as follows:

- 1) Criteria set forth and approved by the Workforce Estimating Conference (WEC) at their September 2012 meeting:
  - 1 FLDOE Training Codes 3 (PSAV Certificate) and 4 (Community College Credit/Degree)
  - 2 150 annual openings and average growth rate of 1.55% or 360 annual openings with any positive growth
  - 3 Mean Wage of \$13.29/hour and Entry Wage of \$10.80/hour
  - 4 High Skill/High Wage (HSHW) Occupations: Mean Wage of \$20.82/hour and Entry Wage of \$13.29/hour
  
- 2) 2013-2014 Statewide Demand Occupations List prepared by the Labor Market Statistics Bureau at the Department of Economic Opportunity and adopted by the WEC. (Copy attached)

***Motion:*** Approve WFI staff recommendation to:

Adopt the occupational wage criteria established by the Workforce Estimating Conference at their September 7, 2012 meeting adjusted by the Florida Price Level Index for each workforce region and to accept the 2013-2014 Florida Statewide Demand Occupations List as presented by the Workforce Estimating Conference on September 7, 2012.

*Motion: John Wanamaker*  
*Second: Mary Lou Brunell*

The motion passed unanimously.

### **Employer Market Penetration Report**

Tony Carter, Performance Reporting and Analysis Manager, Florida Department of Economic Opportunity, presented to the Council an Employer Market Penetration Rate Report. Mr. Carter stated this report provides statewide as well as regional data based on employer size by matching employers in the Labor Market Statistics EQUI (Enhanced Quarterly Unemployment Insurance) records with Florida employers that have services provided and entered in the EFM (Employ Florida Marketplace) system. He explained the report was designed three years ago as part of the Balanced Scorecard but is now a standalone report. He stated it will be vital in determining how we bring more awareness of the workforce system to the business community by presenting and providing services to employers. He noted data for this report is collected on a quarterly basis.



Mr. Carter pointed out the companies are categorized by employee size: 0-4, 5-9, 10-25, 26-99 and 100+. In any given year, about 40,000 out of 500,000 employers in the state are provide services each quarter. Since the data has been captured for three years, the report provides enough data to study the trends of serving employers in EFM. There appears to be a direct correlation between the number of employers within an area and the penetration rate -- the more employers you have to touch in a certain area, more employers have to be served to get a higher rate. Mr. Carter cautioned the Council not to focus on the percentages and not to try to rank the regions, but to focus on the actual number of employers being served.

It was noted that by introducing this report to the Council and the regions, it could open the door for further discussions and identify better business outreach strategies with our targeted sectors and infrastructure industries.

After much discussion about the report and the possibilities of using this data for benchmarking, the Council members requested the following breakdown of the data as follows:

- How many jobs were posted and placed?
- Can the data reveal:
  - Industry type and number employed (# of jobs)
  - Occupation
    - Can they be identified as entry level, mid entry or advance?
  - Skill level
  - Wage
- Can a “weighting” factor be established?
- How do we serve the smaller companies, which make up a majority of Florida companies, with limited resources?

### **Expanding Business Engagement (EBE)**

Global Talent Innovation Unit staff member, Debbie McMullian, presented information on WFI’s \$70,000 US Dept. of Labor grant award for Expanding Business Engagement. She announced Florida was one of thirteen states that received an award. Ms. McMullian stated the purpose of the grant is to improve program performance through enhanced business-focused services, identify key performance indicators and to develop a business engagement strategic plan. Plans are to evaluate and purchase a CRM system for use by WFI as well as the regions. A team of representatives from industry and workforce and economic development partners has been formed and will be meeting again in March. Ms. McMullian closed by saying this project is timely and aligns with WFI’s plans to assist with expanding business outreach to Florida’s companies to improve the market penetration rate.

## **Corporate Business Engagement Opportunities**

WFI Sr. Vice President Andra Cornelius brought to the attention of the Council the need to better streamline our services to corporate employers to better engage with the business community and how to develop corporate business engagement opportunities. Ms. Cornelius stated in the past, WFI has supported initiatives for corporations that have more than one footprint in the state. One initiative, the Employ Florida Healthcare Initiative, focused on employed worker training for healthcare workers with HCA. She explained this was during the time when ARRA funding was available in addition to WFI's regular allocation. The intent was to create a seamless solution with HCA facilities in the southeast area of the state. Ms. Cornelius cited another instance of Digital Risk and the success of solving their talent needs in Palm Beach but how there was a disconnect in identifying the proper person to share information with when the company wanted to expand in another part of the state.

Ms. Cornelius continued by stating there is a need to figure out how to do this better and develop a seamless solution. In researching who is best in class in this area, it appears that there is no other state that has developed a solution. Therefore, Florida will be in position to develop a solution to the problem. She stated a team of regional directors has been formed to address this multi-faceted issue to formulate great resolutions. The goal will be to develop an internal world-class seamless protocol that can be used system wide when a region has a great experience with a corporation that has locations in other areas of the states.

Ms. Cornelius continued stating another initiative took place that involved Waste Management. The company needed to fill critical occupations in different regions in the state. Working through the Florida Workforce Development Association President at the time, Ed Peachey, a protocol was established. The company has moved forward in implementing this in other states outside of Florida.

Ms. Cornelius stated that WFI would be looking into improving communication and ways of improving corporate business engagement opportunities. She welcomed input from the Council on how to best improve the process. It was discussed that best or "promising" have been identified and how these practices could be shared among the regions. Ms. Cornelius stated having a better understanding through the Expanding Business Engagements Initiative as well as holding twice annually Business Liaisons' meetings to share this information, can help us move forward. It was also mentioned that the use of technology, i.e. a CRM system could assist with this and will be a big part of this process. It was suggested that there might be things to learn from other large organizations that are in business. Other ideas discussed included having a regional workforce staff person be housed with the local economic development office; "hardwiring" a communication process with all the integrated partners, and creating a link on the website to showcase regional "promising" practices categorized by industry served. It was

mentioned that a LinkedIn site had been created for the regional workforce board business liaisons. Additionally, the value of holding industry roundtables was also discussed.

Ms. Cornelius noted WFI is in its last year of our Targeted Industry Cluster Task Forces project and is focusing on the IT sector. She explained these task forces provide an opportunity to hear from industry with participating C-level executives sharing what their current employment needs are as well as their future needs. She stated there is also a great need for asset mapping. There was mention of the need for soft skills training and the importance of employees having these skills as well as technical and clinical skills.

Ms. Cornelius continued by explaining the format of the Task Force Meetings this year would be changed from four intimate discussions with the C-suite executives to having two of the meetings include educational and industry leaders. It was noted that often top executives are not aware of their company's needs and the gaps in the talent. This information is more often know by the Human Resource personnel. It was mentioned that roundtables such as this are a good way to gain intelligence on what the educational system needs to know.

Ms. Cornelius shared with the Council a new economic development tool – Powering Florida.com that has recently been created and launched by Florida Power and Light. She explained this is a compendium for use primarily by economic development practitioners but overlays educational assets and workforce needs. She noted this will be highlighted at the upcoming Business Liaisons'' workshop. Council members expressed interest in bringing this presentation to a future council meeting.

### **Quick Response Funding Increase - Marketing/Outreach Plans**

WFI's Quick Response Training Program Director, Debbie McMullian, stated the Governor's budget is requesting \$12 million for Quick Response Training funding next fiscal year. The program is currently funded at \$6 million. Ms. McMullian stated, if approved, this additional funding will allow Florida to be more competitive with other states by increasing the number of projects and well as increasing the number trained. Additional focus will be on small companies and companies located in small or distressed areas and on consortia-type projects. She also stated that additional ways to be more creative in covering other costs will be researched.

There being no further business to come before the meeting, Chairman Shriver adjourned the meeting.

# Action Item

## STATEWIDE TARGETED OCCUPATIONS LIST ANNUAL APPROVAL PROCESS

\*\*\*\*\*

On an annual basis, Workforce Florida (WFI) is responsible for establishing Regional Targeted Occupations Lists (TOLs). Once developed and approved, these TOLs govern the provision of training programs being offered to individuals needing training assistance within the workforce system in compliance with federal and state law.

This initiative falls under the direction of the Global Talent Competitiveness Council, and is being considered by the Council before moving to the full board for action. Pending action taken by the Council, final consideration/approval will be taken by the Workforce Florida Board of Directors.

### **Background:**

At the Board of Directors meeting in Tallahassee in February, the WFI Board approved the adoption of the following criteria and the Workforce Estimating Conference's 2012-2013 Florida Statewide Demand Occupations List.

- 150 annual openings and average growth rate of 1.55% or 360 annual openings with any positive growth
- Mean Wage of \$13.29/hour and Entry Wage of \$10.80/hour
- High Skill/High Wage (HSHW) Occupations:  
Mean Wage of \$20.82/hour and Entry Wage of \$13.29/hour
- Florida Department of Education (FLDOE) Training Codes of 3 [Postsecondary Adult Vocational (PSAV) Certificate] and 4 [Community College Credit/Degree]. The occupation requires postsecondary adult vocational training or a community college credit certificate, applied technology diploma, associate of applied science degree or associate degree.

Using the approved Statewide Demand Occupations List, the Labor Market Statistics (LMS) Bureau at the Department of Economic Opportunity developed individual regional lists using the Florida Price Level Index. Through an on-line web application, regional boards had an opportunity to review the occupations and submit requests for additions to their individual regional lists. Additionally, regions submitted supplemental occupations requests directly to Workforce Florida for inclusion on their regional TOLs. These supplemental requests included justifications specific to their region to substantiate their

respective requests. Upon closure of the on-line submission period, LMS compiled all requests and presented their analysis to WFI.

WFI has reviewed and analyzed all requests and is recommending the following actions relating to the 2013-2014 Targeted Occupations List:

- 1) WFI staff recommends adoption of all approved requests for additions to the regional targeted occupations lists for 2013-2014 as listed on Attachment A.
- 2) WFI recommends that occupations requiring training below or degrees beyond PSAV and/or the Community College level not be approved as criteria approved by WFI does not allow for training less than or greater than PSAV or Community College levels.
- 3) WFI staff recommends approval of delegation of authority to WFI's President, or his designee, to formally approve/disapprove additions to regional targeted occupations lists during the course of the fiscal year as recommended by staff based on research and analysis by WFI and DEO staff using current labor market information.

### **NEEDED ACTION**

- 1) **Adopt staff recommendation of all approved requests for additions to the regional targeted occupations lists for 2013-2014 as listed on Attachment A.**
- 2) **Adopt staff recommendation to not allow for occupations requiring training below or degrees beyond PSAV and/or the Community College level.**
- 3) **Approve delegation of authority to WFI's President, or his designee, to formally approve/disapprove additions to regional targeted occupations lists during the course of the fiscal year as recommended by staff based on research and analysis by WFI and DEO staff using current labor market information.**

## ATTACHMENT A

| <b>2013-2014 Regional Targeted Occupations Lists<br/>Recommended Regional Requests for Additions</b> |          |  |
|--|----------|--|
|  | SOC Code | Region   |
|  |          | Occupational Title   |
| <b>Region 2 (Okaloosa &amp; Walton)</b>  |          |  |
| 1  | 493011   | Aircraft Mechanics and Service Technicians                 |
| 2  | 333012   | Correctional Officers and Jailers                          |
| 3  | 434051   | Customer Service Representative                            |
| 4  | 434131   | Loan Interviewers and Clerks                               |
| 5  | 435031   | Police, Fire, and Ambulance Dispatchers                    |
| 6  | 419021   | Real Estate Brokers  |
| 7  | 436014   | Secretaries, Except Legal, Medical, and Executive          |
| 8  | 253021   | Self-Enrichment Education Teachers                         |
| 9  | 173031   | Surveying and Mapping Technicians                          |
| 10   | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 6 (Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor)</b>                          |          |  |
| 1  | 493031   | Bus and Truck Mechanics and Diesel Engine Specialists      |
| 2  | 352014   | Cooks, Restaurant  |
| 3  | 333012   | Correctional Officers and Jailers                          |
| 4  | 434051   | Customer Service Representative                            |
| 5  | 472073   | Operating Engineers/Construction Equipment Operators       |
| 6  | 292052   | Pharmacy Technicians                                       |
| 7  | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 10 (Citrus, Levy, Marion)</b>  |          |  |
| 1  | 312021   | Physical Therapist Assistants                              |
| <b>Region 11 (Flagler Volusia)</b>   |          |  |
| 1  | 434051   | Customer Service Representative                            |
| 2  | 518031   | Water and Liquid Waste Treatment Plant Operators           |
| <b>Region 12 (Orange, Osceola, Seminole, Lake, Sumter)</b>   |          |  |
| 1  | 331021   | First-Line Superv. of Fire Fighting and Prevention Workers |
| 2  | 319799   | Healthcare Support Workers, All Other                      |
| 3  | 292052   | Pharmacy Technicians                                       |
| <b>Region 13 (Brevard)</b>   |          |  |
| 1  | 173021   | Aerospace Engineering and Operations Technicians           |
| 2  | 512011   | Aircraft Structure, Surfaces, and Systems Assemblers       |
| 3  | 532022   | Airfield Operations Specialists                            |
| 4  | 532011   | Airline Pilots, Copilots, and Flight Engineers             |
| 5  | 173011   | Architectural and Civil Drafters                           |
| 6  | 493021   | Automotive Body and Related Repairers                      |
| 7  | 493023   | Automotive Service Technicians and Mechanics               |
| 8  | 492091   | Avionics Technicians                                       |
| 9  | 194021   | Biological Technicians                                     |
| 10   | 493031   | Bus and Truck Mechanics and Diesel Engine Specialists      |
| 11   | 535021   | Captains, Mates, and Pilots of Water Vessels               |
| 12   | 351011   | Chefs and Head Cooks                                       |
| 13   | 194031   | Chemical Technicians                                       |

|                                 | SOC Code  | Region  |
|---------------------------------|-----------|---|
|                                 |           | Occupational Title                                      |
| 14                              | 492011    | Computer, ATM, and Office Machine Repairers             |
| 15                              | 151799    | Computer Occupations, All Other                         |
| 16                              | 151131    | Computer Programmers                                    |
| 17                              | 434051    | Customer Service Representative                         |
| 18                              | 173023    | Electrical and Electronic Engineering Technicians       |
| 19                              | 492094    | Electronics Repairers, Commercial and Industrial Equip. |
| 20                              | 512091    | Fiberglass Laminators and Fabricators                   |
| 21                              | 531031    | First-Line Superv. of Material-Moving Vehicle Operators |
| 22                              | 173029.10 | Fuel Cell Technicians                                   |
| 23                              | 319099    | Healthcare Support Workers, All Other                   |
| 24                              | 434161    | Human Resources Assistants, Exc. Payroll                |
| 25                              | 119081    | Lodging Managers  |
| 26                              | 173027    | Mechanical Engineering Technicians                      |
| 27                              | 311012    | Nursing Aides, Orderlies, and Attendants                |
| 28                              | 312011    | Occupational Therapist Assistants                       |
| 29                              | 292081    | Opticians, Dispensing                                   |
| 30                              | 173029.08 | Photonics Technicians                                   |
| 31                              | 472151    | Pipelayers  |
| 32                              | 435031    | Police, Fire, and Ambulance Dispatchers                 |
| 33                              | 252011    | Preschool Teachers, Except Special Education            |
| 34                              | 435061    | Production, Planning, and Expediting Clerks             |
| 35                              | 259041    | Teacher Assistants                                      |
| 36                              | 518031    | Water and Liquid Waste Treatment Plant Operators        |
| <b>Region 14 (Pinellas)</b>     |           |   |
| 1                               | 493011    | Aircraft Mechanics and Service Technicians              |
| 2                               | 173011    | Architectural and Civil Drafters                        |
| 3                               | 493021    | Automotive Body and Related Repairers                   |
| 4                               | 493031    | Bus and Truck Mechanics and Diesel Engine Specialists   |
| 5                               | 311011    | Home Health Aides                                       |
| 6                               | 292012    | Medical and Clinical Laboratory Technicians             |
| 7                               | 292011    | Medical and Clinical Laboratory Technologists           |
| 8                               | 319094    | Medical Transcriptionists                               |
| 9                               | 311012    | Nursing Aides, Orderlies, and Attendants                |
| 10                              | 519083    | Ophthalmic Laboratory Technicians                       |
| 11                              | 292081    | Opticians, Dispensing                                   |
| 12                              | 292052    | Pharmacy Technicians                                    |
| 13                              | 493092    | Recreational Vehicle Service Technicians                |
| 14                              | 173031    | Surveying and Mapping Technicians                       |
| 15                              | 518031    | Water and Liquid Waste Treatment Plant Operators        |
| <b>Region 15 (Hillsborough)</b> |           |   |
| 1                               | 493011    | Aircraft Mechanics and Service Technicians              |
| 2                               | 173011    | Architectural and Civil Drafters                        |
| 3                               | 493021    | Automotive Body and Related Repairers                   |
| 4                               | 311011    | Home Health Aides                                       |
| 5                               | 319094    | Medical Transcriptionists                               |
| 6                               | 311012    | Nursing Aides, Orderlies, and Attendants                |

|  | SOC Code | Region  |
|--|----------|---|
|  |          | Occupational Title  |
| 7  | 519083   | Ophthalmic Laboratory Technicians   |
| 8  | 292081   | Opticians, Dispensing   |
| 9  | 292052   | Pharmacy Technicians  |
| 10   | 493092   | Recreational Vehicle Service Technicians  |
| 11   | 173031   | Surveying and Mapping Technicians   |
| 12   | 518031   | Water and Liquid Waste Treatment Plant Operators  |
| <b>Region 18 (Sarasota and Manatee)</b>                            |          |   |
| 1  | 472111   | Electricians  |
| 2  | 499031   | Home Appliance Repairers  |
| 3  | 514041   | Machinists  |
| 4  | 311012   | Nursing Aides, Orderlies, and Attendants  |
| 5  | 312011   | Occupational Therapist Assistants   |
| <b>Region 19 (Desoto, Hardee, and Highlands)</b>                   |          |   |
| 1  | 493011   | Aircraft Mechanics and Service Technicians  |
| 2  | 519081   | Dental Laboratory Technicians   |
| 3  | 519194   | Etchers and Engravers   |
| 4  | 519071   | Jewelers and Precious Stone and Metal Workers   |
| 5  | 311012   | Nursing Aides, Orderlies, and Attendants  |
| 6  | 519082   | Medical Appliance Technicians   |
| 7  | 519083   | Ophthalmic Laboratory Technicians   |
| 8  | 519000*  | Other Production Occupations - Only for these occupations*: 519012, 519071, 519081, 519082, 519083, 519141, and 519194. |
| 9  | 519141   | Semiconductor Processors  |
| 10   | 519012   | Separating/Clarifying/Precipitating/Still Machine Operators   |
| <b>Region 20 (Indian River, Martin, Okeechobee, and St. Lucie)</b> |          |   |
| 1  | 512011   | Aircraft Structure, Surfaces, and Systems Assemblers  |
| 2  | 395011   | Barbers   |
| 3  | 535021   | Captains, Mates, and Pilots of Water Vessels  |
| 4  | 492094   | Electronics Repairers, Commercial and Industrial Equip.   |
| <b>Region 21 (Palm Beach)</b>                                      |          |   |
| 1  | 312011   | Occupational Therapist Assistants   |
| 2  | 29-2057  | Ophthalmic Medical Technicians  |
| <b>Region 24 (Charlotte, Collier, Glades, Hendry, Lee)</b>         |          |   |
| 1  | 514011   | Computer-Controlled Machine Tool Operators, M & P   |
| 2  | 514041   | Machinists  |
| 3  | 311012   | Nursing Aides, Orderlies, and Attendants  |



|  | SOC Code  | Region<br>Occupational Title  |
|--|-----------|---|
| <b>Regional Requests for Additions Not Recommended - Due to Educational Levels Outside of PSAV/CC<br/>[Current WFI Policy only allows training at PSAV Certificate (3) and Community College Credit/Degree (4) levels]</b> |           |   |
| <b>Region 13 (Brevard)</b>   |           |   |
| 1  | 119041.01 | Biofuels/Biodiesel Technology and Product Development Managers - Requires Bachelor's Degree |
| 2  | 474099.01 | Solar Photovoltaic Installers - Requires less than high school                              |
| 3  | 474099.02 | Solar Thermal Installers and Technicians - Requires less than high school                   |
| 4  | 474099.03 | Weatherization Installers and Technicians - Requires less than high school                  |
| 5  | **        | Request for use of training funds for eligible customers pursuing Bachelors' degrees        |
| <b>Region 19 (Desoto, Hardee, and Highlands Counties)</b>  |           |   |
| 1  | 499098    | Helpers - Installation, Maintenance, and Repair Workers - Requires less than high school    |
| 2  | 519198    | Helpers - Production Workers - Requires less than high school                               |
| 3  | 291111    | Registered Nurses - Request for Bachelor's Degree (RN can be approved for CC level only)    |
| <b>Region 21 (Palm Beach)</b>  |           |   |
| 1  | 291071    | Physician Assistants - Requires Bachelor's Degree   |
| <b>Regional Request for Additions Not Recommended - Pending Submission of Local Data</b>   |           |   |
| <b>Region 6 (Hamilton, Jefferson, Lafayette, Madison, Suwannee, Taylor)</b>  |           |   |
| 1  | 311012    | Nursing Aides, Orderlies, and Attendants  |
| 2  | 399021    | Personal and Home Care Aides  |
| 3  | 252011    | Preschool Teachers, Except Special Education  |

April 12, 2013

Jayne Burgess  
Workforce Florida  
1580 Waldo Palmer Lane, Ste 1  
Tallahassee, Florida 32308

Dear Ms. Burgess:

This letter is to request consideration and approval by Workforce Florida, Inc. (WFI) for expenditure of training funds on occupations listed on the Region 13 Targeted Occupations List (TOL) for eligible customers pursuing Bachelor Degrees.

The recession, the retirement of the shuttle program and associated secondary losses have brought Region 13 many new challenges associated with the local area's population attaining the needed skills to obtain employment. Brevard Workforce is attempting to align educational opportunities to the Governor's \$10,000 Bachelor's Degree Challenge and to open the doors to higher education needed to fulfill the area's shortage of workers in demand occupations. According to the recent BLS Supply Demand report approximately 40% of the occupations in short supply in Brevard requires a Bachelor's Degree. The capability to provide funding for Bachelor's degrees will greatly assist Brevard Workforce in meeting current and future business needs. Brevard Workforce (BW) understands that this request will require a change to the rules.

The following chart provides some additional information to substantiate our request:

| Category                                      | Training Limitation   | Rationale  |
|---|---|--|
| Adult & Dislocated with Some College Credits. | Would apply to persons who already have an A.A. or college credits which could allow achievement of a Bachelors within 2 years. | Many of the remaining adult and dislocated workers who were not served by NEG and other special funding sources will remain in our community and continue needing services. Some of these persons have college credit and assisting with completion of a Bachelor's degree may be the most cost effective method to assist them. |

**Titusville Career Center**  
3880 S. Washington Ave.  
Titusville, FL 32780  
Toll Free 504-7600

**Rockledge Career Center**  
295 Barnes Blvd  
Rockledge, FL 32955  
Toll Free 504-7600

**Palm Bay Career Center**  
5275 Babcock St. NE  
Palm Bay, FL 32905  
Toll Free 504-7600

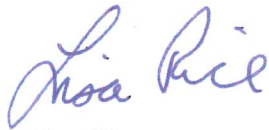
**Executive Offices**  
297 Barnes Blvd.  
Rockledge, FL 32955



| Category  | Training Limitation  | Rationale   |
|---|--|---|
| <p><b>Adult &amp; Dislocated Workers Pursuing a Bachelor Degree</b></p> | <ul style="list-style-type: none"> <li>• Limited to locally approved thresholds for allowable ITA investments.</li> <li>• Limited to persons who can provide verification that they have the balance of funds needed to pay for the degree.</li> </ul> | <p>Staff believes it is a logical step to allow the use of WIA funds to be used for Bachelor degree programs, especially for occupations with a shortage of degreed workers as demonstrated on the BLS Supply Demand Report of April 2013. BW's current "High Wage Tier" for ITA's is currently at \$9,000. As previously stated, Bachelor's degree may be the most cost effective method to assist them.</p> |

Thank you for your support and assistance. Please feel free to contact me if you have questions about this request.

Sincerely,



Lisa Rice  
President

2012-2013 Combined QRT/IWT Matrix thru 4/30/2013

| RWBs                    | WFI<br>Employer Specific Training Programs |                    |              |            |                  |                   |              |            | TOTALS            |                    |               |            |
|-------------------------|--|--------------------|--------------|------------|------------------|-------------------|--------------|------------|-------------------|--------------------|---------------|------------|
|                         | QRT Award                                  | Leveraged Funds    | # Trained    | # Projects | IWT Award        | Leveraged Funds   | # Trained    | # Projects | Total Funds       | Leveraged Funds    | # Trained     | # Projects |
|                         | 7/1/12 - 6/30/13                           |                    |              |            | 7/1/12 - 6/30/13 |                   |              |            | YTD               |                    |               |            |
| 1                       | \$ 368,340                                 | 4,308,611          | 155          | 2          | \$ 89,955        | 199,161           | 156          | 3          | \$ 458,295        | 4,507,772          | 311           | 5          |
| 2                       |  |                    |              |            | \$ 108,904       | 397,403           | 132          | 3          | \$ 108,904        | 397,403            | 132           | 3          |
| 3                       |  |                    |              |            |                  |                   | 0            | 0          |                   | -                  | 0             | 0          |
| 4                       |  |                    |              |            | \$ -             |                   | 0            | 0          | \$ -              | -                  | 0             | 0          |
| 5                       |  |                    |              |            | \$ 157,388       | 521,187           | 199          | 4          | \$ 157,388        | 521,187            | 199           | 4          |
| 6                       |  |                    |              |            | \$ -             |                   | 0            | 0          | \$ -              | -                  | 0             | 0          |
| 7                       |  |                    |              |            | \$ -             | -                 | 0            | 0          | \$ -              | -                  | 0             | 0          |
| 8                       | \$ 242,335                                 | 4,633,268          | 48           | 3          | \$ 251,703       | 584,941           | 298          | 5          | \$ 494,038        | 5,218,209          | 346           | 8          |
| 9                       | \$ 273,672                                 | 25,771,389         | 232          | 2          | \$ 35,223        | 475,368           | 111          | 3          | \$ 308,895        | 26,246,757         | 343           | 5          |
| 10                      | \$ 175,193                                 | 2,256,592          | 155          | 1          | \$ 989           | 7,355             | 23           | 1          | \$ 176,182        | 2,263,947          | 178           | 2          |
| 11                      |  |                    |              |            | \$ 112,276       | 1,564,983         | 217          | 4          | \$ 112,276        | 1,564,983          | 217           | 4          |
| 12                      | \$ 963,596                                 | 3,800,746          | 740          | 5          | \$ 864,804       | 3,387,192         | 1,504        | 24         | \$ 1,828,400      | 7,187,938          | 2,244         | 29         |
| 13                      | \$ 2,000,250                               | 150,010,000        | 2000         | 1          | \$ 232,979       | 2,380,921         | 300          | 9          | \$ 2,233,229      | 152,390,921        | 2,300         | 10         |
| 14                      | \$ 346,133                                 | 10,557,268         | 219          | 2          | \$ 696,771       | 16,133,658        | 955          | 28         | \$ 1,042,904      | 26,690,926         | 1,174         | 30         |
| 15                      | \$ 48,332                                  | 218,109            | 32           | 1          | \$ 1,066,064     | 4,192,745         | 1,758        | 44         | \$ 1,114,396      | 4,410,854          | 1,790         | 45         |
| 16                      |  |                    |              |            | \$ 93,083        | 209,115           | 85           | 5          | \$ 93,083         | 209,115            | 85            | 5          |
| 17                      | \$ 351,309                                 | 4,609,279          | 245          | 5          | \$ 56,441        | 146,201           | 140          | 2          | \$ 407,750        | 4,755,480          | 385           | 7          |
| 18                      | \$ 155,967                                 | 939,106            | 34           | 1          | \$ 92,470        | 174,179           | 179          | 3          | \$ 248,437        | 1,113,285          | 213           | 4          |
| 19                      |  |                    |              |            | \$ -             | -                 | 0            | 0          | \$ -              | -                  | 0             | 0          |
| 20                      |  |                    |              |            | \$ 182,379       | 661,624           | 402          | 7          | \$ 182,379        | 661,624            | 402           | 7          |
| 21                      |  |                    |              |            | \$ 261,684       | 684,673           | 223          | 18         | \$ 261,684        | 684,673            | 223           | 18         |
| 22                      |  |                    |              |            | \$ 476,024       | 10,178,946        | 838          | 27         | \$ 476,024        | 10,178,946         | 838           | 27         |
| 23                      | \$ 187,310                                 | 8,164,138          | 154          | 2          | \$ 432,554       | 1,710,887         | 1,373        | 19         | \$ 619,864        | 9,875,025          | 1,527         | 21         |
| 24                      | \$ 145,425                                 | 2,168,500          | 80           | 1          | \$ 252,711       | 706,828           | 250          | 9          | \$ 398,136        | 2,875,328          | 330           | 10         |
| STW                     | \$ 79,842                                  | 1,158,560          | 53           | 1          |                  |                   |              |            | \$ 79,842         | 1,158,560          | 53            | 1          |
| <b>Total</b>            | <b>5,337,704</b>                           | <b>218,595,566</b> | <b>4,147</b> | <b>27</b>  | <b>5,464,402</b> | <b>44,317,367</b> | <b>9,143</b> | <b>218</b> | <b>10,802,106</b> | <b>262,912,933</b> | <b>13,290</b> | <b>245</b> |
| <b>Cost per Trainee</b> | <b>\$1,287</b>                             |                    |              |            | <b>\$598</b>     |                   |              |            | <b>\$813</b>      |                    |               |            |

updated 5/3/13 mhc

**Customer Satisfaction Index for Target Industry Clusters *and* Infrastructure Industries  
Market Research and Management Services Project B**

**WFI Board Member Liaison: Ric Shriver**

**WFI Staff Lead: Jayne Burgess**

This project (related to Projects A & J) is focused on ensuring that Florida demonstrates global, benchmark talent leadership in its three-year staged focus on the six industry clusters (two industry clusters per year) and infrastructure industries that underpin the success of all industry clusters—namely energy, water resources, telecommunications infrastructure (broadband), and transportation. Through this project, WFI hopes to provide collaborative partners, policy leaders, and industry decision-makers with clear evidence of world-class service and to aspire toward global competitors' use of Florida's standards of customer service, industry assessment and benchmarking—in other words, that our system is indeed demand-driven. Being demand-driven requires strength in business intelligence, communications and occupational and skills data. It customarily requires performance and customer satisfaction indexing to align programs with employer needs. The approach is used because alignment of programs and talent to business needs improves Florida's talent pipeline and Floridians' opportunities to find employment, build careers, establish wealth and prepare for changing markets. In effect, this project will enable the WFI Board to “prove” that through strategic focus and direction on making staged improvements in talent development that Florida is moving the needle and these improvements are acknowledged through external customer satisfaction and validation. This project is reliant on work produced under Project A and the task forces envisioned under Project J. Once task forces are operational (i.e., properly resourced, comprised of business leaders who understand the complexities of the clusters and where their ventures reside) the task forces can be missioned to support and inform the customer satisfaction, media and marketing, and research requirements in the WFI Strategic Plan and challenged to improve the forward-looking, market intelligence requirements of the Workforce Florida Board of Directors.

**Status:**

The contractor, SRA Research Group, successfully completed Years One and Two of the project. Year One covered the Aviation/Aerospace, Clean Tech and Healthcare sectors. At the Global Talent Competitiveness Council meeting in August last year in Pensacola, the Customer Satisfaction Index Report for the Healthcare sector was discussed at length. It was noted the CSI on Healthcare report is for the record, but it was recommended that a task force or commission be appointed to look at the status of the healthcare industry/workforce today in Florida in preparation for tomorrow.

For Year Two, a contract renewal in the amount of \$667,000 was awarded to SRA Research Group to build expandable, credible assessments for the Year Two target industry clusters (Homeland Security & Defense, Life Sciences as well as infrastructure industries Energy and Water Resources), form and manage an annual assessment institute that involves all

collaborative partners so that workforce services are noted and marketed, processes are improved and problems resolved.

Activities performed under the Year Two contract included participation in a January 12<sup>th</sup> alignment meeting with other WFI contractors; submission of an implementation plan and a communications strategy.

The contractors also prepared a technical memorandum documenting the overall methodology proposed for developing the customer satisfaction index, including specific work steps and data sources. Secondly, the contractors executed a nationwide review of best practices (and where applicable, international) of workforce development programs, policies and partnerships to support the specific industry clusters being examined in Year Two. Additionally, the contractors identified and formed industry technical resource groups for each of the two targeted industry clusters and infrastructure industries for a total of four such groups.

A total of twelve Technical Resource Group (TRG) teleconferences were held – three for each of the clusters - Life Sciences, Homeland Security and Defense, Energy and Water. Survey questions were reviewed by the TRGs and suggested changes have been incorporated into the final questionnaires.

Qualitative research from in-depth interviews was completed industry clusters. Quantitative Research was also completed and raw data with cross-tabulations was delivered.

Final reports for each of the sectors were submitted along with the recaps of the last four Technical Resource Groups meetings along with the quarterly status report.

SRA Research Group presented the current perceptions of the cluster overall indicating how satisfied employers are in Florida versus other states at the following meetings:

November 7<sup>th</sup> at the Florida Energy Workforce Consortium Meeting at the Orlando Utilities Commission - *“Energy Employer Satisfaction with Attracting and Retaining Workforce Talent”*

November 27<sup>th</sup> at the Florida Section of the American Water Works Association - *Water Employer Satisfaction with Attracting and Retaining Workforce Talent*

**Contract Period: 1/6/12 – 12/31/12**

**Contract Amount: \$697,000**

**Contract Balance: \$40,000 recaptured**

### **Year Three –**

This year's assessments will cover Information Technology and Transportation, Broadband and Logistics/Distribution as the infrastructure industries.

The Year Three contract is underway with approved activities that were outlined in the Plan of Engagement. The Technical Resource Group members have been identified and two IT Technical Resource Group meetings have been held. In-depth interviews are also being performed.

**Contract Period: 1/8/13 – 12/31/13**

**Contract Amount: \$495,000**

**Contract Balance: \$403,000**



**United States Department of Labor (USDOL) Trade Adjustment Assistance Community College and Career Training (TAACCT) Grant**

**WFI Board Member Liaisons: Al Stimac, Dr. Bill Law, Eric Kennedy**

**WFI Staff Lead: Dehryl McCall**

Overview: On behalf of the Florida College Consortium, St. Petersburg College (SPC) applied for and received \$15 million United States Department of Labor (USDOL) Trade Adjustment Assistance Community College and Career Training (TAACCT) Grant. SPC titled it Florida TRADE (which stands for Transforming Resources for Accelerated Degrees and Employment), because that's exactly the vision – to transform Florida's existing training and education system in advanced manufacturing. The Florida team began by collaborating to identify and align existing resources like curricula and equipment from 12 very different institutions – to help build capacity and serve as a sustainable way to offer training for a range of skill levels in advanced manufacturing by providing wide-spread access for students to take courses online and combine their training with practical work experience through internships and hands-on training activities.

**Progress since last quarter:**

- The first Steering Committee meeting was held on February 28th at 9:00 a.m. on the St Petersburg College Clearwater campus and can be viewed at the following link - <http://www.youtube.com/watch?v=uekuVEtSWCg&feature=youtu.be>. Al Stimac, President of the Manufacturer's Association of Florida (MAF), Workforce Florida Board Member and owner of Metal Essence Inc. as well as Michael Kon, Manager – Quality Engineering with Lockheed Martin, have agreed to Co-Chair the Steering committee.
- SPC has developed a website for this grant <http://www.fltrade.org/> as well as Florida TRADE SharePoint site for all 12 colleges and key partners to share key information.
- The Steering Committee decided to incorporate a fourth sub-committee. It will be called the Workforce committee and will focus on the recruitment of business partners, internships, and job placement.
- Workforce Florida Inc. has held three calls with the 12 participating Regional Workforce Boards, SPC staff and partners on January 24, March 15, and April 16th. Topics have included: background summary; Manufacturers Association of Florida; RWB /College Contact List; RWB Community Stakeholder Agreements & dedicated Recruiter Staff; Technical proposal; Processes and collaboration i.e. who's taking the lead; EFM & Data Collection; Performance Goals; and Next Steps. Next RWB meeting is TBA.
- Contracts are being finalized and the Banner Center Curriculum will be available for use through an online ordering process using Amazon.
- The Department of Economic Opportunity is developing the data entry process and participant reporting instructions for the RWBs to record the required information.
- SPC is hosting a three day workshop/forum for Florida TRADE Grant College Program Managers on the SPC Clearwater Campus 4/30-5/2.
- Next RWB call is TBA



**Florida Workforce System Occupational Training Governance Study (formerly  
Occupational Training Program Governance Study)**

**Project H**

**WFI Board Member Liaison: Mary Lou Brunell**

**WFI Staff: Jayne Burgess**

**Update**

A contract in the amount of \$350,000 was awarded to ICF International to provide professional advisory and technical assistance services to (1) review and analyze Florida's talent development assets aligned to economic development priorities and employer occupational demands; (2) conduct a thorough analysis of Florida's Targeted Occupational List (TOL) to include a review and analysis of the statutory responsibilities of Florida Workforce Estimating Conference and its activities in order to support Workforce Florida's strategic priority to ensure Florida's workforce system is delivering the skilled talent businesses need; and (3) analyze Florida's current workforce investment system and make recommendations on efficient and effective practices, policies and legislative changes that could be implemented to improve results for Florida's employers and workers. The project will provide a new vision for talent development enabling Florida to lead the nation in building a world-class comprehensive talent development system utilizing all education, economic and workforce assets to align education and career pathways in support of job growth and worker choices to build a competitive workforce.

The project is well underway in line with the Plan of Engagement. Meetings have been held with WFI staff and the principals of the contract to discuss the planned activities.

The Contractor presented a webinar on the progress of the project to date on April 26<sup>th</sup> that covered the findings pertaining to the Resource Matrix of Employment and Job Training Resources, Infrastructure Asset Mapping and a Florida Jobs Benchmarking Analyses and Interim Occupational Demand Report.

**Contract Period: 1/8/13 – 12/31/13**

**Contract Amount: \$350,000**

**Contract Balance: \$255,000**

## **Supply & Demand Analysis for Target Industry Clusters and Infrastructure Innovators Project A**

**WFI Board Member Liaisons: Mary Lou Brunell and Ric Shriver**

**WFI Staff Lead: Jayne Burgess**

To remain competitive in a dynamic economy, Florida relies on a workforce system that is not only responsive to the changing needs of employers and workers, but also anticipatory of the future skills and demands needed to compete in a global economy. It must be capable of bridging the gap between stagnating and emerging industries, addressing both workforce preparedness and workforce readiness, and based on a strong understanding of future workforce needs gained through data analysis and qualitative business partnership insights. In addition to globalization, the retirement of the Baby Boom generation and the move of business toward more innovative, knowledge-based markets have combined to make the skills of the workforce paramount to successful economic development. Analyzing occupations and critical skill sets within Florida's targeted industry clusters can help identify which occupations provide the best opportunities for investment to building different types of skills, identify gaps and build career ladders—entry-level through advanced—in high growth areas. This supply/demand modeling focused on occupational skills can help guide both new entrants to the workforce as well as incumbent workers, Florida's workforce system and educational providers by comparing workforce needs to the numbers and types of training, certificates and degrees awarded. WFI and DEO team members have agreed to a six-tier methodology. Additionally, that methodology has been shared with and accepted by Enterprise Florida. The first industry clusters addressed in Year One--2010-2011 were aviation/aerospace and clean energy.

In Year Two, the second two industry clusters were addressed—Homeland Security & Defense and Life Sciences with a contract renewal in the amount of \$600,000 (\$300,000 for each cluster) awarded to University of West Florida, Haas Center.

The contractor developed comprehensive supply/demand analyses for both clusters following the outlined six tier process. Quarterly status reports were submitted for February, April and July.

Other activities included:

- Five focus groups were completed - two for the Homeland Security and Defense and three for the Life Sciences. The sixth was held at Bio Florida to include Life Sciences manufacturers. Regional Workforce Board Executive Directors and Business Liaisons were invited to participant in these important focus group meetings.
- Two remaining focus groups took place following the next two Targeted Industry Cluster Task Force meetings in Orlando.

- Fifteen in-depth interviews were completed with experts around the state of Florida. More interviews are scheduled in the coming few weeks in response to feedback from focus group participants.
- Cluster Business Surveys - The Haas Center subcontracted with SRA Research Group (currently under contract for WFI's Customer Satisfaction Project) to include in their survey document two critical questions: the top five occupations in which there is a current shortage of available talent and the top five occupations in which the companies believe there will be a shortage five years hence. Final survey data from SRA has been received and data is being incorporated into the appropriate statewide and regional analyses.
- Regional Focus Group Post-Analysis Reports were completed.
- Life Sciences Focus Group held a meeting at Florida International University President's – Mark Rosenberg – Mansion in Miami on October 26<sup>th</sup>.

The Year Two contract has ended.

**Contract Period: 1/9/12 – 12/31/12**

**Contract Amount: \$600,000**

**Contract Balance: \$ 20,000**

### **Year Three**

The contract has been executed and work is underway. The results of this project will provide WFI with a deep understanding of the workforce needs of the Information Technology sector. The project is also focusing on statewide and regional levels with a model Northwest Florida Regional Skilled Technician Supply/Demand Analysis. Meetings have been held and the Comprehensive Review and Assessment of Recent Analyses have been performed. Also a micro portal has been developed.

**Contract Period: 1/30/13 – 12/31/13**

**Contract Amount: \$380,000**

**Contract Balance: \$332,500**

**Target Industry Cluster Task Force**  
**Project J – WFI Strategic Plan**  
**WFI Staff Lead: Andra Cornelius**



**Bottom Line**

- WFI is in the final year of its three-year strategic plan of work in commissioning Target Industry Cluster Task Forces. This year, the final sector of focus is on the **Information Technology** sector. In Year One, WFI focused on **Aviation/Aerospace** and **Clean Technology**. Last year (Year Two) WFI focused on **Life Sciences** and **Homeland Security and Defense**.
- The Task Force is comprised of statewide business leaders (senior “C” level) that are focusing on the competitiveness of Florida’s talent and talent development system.
- Tapping into business intelligence and proving that customer satisfaction is “world-class” requires sound relationship management with leaders in industry clusters. The use of cluster task forces allows WFI to use leaders in fields they know best, open formal and informal channels with industry decision-makers and test assumptions with employers. Enabling this type of candid discussion requires that the meetings be closed without attendance from interested onlookers.
- It is expected that the Task Force will develop communiqués or dispatches about issues of top concern to the Information Technology Sector including the state’s talent pipeline, skills gaps, and workforce/education concerns. These dispatches may be used to brief Governor Scott, key members of his staff, and other collaborative partners including Enterprise Florida.
- Among other things, the Task Forces’ initial scope of work will be to review and improve two strategic projects: A customer satisfaction index that gauges business satisfaction with the Florida market and a rigorous supply/demand analysis that speaks to short- and long-term talent supply for the industry cluster.
- The Task Force members have issued the following key data requests following the first meeting:
  - How do economic developers pitch Florida’s IT industry and its IT talent pipeline?
  - How do economic developers pitch Florida’s educational system as a quality of life value?
  - What is EFI’s official definition of the IT industry / industry cluster?
  - What are the historical costs of IT programs in Florida?
  - Is the Career Academy / Experiential Learning Model proven?
  - What are Florida’s state agencies / leaders doing to prepare for the “silver tsunami” in key industry sectors? How is the IT sector impacted?
  - What is the status on H1B usage in Florida with respect to IT talent?
- A special project portal—[www.FloridaITTalent.org](http://www.FloridaITTalent.org)—has been created to warehouse meeting documentation, milestones, relevant dispatches and reports, peripheral analysis and items, and editorial positioning.
- Four in-person meetings are scheduled for the 2013 year of work (see dates below). The first and third meetings are Task Force members only (demand team). Alternate meetings (second

and fourth) will be expanded to engage state and regional “supply side” partners, including the state university system, Florida Department of Education, regional workforce board leaders, delegates from targeted “test bed” regions, and state CIO directors to exchange views with the Task Force leaders on how best to development talent pipeline strategies and solutions for this key sector of the Florida economy.

- An enhanced communications strategy with periodic milestones conveyed to board / state leadership has been incorporated this year, with resultant items for workforce policy discussion or system wide process implementation.
- Contractor lead: Don Upton and Teresa Barber, Fairfield Index.

#### **KEY DATES**

**February 6 (Task Force only)**

**May 7 (Open Session with Supply Side partners)**

**August 14 (Task Force only)**

**October 29 (Open Session)**

**Task Force Meeting #1 (Tallahassee)**

**Task Force Meeting #2 (Orlando)**

**Task Force Meeting #3 (Orlando)**

**Task Force Meeting #4 (Orlando)**

**Technical Assistance for New Career Academies (The Middle School IT Academy  
Technical Assistance demonstration project) – The Whetstone Group**

**Project J**

**WFI Board Member Liaison: Jennifer Grove**

**WFI Staff Lead: Dehryl McCall**

**Overview:** The goal of Phase I the project was to establish fifteen (15) Middle School CAPE IT Career Academies and/or Career Themed Courses, which were implemented in the fall of the 2012-2013 school year and have yielded over 800 industry recognized certifications to date.

**Outcomes of Phase I:**

- **15 new Middle School IT Career academies up and running in the 2012 – 2013 year**
- **16 teachers earned 23 Microsoft and Adobe industry certifications**
- **Approximately 1408 students (mostly 8<sup>th</sup> graders) participated in the academies**
- **Over 800 credentials have been earned since September 2012**

**Progress since last quarter:**

Workforce Florida Inc has entered into Phase II, where through a competitive process, the following additional 10 middle schools have been selected and will be provided professional technical services as well as industry products to develop new IT career academies: Howard Bishop Middle School, Alachua County; Jenkins Middle School, Putnam County; Suwannee Middle School; Suwannee County; Woodlawn Beach Middle School, Santa Rosa County; Breakfast Point Academy, Bay County; Lake City Middle School, Columbia County; Gulfstream Middle School, Broward County; Northport K-8 School, Saint Lucie; Arvida Middle School, Miami Dade County; and Seaside Neighborhood School, Walton County.

See the website <http://www.middleschoolcareeracademytap.com/> developed by CHOICE IT Career Academy Students in Niceville, FL.

**Next Steps:**

Each of the 10 participating schools attended a three-day workshop which covered sessions on contextualization of the project, the CAPE Legislation, the Whetstone's "LEAD model" and the anticipated outcomes of the project etc. FloridaWorks – the Regional Workforce Board for Alachua and Bradford Counties, and Santa Fe College sponsored and hosted the event.

**Contract Amount: \$580,000**

**Contract Balance: \$ 262,200**

**USDOL – Technical Assistance Initiative**  
**Expanding Business Engagement Grant**  
**WFI Board Member Liaison: All Stimac and John Wanamaker**  
**WFI Staff Lead: Debbie McMullian**

**Overview:**

This is a grant provided by the United States Department of Labor's Employment and Training Administration and is being facilitated by Social Policy Research (SPR) associates. It is focused on improving program performance through enhanced business-focused services calling for better business communications, intelligence, performance and accountability for the workforce system. The grant will insure that our services are helping businesses achieve job creation, job retention and job advancement. We will assess our infrastructure and acquire system capabilities to help us track, measure and report on these performance measures, similar to our Daily Jobs Report. The platform chosen will include Customer Relationship Management (CRM) that assist in managing interactions with businesses and the technology to organize and report in real-time the performance of our business relations.

Twelve other states are also in the initiative: Massachusetts, New Jersey, Maryland, Mississippi, North Carolina, South Carolina, Colorado, Montana, Oklahoma, Indiana, Minnesota, and Ohio.

**Updates:**

The Florida team participated in the Expanding Business Engagement Pre-Institute Web meeting on October 3, 2012 which outlined the initiative's framework of four basic principles:

1. Understand your goals and develop a shared business and purpose;
2. Engage business as collaborators;
3. Deliver solutions and enact strategies that add value to businesses and communities; and
4. Measure results and document value.

This webinar was interactive, allowing the attendees to share some of their strengths and challenges when trying to engage local businesses.

The November 8<sup>th</sup> state teleconference unfortunately coincided with our Board of Directors meeting therefore not all team members will be able to participate. At this meeting state teams were to be given additional direction and materials to prepare for the upcoming Fall Institute which was tentatively scheduled for December 5-7<sup>th</sup>.

Our first face to face state team meeting was held November 15, 2012 in Region 11. Executive Director Rick Fraser, President, hosted the meeting at his office.

At the November 15<sup>th</sup> meeting, the EBE team discussed objectives of the grant, agreeing we must have real-time, measurable performance data. At this time, the Regional Workforce Boards use a variety of systems to gather data, however none are “real-time” and there is not always consistency. A survey to the Regional Workforce Board was sent out in January to determine how business penetration data is gathered and measured among the regions.

The Team will also begin evaluating various CRM platforms to determine which will better serve the needs of Florida. Salesforce.com, Microsoft Dynamics CRM, GeoSol, Oracle CRM, SAP, Sage SalesLogix, and Sugar CRM will be evaluated.

**On March 7, 2013** the Florida EBE team met in Gainesville to continue evaluation of CRM systems. Presentations were made by Robert de Cardenas with Salesforce.com and Gerry Genovese presented the Sage SalesLogix system. After the presentations, the team further discussed each CRM platforms from the evaluation tool that was completed by members of the team. The team also reviewed the results of the regional survey that was conducted to determine what the regions are using to measure business penetration. The team agreed that Salesforce.com seems to be the best system moving forward. Next steps will be to determine cost of licenses and building the platform. The Business Development Process Services project was introduced to the team as a WFI companion project to the EBE. This project will provide the regional account manager training component and business development process to further strengthen business engagement. Negotiations for the Business Development Process Services contract are underway and activities will coincide with the EBE Salesforce.com project.

**Contract Period: 6/3/12 – 6/3/14**

**Contract Amount: \$70,000**



# 2013-14 High Demand Occupations Requiring a Bachelor's Degree

## Wage Criteria Indexed by 2012 Q2 Employment Cost Index

### Sorted by Occupational Title

Workforce Estimating Conference Selection Criteria:

- 1 FLDOE Training Code 5 (Bachelor's Degree)
- 2 50 annual openings and average growth rate of 1.55% or 150 annual openings with any positive growth
- 3 Mean Wage of \$24.44/hour (\$50,835/year) and Entry Wage of \$17.11/hour (\$35,589/year)  
Note: The mean wage of \$24.04 and the entry wage of \$16.83, adopted as criteria in 2011, were indexed to Second Quarter 2012 with the Employment Cost Index.

| SOC Code† | Occupational Title†   | Annual         | Annual   | 2012 Hourly Wage |       | FLDOE         | In EFI             | STEM        |
|-----------|---|----------------|----------|------------------|-------|---------------|--------------------|-------------|
|           |   | Percent Growth | Openings | Mean             | Entry | Training Code | Targeted Industry? | Occupation? |
| 132011    | Accountants and Auditors                                    | 1.87           | 3,237    | 32.09            | 19.43 | 5             | Yes                | Yes         |
| 112011    | Advertising and Promotions Managers                         | 1.64           | 59       | 44.70            | 24.50 | 5             | Yes                | No          |
| 172031    | Biomedical Engineers  | 5.93           | 51       | 38.15            | 24.94 | 5             | Yes                | Yes         |
| 132031    | Budget Analysts   | 1.75           | 104      | 30.88            | 21.42 | 5             | No                 | No          |
| 251011    | Business Teachers, Postsecondary                            | 2.48           | 248      | 56.48            | 29.17 | 5             | No                 | No          |
| 111011    | <b>Chief Executives**</b>                                   | 0.79           | 660      | 92.19            | 48.26 | 5             | Yes                | No          |
| 172051    | Civil Engineers   | 2.00           | 581      | 39.95            | 25.73 | 5             | Yes                | Yes         |
| 113021    | <b>Computer and Information Systems Managers**</b>          | 1.61           | 250      | 60.86            | 41.48 | 5             | Yes                | Yes         |
| 251021    | Computer Science Teachers, Postsecondary                    | 2.31           | 84       | 54.41            | 29.90 | 5             | No                 | Yes         |
| 291031    | Dietitians and Nutritionists                                | 1.42           | 199      | 27.74            | 17.98 | 5             | Yes                | Yes         |
| 119032    | <b>Education Administrators, Elementary and Secondary**</b> | 1.26           | 200      | 43.07            | 31.80 | 5             | No                 | No          |
| 119033    | <b>Education Administrators, Postsecondary**</b>            | 2.39           | 83       | 52.32            | 35.62 | 5             | No                 | No          |
| 172071    | Electrical Engineers  | 1.00           | 249      | 40.05            | 26.99 | 5             | Yes                | Yes         |
| 252021    | Elementary School Teachers, Except Special Education        | 1.94           | 2,889    | 30.94            | 22.64 | 5             | No                 | No          |
| 119041    | <b>Engineering Managers**</b>                               | 1.37           | 213      | 57.06            | 38.88 | 5             | Yes                | Yes         |
| 172081    | Environmental Engineers                                     | 2.03           | 134      | 34.05            | 19.33 | 5             | Yes                | Yes         |
| 192041    | Environmental Scientists & Specialists, Including Health    | 1.15           | 264      | 27.24            | 17.49 | 5             | Yes                | Yes         |
| 132051    | Financial Analysts  | 1.86           | 326      | 34.44            | 22.71 | 5             | Yes                | Yes         |
| 113031    | <b>Financial Managers**</b>                                 | 1.13           | 530      | 59.12            | 33.97 | 5             | Yes                | Yes         |
| 113121    | Human Resources Managers                                    | 1.69           | 119      | 49.85            | 31.30 | 5             | Yes                | No          |
| 172112    | Industrial Engineers  | 0.79           | 289      | 33.26            | 20.33 | 5             | Yes                | Yes         |
| 252012    | Kindergarten Teachers, Except Special Education             | 1.98           | 506      | 30.62            | 22.26 | 5             | No                 | No          |
| 131081    | Logisticians  | 3.34           | 206      | 32.71            | 21.46 | 5             | Yes                | Yes         |
| 131111    | <b>Management Analysts**</b>                                | 2.35           | 1,869    | 35.65            | 18.64 | 5             | Yes                | No          |
| 112021    | Marketing Managers  | 1.88           | 295      | 53.42            | 27.25 | 5             | Yes                | No          |
| 172141    | Mechanical Engineers  | 0.83           | 271      | 37.01            | 22.94 | 5             | Yes                | Yes         |
| 119111    | <b>Medical and Health Services Managers**</b>               | 2.06           | 422      | 50.14            | 31.41 | 5             | Yes                | No          |
| 252022    | Middle School Teachers, Exc. Special & Voc. Education       | 1.92           | 1,239    | 31.23            | 23.66 | 5             | No                 | No          |
| 132052    | Personal Financial Advisors                                 | 2.67           | 575      | 39.63            | 17.73 | 5             | Yes                | No          |
| 291071    | Physician Assistants  | 2.75           | 174      | 46.06            | 35.42 | 5             | Yes                | Yes         |
| 272012    | Producers and Directors                                     | 1.14           | 239      | 32.07            | 17.58 | 5             | Yes                | No          |
| 112031    | <b>Public Relations Managers**</b>                          | 1.55           | 70       | 52.89            | 32.49 | 5             | Yes                | No          |
| 273031    | Public Relations Specialists                                | 2.11           | 608      | 28.57            | 17.14 | 5             | Yes                | No          |
| 291111    | <b>Registered Nurses*</b>                                   | 2.31           | 6,865    | 31.31            | 23.58 | 4/5           | Yes                | Yes         |
| 112022    | Sales Managers  | 1.34           | 604      | 62.26            | 30.47 | 5             | Yes                | No          |
| 252031    | Secondary School Teachers, Exc. Special and Voc. Ed.        | 0.93           | 1,451    | 32.53            | 24.28 | 5             | No                 | No          |
| 413031    | Securities and Financial Services Sales Agents              | 1.05           | 756      | 42.35            | 18.62 | 5             | Yes                | No          |
| 151133    | Software Developers, Systems Software                       | 2.55           | 537      | 43.61            | 29.95 | 5             | Yes                | Yes         |
| 252053    | Special Education Teachers, Middle School                   | 2.26           | 198      | 32.87            | 24.14 | 5             | No                 | No          |
| 252041    | Special Education Teachers, Preschool - Elementary          | 2.27           | 489      | 32.57            | 23.82 | 5             | No                 | No          |
| 193051    | Urban and Regional Planners                                 | 1.77           | 93       | 31.14            | 22.12 | 5             | Yes                | No          |
| 252032    | <b>Vocational Education Teachers, Secondary School**</b>    | 0.20           | 151      | 33.37            | 21.78 | 5             | No                 | No          |

†SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

\* Entrance into the occupation can be obtained with either an associate's degree or a bachelor's degree. Due to the strong labor market demand for registered nurses, this occupation is being recommended for targeting by both the workforce system ( 2 years or less programs) and by the four year degree institutions as well.

\*\* Entrance into the occupation is typically obtained with a bachelor's degree accompanied by relevant work experience.

2013-14 High Demand Occupations Requiring a  
Master's or Higher Degree  
Wage Criteria Indexed by 2012 Q2 Employment Cost Index  
Sorted by Occupational Title

Workforce Estimating Conference Selection Criteria:

- 1 FLDOE Training Code 6 (Master's or Higher Degree)
  - 2 50 annual openings and average growth rate of 1.55% or 150 annual openings with any positive growth
  - 3 Mean Wage of \$29.33/hour (\$61,006/year) and Entry Wage of \$20.53/hour (\$42,702/year)
- Note: The mean wage of \$28.85 and the entry wage of \$20.19, adopted as criteria in 2011, were indexed to Second Quarter 2012 with the Employment Cost Index.

| SOC Code† | Occupational Title†                                   | Annual<br>Percent<br>Growth | Annual<br>Openings | 2012 Hourly Wage |       | FLDOE<br>Training<br>Code | In EFI<br>Targeted<br>Industry? | STEM<br>Occupation? |
|-----------|---|-----------------------------|--------------------|------------------|-------|---------------------------|---------------------------------|---------------------|
|           |   |                             |                    | Mean             | Entry |                           |                                 |                     |
| 291061    | Anesthesiologists                                     | 2.50                        | 84                 | 125.76           | NA    | 6                         | Yes                             | Yes                 |
| 171011    | Architects, Except Landscape and Naval                | 2.24                        | 230                | 38.02            | 23.33 | 6                         | Yes                             | Yes                 |
| 251121    | Art, Drama, and Music Teachers, Postsecondary         | 2.40                        | 164                | 42.84            | 23.60 | 6                         | No                              | No                  |
| 251042    | Biological Science Teachers, Postsecondary            | 2.10                        | 101                | 52.30            | 29.91 | 6                         | No                              | Yes                 |
| 193031    | Clinical, Counseling, and School Psychologists        | 1.77                        | 198                | 33.55            | 23.63 | 6                         | Yes                             | No                  |
| 251122    | Communications Teachers, Postsecondary                | 2.22                        | 78                 | 43.75            | 26.97 | 6                         | No                              | No                  |
| 291021    | Dentists, General                                     | 1.88                        | 396                | 71.66            | 36.71 | 6                         | Yes                             | Yes                 |
| 251081    | Education Teachers, Postsecondary                     | 2.34                        | 119                | 48.00            | 30.27 | 6                         | No                              | No                  |
| 251032    | Engineering Teachers, Postsecondary                   | 2.17                        | 86                 | 68.97            | 39.99 | 6                         | No                              | Yes                 |
| 251123    | English Language & Literature Teachers, Postsecondary | 2.13                        | 149                | 44.12            | 26.20 | 6                         | No                              | No                  |
| 291062    | Family and General Practitioners                      | 2.19                        | 286                | 83.89            | 38.88 | 6                         | Yes                             | Yes                 |
| 251071    | Health Specialties Teachers, Postsecondary            | 2.41                        | 480                | 67.51            | 29.02 | 6                         | No                              | Yes                 |
| 291063    | Internists, General                                   | 2.45                        | 127                | 104.74           | 58.53 | 6                         | Yes                             | Yes                 |
| 231011    | Lawyers   | 2.00                        | 2,119              | 58.58            | 25.38 | 6                         | Yes                             | No                  |
| 251022    | Mathematical Science Teachers, Postsecondary          | 2.04                        | 122                | 44.61            | 27.26 | 6                         | No                              | Yes                 |
| 191042    | Medical Scientists, Except Epidemiologists            | 4.60                        | 159                | 43.61            | 20.76 | 6                         | Yes                             | Yes                 |
| 251072    | Nursing Instructors and Teachers, Postsecondary       | 2.26                        | 115                | 46.10            | 31.54 | 6                         | No                              | Yes                 |
| 291122    | Occupational Therapists                               | 2.63                        | 316                | 38.95            | 28.57 | 6                         | Yes                             | No                  |
| 291041    | Optometrists  | 1.80                        | 91                 | 62.86            | 26.00 | 6                         | Yes                             | Yes                 |
| 291065    | Pediatricians, General                                | 2.48                        | 54                 | 79.53            | 47.80 | 6                         | Yes                             | Yes                 |
| 291051    | Pharmacists   | 1.92                        | 806                | 54.66            | 46.24 | 6                         | Yes                             | Yes                 |
| 291123    | Physical Therapists                                   | 2.59                        | 492                | 40.13            | 28.99 | 6                         | Yes                             | No                  |
| 251066    | Psychology Teachers, Postsecondary                    | 2.36                        | 95                 | 51.04            | 30.48 | 6                         | No                              | No                  |
| 291127    | Speech and Language Pathologists                      | 1.85                        | 260                | 34.16            | 22.43 | 6                         | Yes                             | No                  |
| 291067    | Surgeons  | 2.35                        | 89                 | 110.99           | NA    | 6                         | Yes                             | Yes                 |
| 291131    | Veterinarians   | 2.81                        | 159                | 48.89            | 28.75 | 6                         | Yes                             | Yes                 |

†SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.



## Performance Council Webinar

MAY 9, 2013

10:00 A.M. TO 12:00 NOON

CALL IN NUMBER: 1-888-670-3525 CONFERENCE CODE: 769 481 6221#

<http://wfl.adobeconnect.com/wfpc/>

- |   |   |
|---|---|
| <b>I. Welcome &amp; Introduction</b>  | <i>Britt Sikes</i>  |
| <b>II. Chairman's Remarks</b>   | <i>Britt Sikes</i>  |
| <b>III. Self Introductions</b>  | <i>Council Members</i>                                    |
| <b>IV. Review of Today's Agenda</b>   | <i>Britt Sikes</i>  |
| <b>V. Presentations</b>   |   |
| • Florida Workforce Scorecard (Florida Chamber Foundation)                          | <i>Tony Carvajal &amp; Rick Sessa</i>                     |
| • Florida Workforce Integrated Performance Reporting System (FWIPRS)                | <i>Richard Williams, James Finch, &amp; Telly Buckles</i> |
| • USDOL Common Measures—Performance Update  | <i>James Finch &amp; Tony Carter</i>                      |
| • Overview of Training Services to RWB's (DEO Strategic Training Coordination Unit) | <i>Lois Scott &amp; Erica Mott</i>                        |
| <b>VI. Open Discussion</b>  |   |
| <b>VII. Chairman's Closing Remarks / Adjourn</b>                                    | <i>Britt Sikes</i>  |



**Performance Council**  
**Meeting Summary**  
**Thursday, February 21, 2013**

**Members Present:**

Dan Baldwin  
Kevin Doyle, Vice Chair  
Matthew Falconer  
Dr. Bill Law  
Britt Sikes, Chairman

**Members Not Present:**

Mike Carroll  
Don Gugliuzza  
Linda Reiter  
Steve Parrish  
Steven Sonenreich

Chairman Britt Sikes welcomed the Performance Council members and audience to the Performance Council meeting. Chair Sikes noted the name of the Performance & Accountability Council was changed to the Performance Council. The State of Florida has a performance system to brag about and also to share best practices among all members of the system. Chair Sikes asked the participants to review the Board Program and to be sure and thank the generous sponsors of the February Board meeting. Mrs. Peggy Dransfield was recognized to conduct the roll call of Council members.

Mr. Kevin Doyle was recognized as the Performance Council Co-Chair. Chair Sikes noted he and Kevin have had several conference calls regarding plans for this year and their commitment to accomplishing some goals to move the system forward. He expressed his appreciation to Kevin. The members introduced themselves and shared background, organizational representation and thoughts on serving on the Council. The Chair provided an overview of the Council agenda referencing Tab 13 in the Board package and introduced Mr. Rick Sessa to provide an update on the Florida Workforce Scorecard.

Mr. Rick Sessa commented on the initial developmental work of the Florida Workforce Scorecard identifying monthly and quarterly metrics tracked by the Chamber of Commerce Foundation aligned with the workforce system and recently moved to quarterly reporting. Mr. Sessa provided findings related to Workforce Florida Board priority areas of Talent Supply and Education; Innovation and Economic Development; and Business Climate and Competitiveness. In the Talent Supply and Education areas, Mr. Sessa summarized reading and writing scores are higher than national trends based on National Assessment of Education Progress data. However, eighth grade mathematics scores in 2011 were five (5) points lower than the U.S average. Within the Innovation and Economic Development priority, trade activity has been an emphasis. Exports increased 2.8% from November 2011 to November 2012 reflecting a downward trend from the previous year of 17%. This is possibly due to export price inflation. Additionally, small businesses are identifying access to capital as the number one concern. Increased import activity is reflecting a significant upward trend reaching approximately \$6.4 billion – the highest rate since the recession. The Business Climate and Competitiveness metrics include tracking unemployment rates. Florida’s seasonally adjusted unemployment rate was 8.0% in December 2012, down 1.9 points from December 2011. Currently, 749,000 Floridians are officially unemployed. Forecasts indicate Florida’s economic recovery will continue to strengthen in 2013. Economic and workforce indicators include US real Gross Domestic Product (GDP) and analyses over a two-year period. Workforce indicators include the number of reemployment assistance claimants. The average number of claimants fell by 9.8% when compared to the third quarter. A 43.2% in the monthly average number of reemployment assistance claimants were placed into jobs in quarter four as compared to quarter three. Per Capita is rising at a slow rate. Based on the Florida Chamber of Commerce Small Business Survey in quarter four, hiring uncertainty (58%) was ranked as the highest issue. Mr. Sessa also noted a new portion added to the Council’s quarterly reports—tracking High Demand Occupations to include the median hourly wage. Registered nurses and Retail Sales Persons ranked as the top two occupations, with computer systems analysts (\$38.00) has the highest hourly rate within the top eight ranked demand

occupations. The Florida Workforce Scorecard includes data-driven measurements by region. Common Measure data by region will be added based on data from the Department of Economic Opportunity. This Phase II of the Scorecard development will also include a Data Description Guide and an Orientation Tool-kit.

Mr. Matthew Falconer asked Mr. Sessa to review economic factors relating to gas prices at the national and Florida levels. He also asked what small businesses might do to enhance their access to capital. Mr. Sessa described a recent survey to credit unions and small community banks to determine feedback from the lending community on how regulations affect their ability to provide loans. The Chamber is conducting research to receive public policy recommendations from lending institutions to allow small businesses to have access to capital. Additionally, venture capital funding is emphasized since Florida receives a small base of venture capital funds in relation to Florida serving as the fourth largest state.

Mr. Dan Baldwin requested information on the individuals who have discontinued their job search and potential numbers of individuals. Mr. Sessa noted there is a moving average of alternative measures of labor and one measure includes workers who are “marginally-attached” which attempts to capture discouraged workers—if a job is offered, these individuals would accept the position and this measure also includes part-time workers who are under-employed. Florida’s average is within 16%-17%.

Mr. Doyle requested information on discussions of sequestration and impact to Florida’s GDP, especially relating to defense spending. Mr. Sessa noted a George Mason University study on the effect of sequestration in the year of 2013 and Florida’s impact would be potentially higher than many states due to defense federal funding allocations.

Mrs. Mary Lazor expressed appreciation to Mr. Matthew Falconer for his suggestion of enhancements to the Workforce Florida Scorecard indicating follow-up action has been taken by the Chamber to respond with tools such as the Data Description Guide and Orientation Tool-kit.

Chair Sikes asked Mr. James Finch and Mr. Telly Buckles to provide a demonstration of the Florida Workforce Integrated Performance Reporting System (FWIPRS). Mr. Finch introduced the value of FWIPRS to the Performance Council and the Board in establishing policy through data-driven metrics. Mr. Finch also shared with the Council additional initiatives within the Performance unit to provide parents and students with tools to assist with educational/career planning; universities graduating students who are employed, rate of employment and wages.

Recognition was expressed by Mrs. Lazor for the work of the Performance Unit and local Regional Workforce Boards in developing FWIPRS. This system serves case managers, RWB executive directors and eventually local boards and the state Workforce Florida Board with the capacity to reflect data by region and with many diverse components. Mr. Buckles provided an on-line demonstration of FWIPRS noting metrics important to the Board, local regional boards and other statewide stakeholders (e.g., Governor, legislators, business, educators, etc.). Metrics are displayed as strategic and tactical measures. Data by region was displayed by program, demographics; employment status; educational levels and years of service. There are approximately eight (8) million individuals in the system. Mr. Buckles shared system graphics of certain populations by program and how FWIPRS may provide RWB Executive Directors with data for management and resource decisions. There is an estimated 1.8 million individuals utilizing the system within any given quarter. Mr. Buckles focused on three (3) common measures and regional progress—Adults and Dislocated Workers--Entered Employment Rate; Employment Retention and Earnings over a 6-month Period. Data sources were also provided to reflect Florida and national workforce measures.

Mr. Matthew Falconer asked about individuals who enter and exit positions and the number of new positions. Mr. Buckles noted the Chamber Foundation and the DEO Labor Market Statistics unit would have information on employers and whether individuals received increased wages in the same position. Mr. Finch noted Unemployment Compensation Business Reports are also utilized to build the database for FWIPRS.

Chair Sikes referenced the WFI mission to enter, remain and advance and in discussions with Kevin and Mary discussed the challenge to assist individuals to remain and advance. Mr. Buckles stated with the focus on reemployment claimants, the system tracks re-entry into the system. So, the question becomes why the individual returned to the system, possibly a positive return to advance. Chair Sikes noted once we determine the reason of re-entry, the Council is better positioned to assist the client. Mr. Buckles shared this type of individual diagnosis of re-entry should be possible and would follow-up on the resources available to add this function.

Mr. Baldwin asked if we can distinguish action taken when an individual left and returned to the system and whether we can determine if that position was temporary in nature. Mr. Buckles responded – yes, if an internal job order was established. This would be a small population. Otherwise, employer tracking would be required by individual by quarter. Internal job orders also specify the term of positions. Mr. Buckles also noted information is available to reflect if the individual is working with a staffing agency.

Mrs. Lazor requested an update, as previously requested President Law, on the educational levels and placement. Mr. Buckles described four major metrics—age, educational level, race and gender—for each individual to project outcomes. These components are requested at registration and now woven throughout FWIPRS.

Chair Sikes expressed appreciation to the DEO/RWB Resource Team for their continued development of the Florida Workforce Integrated Performance Reporting System (FWIPRS).

As the Chair moved to the next performance agenda item, he recognized the great and impressive support of the DEO Performance Unit. The Team places thought on the “how” with information analysis and extremely flexibility for the Performance Council.

Mr. James Finch began the discussion of the Common Measures update with an additional status report on the reemployment assistance claimants’ registration. Full registration is now mandated for claimants to receive assistance. This will allow for additional information to assist individuals in returning to employment (e.g., previous occupations, educational levels, email contact, etc.). Mr. Finch summarized the 2012 legislative requirement to visit each regional workforce board to present regional performance reports. There has been good news to report and invited Council members to participate in local board presentations. Mr. Tony Carter briefed the Council on 2012-2013 USDOL negotiation of Common Measures. Common Measures, first implemented in 2005, replaced the previous 17 workforce measures. Florida has 12 Common Measures—three WIA Adult Measures; three WIA Dislocated Worker Measures, three Youth Measures and three Wagner-Peyser Measures-which are general job seekers. Mr. Carter reviewed the matrix reflecting the 2012-2013 Performance Goals, and quarterly progress during the year. Federal official performance reporting is due October 1. The official performance reporting determines whether the state is eligible for performance incentives or if state sanctions are needed for any reason. The 2<sup>nd</sup> Quarter Report (October – December 2012) was provided with a description of the federal standards requiring 80% of performance goals as a threshold. If a state is at 80% or more of the goal, the state has met the goal. All nine (9) WIA Common Measure goals have been met according to the federal 80% requirement. Florida has established “stretch” goals. Three of the nine measures are above the “stretch” goals. Trend data was also displayed for each of the Common Measures. Mr. Carter reminded the Council Florida has met all of the negotiated standards since Common Measures were

implemented. 2012-2013 is the first year Florida has been required to re-negotiate standards in the last five years. The goals were negotiated based on the platform of increasing Florida's goals will also positively influence increased performance. The state will be required to annually re-negotiate performance goals-beginning this year in April/May.

President Law complimented Mr. Carter on the preparation and display of the data and asked Mr. Carter to outline the process for determining goals. Initial analyses of Common Measure data are conducted. These results are reviewed with WFI for discussion with objective of encouraging high standards. These standards are submitted to the Executive Office of the Governor and adjusted. Mr. Finch noted during the negotiation discussions, US Department of Labor representatives were impressed with the goals. President Hart added comments on USDOL's offer to assist with performance achievements.

Chair Sikes expressed appreciation to Mr. Finch, Mr. Carter and their team. Once again, Florida's Workforce System has been recognized.

As a component of the Open Discussion agenda item, Ms. Becky Rust, Labor Market Statistics, provided the Council with an update on the development of the Occupational Supply/Demand Information System. The local regional workforce boards initiated the need for the system during the recession. Development has occurred to match training by occupation. Ms. Rust reviewed a system report reflecting occupations; potential supply indicators; demand and other occupational information. Details in the report also included enrollees; completers; job seekers; supply-demand gap information; and additional occupational information such as wages and educational levels. The Occupational Supply/Demand System allows for decisions on additional training needs for occupations in demands. Students utilize the information to determine higher placement opportunities. Future uses will include tools for education providers. The Governor has emphasized continuing to build the tool for use by parents and students. The USDOL provided a competitive grant opportunity to merge workforce and education data. Florida's Labor Market Statistics unit was one of the states to receive the grant award and is now in the third year of implementation. Reports have been distributed to the regions on a quarterly basis with plans for a monthly distribution and to launch as a live system. The primary purpose is to align education and workforce training with the job market.

Mr. Kevin Doyle expressed his appreciation for the system and encouraged the use of these tools within the system. Ms. Rust emphasized the use of the Occupational Supply/Demand Information System as an economic development tool such as business recruitment.

Chair Sikes noted the Council has discussed short-term and long-term demands, noting a high percentage of jobs for 5<sup>th</sup> graders do not exist today. Mr. Sikes asked if consideration has been given to determine future employment opportunities and careers. Ms. Rust noted statistical systems require occupational demands must be large enough to survey the business community to receive the trends in hiring—currently 800 occupations within the Standard Occupational Classification (SOC) system. If an occupational title is not within the occupations listed, businesses may add the title and then at the national level, a process is conducted to determine if the position is a new and emerging occupation.

Mrs. Lazor shared information on Workforce Florida's Target Industry Cluster Task Forces and their work to conduct comprehensive studies within industries as identified by Enterprise Florida, Incorporated to prepare for long-term industry needs.

President Law noted a recent panel discussion for a legislative review of workforce related issues and expressed the value of the Occupational Supply/Demand Information System. Important information is relayed through the identification of industry needs and the translation to what this means for specific jobs. President Law urged the Council to conduct a live demonstration of the System. Individual

colleges/educational institutions rely on this type of data. The Governor has emphasized performance funding—type of degree; number of graduates; placement in field and wages.

Mr. Baldwin applauded the System to enhance early educational decisions on the part of college students. Chair Sikes also noted discussions with Kevin and Mary on impacting the workforce system by identifying a surplus of workers and responding to businesses needs within areas of critical need. Chair Sikes expressed appreciation to Ms. Rust.

Chair Sikes requested the Performance Council to consider the mission—to enter, remain and advance. As a priority to address “entering” the workforce system, Mr. Sikes challenged Council members to visit local Regional Workforce Boards to look at best practices. There are differences within rural and urban regions, so Mary has been asked to map regional visit opportunities for the members each quarter. By seeking best practices, the Council will then have information on where further implementation may occur across the workforce system.

To address “remain and advance” workforce initiatives, the Common Measures report provides for performance progress. As we visit the regions, consider metric(s) in the areas of remaining and advancing in the workforce. Additionally, identify skill gaps of today and emerging to assist companies in building their businesses and also to recruit new businesses to the state. President Law suggested a collaborative laboratory experience to identify outside advisors within specific occupational areas. Mr. Doyle reinforced the importance of local visits to solidify the workforce system as one system with the same goals. Chair Sikes recommended members’ participating in the Performance Presentations within the regions.

Chair Sikes expressed his gratitude to President Hart, the presenters and members of the audience. He also expressed appreciation to Mary as the Council Staff lead.

The meeting was adjourned at 10:45 am.



2013: Quarter One

# Florida Chamber Foundation-Florida Workforce Scorecard Initiative



Prepared by the Florida Chamber Foundation  
in partnership with Workforce Florida, Inc.

January-March 2013

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## Section I. Florida’s Short-Term Economic Outlook:

Florida’s economy expanded at a moderate pace during the first two months of 2013, and key economic indicators suggest that the state’s economy will continue this expansion in the months ahead.

A strong predictor of Florida’s economic performance over the next two quarters is the Philadelphia Federal Reserve Bank’s Leading Economic Index for Florida. This index attempts to forecast economic growth over a six month period using new building permits, initial claims for unemployment, interest rates, and ISM manufacturing delivery times. In the fourth quarter of 2012, this index averaged approximately 1%. Yet, during the first two months of 2013, this indicator has averaged 1.52%. This suggests that we may see stronger economic performance and job growth in the months ahead when compared to 2012.

The state’s economic recovery has been slow in the past few years as Florida’s housing market recovered from its disproportionate exposure to the housing crisis. 2012 provided evidence that the housing market is experiencing a sustained recovery, and key metrics for building permits suggest that home construction will accelerate into the 2013 year. Furthermore, as home prices increase we can expect a “wealth” effect which should spur additional consumer spending during the year ahead. It will be imperative to track the recovery of the housing market as the industry’s health is related to the overall economic recovery and the creation of jobs for Floridians.

According to TD Economics, Florida’s real gross state product (GSP) is expected to grow by 2.5% in 2013, slightly faster than the projected U.S. real GDP growth rate of 1.9%.<sup>1</sup> Gross state product measures the total value of all final goods and services produced by labor and capital in Florida. It is the key indicator of economic expansion and contraction for analyzing a region’s business cycle. Moreover, the forecast expects that housing starts and home prices will increase at a faster rate in 2013 when compared to 2012—providing further confirmation that 2013 is likely to be a better year for many metrics of economic performance.

NOTE: Forecasts are provided for general information purposes only, and the Florida Chamber Foundation shall not be held liable for losses or damages resulting from the use of the above forecast. Forecasts are subject to change as new information becomes available.

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<sup>1</sup> TD Economics. TD State Forecasts. March 28<sup>th</sup>, 2013.

## II. Trends in 2013:Q1 and Implications for Florida's Workforce Talent Supply & Education and Workforce Florida's Strategic Projects

The supply of talent in Florida has been recognized by many partners across the public and private sectors as critical to producing an innovation economy that will power the jobs of tomorrow. In order to provide an appropriately skilled labor force for both today's businesses as well as emerging industries, efforts of Workforce Florida have focused on strategic projects surrounding a **Talent Supply Chain for High Performance in the Strategic Plan** as well as **STEM** (Science, Technology, Engineering and Math) **Leadership for Florida**.

An assessment of trend analysis and reports released January-March 2013 indicates the following:

Florida continues to make performance gains in talent supply and education. This pillar's performance will be important to watch as the state moves toward the implementation of Common Core standards to make the education system more competitive. Yet, policy makers should consider international levels of educational performance to ensure Florida remains competitive with respect to other countries.

According to a recent 2011 *Progress in International Reading Literacy Study*, Florida ranks 2<sup>nd</sup> to Hong Kong for its average scaled fourth grade reading score. Florida's education system achieved an average score of 569 on reading, which was significantly greater than the U.S. average score of 556.<sup>2</sup> Hong Kong managed to rank first with a scaled score of 571.

While Florida's fourth graders outperformed in terms of reading performance, room for improvement remains in the subject of mathematics and science. In particular, Florida's fourth

graders achieved a 545 scaled score on a *Trends in International Mathematics and Science Study* examination. Florida ranked 9<sup>th</sup> in mathematics when compared to other countries, and managed to outperform the U.S. which achieved a scaled score of 541. Florida's fourth graders ranked 7<sup>th</sup> internationally in science testing, but managed to beat the U.S. average by a mere point.

While Florida's fourth grade academic performance appears to be internationally competitive according to the aforementioned studies, we conclude that Florida has the most to gain in the middle and high school years. The ranking of Florida's students in all three subjects were lower for eighth graders when compared to their fourth grade counterparts. This suggests that performance is not as competitive in eighth grade when using an international standard. Florida has an opportunity to increase education performance in higher grade levels of the K-12 system. Continued progress will be imperative to improving job and wage outlooks for future cohorts of high school and college graduates.

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<sup>2</sup> Florida Department of Education. 2013.

## **Innovation & Economic Development and Workforce Florida's Strategic Projects**

The technological change and increased efficiencies brought about by innovative methods will continue to shape and drive Florida's economy. Workforce Florida has recognized the importance of meeting the changing workforce demands of an economy which is influenced by innovation through a strategic project that aims to provide real-time information on the **Workforce Supply and Demand Analysis** in Florida. As new companies form and existing businesses expand they will look to hire workers with the necessary skills to meet their business demand.

An assessment of trend analysis and reports released January—March 2013 indicates the following:

One of the primary economic development indicators for the state of Florida is the value of international trade. With the close of the 2012 year, recent figures show that Florida-origin export growth slowed dramatically in 2012. Export growth registered a dismal 2.3% in 2012 when compared to over 17% in 2011.

This slowing growth rate in Florida-origin international exports can partially be explained by the large export price inflation we observed in 2011. The dramatic 17.2% increase in 2011 is in part due to increasing export prices in addition to an increase in the volume of exports from Florida. However, even when adjusting for price levels we find that Florida's quantity of exports to its trading partners did increase significantly in 2011.

As of February 2013, Florida has exported \$10,041.1 million in value year-to-date. When compared to the same period in 2012, Florida's export value has decreased by 1.4%. It is important to note that trade data is not seasonally adjusted. While we did observe a decrease in exports moving into the first quarter of 2013, we expect that this is a result of the typical slump in trade that occurs in the

beginning of the year. We expect that as Florida's economy continues to expand in the months ahead that trade should begin to increase in the near future.

It will be critical to monitor the international trade indicators on the Florida Scorecard during the 2013 year, as export and import activity supports a large segment of Florida's workforce. It is important to note that as these metrics are highly volatile from month to month, the trend is often more indicative of economic progress than the month-to-month changes in trade activity.

While international trade figures were subpar in the first two months of 2013, new visitors data suggest that Florida witnessed another consecutive record year for tourism in 2012. During the 2012 year, Florida welcomed a record 89.3 million visitors to the state from domestic and international sources. This increase represents a 2.3% increase from 2011. The number of international visitors increased by 9.0% from 2011 to 2012—a positive data point for Florida's tourism economy as international visitors tend to stay longer and spend more during their stays.

## **Business Climate & Competitiveness and Workforce Florida's Strategic Projects**

Communication and sharing of knowledge between Florida's industries and workforce development partners is critical to ensure a business climate that is competitive regionally, nationally and internationally. To help meet the informational need, this initiative serves to provide detailed analysis to support Workforce Florida's strategic project producing **The Best Informed Target Industry Cluster-specific Task Forces**.

An assessment of trend analysis and reports released January—March 2013 indicates the following:

Florida's business climate has made significant gains in the first quarter of 2013. In terms of job creation, unemployment, and housing Florida's economy expanded at a faster rate during the first two months of 2012 when compared to the previous two months. In addition, while the increase in the payroll tax rate went into effect in January 2013—changes in consumer demand seem to be minor in nature.

Florida employers have added 27,600 new non-agricultural positions in the first two months of 2013. This signals that the state's economy is still growing at a moderate pace as firms typically require additional labor to increase the level of output of goods and services. While Florida still requires over 500,000 positions to regain the pre-recession peak employment level, the state is making progress toward this goal.

Florida's coincident index of economic activity increased during the first two months of 2013. The coincident index of economic activity attempts to measure the

amount of economic activity occurring in the state during a given month. The index is based on four primary factors/indicators including unemployment, employment, hours worked in manufacturing, and wages/salaries. As this index continues to increase, we are confident that Florida's business climate is still healing from the damage of the 2007 recession.

The recent expiration of the U.S. payroll tax cut caused slight erosion in the quality of Florida's business climate, though recent data suggest that the impact of the tax increase was minimal.

Indeed, the size of the tax increase was too small to cause a significant change consumer behavior. Secondly, this policy action was national in nature and will not result in Florida becoming less competitive relative to other states. Florida's ability to maintain a zero-income tax environment should promote the quality of its business climate in the years ahead.

### Section III. Overview of Economic and Workforce Indicators

#### Economic Indicators 2012: Q4

|                                    | Current Quarter | Year Ago    | Over the Year |         | Quarter Ago | Over the Quarter |         | 2012 Q4     |
|------------------------------------|-----------------|-------------|---------------|---------|-------------|------------------|---------|-------------|
|                                    | 2012 Q4         | 2011 Q4     | Level         | Percent | 2012 Q3     | Level            | Percent | US Value    |
| <b>Per Capita Personal Income</b>  | \$41,735.34     | \$40,027.25 | \$1,708       | 4.27%   | \$40,818.14 | \$917            | 2.25%   | \$43,369.76 |
| <b>Real GDP (US)</b>               | \$13,665.40     | \$13,441.00 | \$224.40      | 1.67%   | \$13,652.50 | \$13             | 0.09%   | \$13,665.40 |
| <b>Housing Sales</b>               | 115,663         | 100,119     | 15,544        | 15.53%  | 111,229     | 4,434            | 3.99%   | 883,884     |
| <b>Non-Agricultural Employment</b> | 7,444,400       | 7,310,300   | 134,100       | 1.83%   | 7,414,300   | 30,100.00        | 0.41%   | 135,047,000 |
| <b>Unemployment Rate</b>           | 8.0%            | 9.6%        | -1.6          | -       | 8.6         | -0.6             | -       | 7.8%        |

- Source: Bureau of Economic Analysis, Zillow Real Estate Network
- Footnotes: Personal Income= Total Personal Income/Annual Population  
 Real Gross Domestic Product= in billions, Florida Real GDP is not available by quarter  
 Housing Sales= Total Sales of Homes and Condominiums  
 Employment=Current Employment Statistics

Florida’s growth in housing sales accelerated significantly in the fourth quarter of 2012. A sixteen percent year-over-year increase in housing sales suggest consumers are more optimistic about the future, as they are willing to invest in long-term high value assets. This increase in housing sales is largely due to a 27% year-over-year spike in housing sales in the month of October. The improvement in Florida’s housing market could be attributed to the improvement in Florida’s labor force; with unemployment dropping and employment and per capita income growing in the fourth quarter faster than the third quarter of 2012. With real gross domestic product still growing at a less than optimal pace, Federal Reserve policy makers are expected to keep interest rates low. This low interest rate policy will continue to help propel housing sales in Florida.

**Workforce Indicators 2013: Q1**

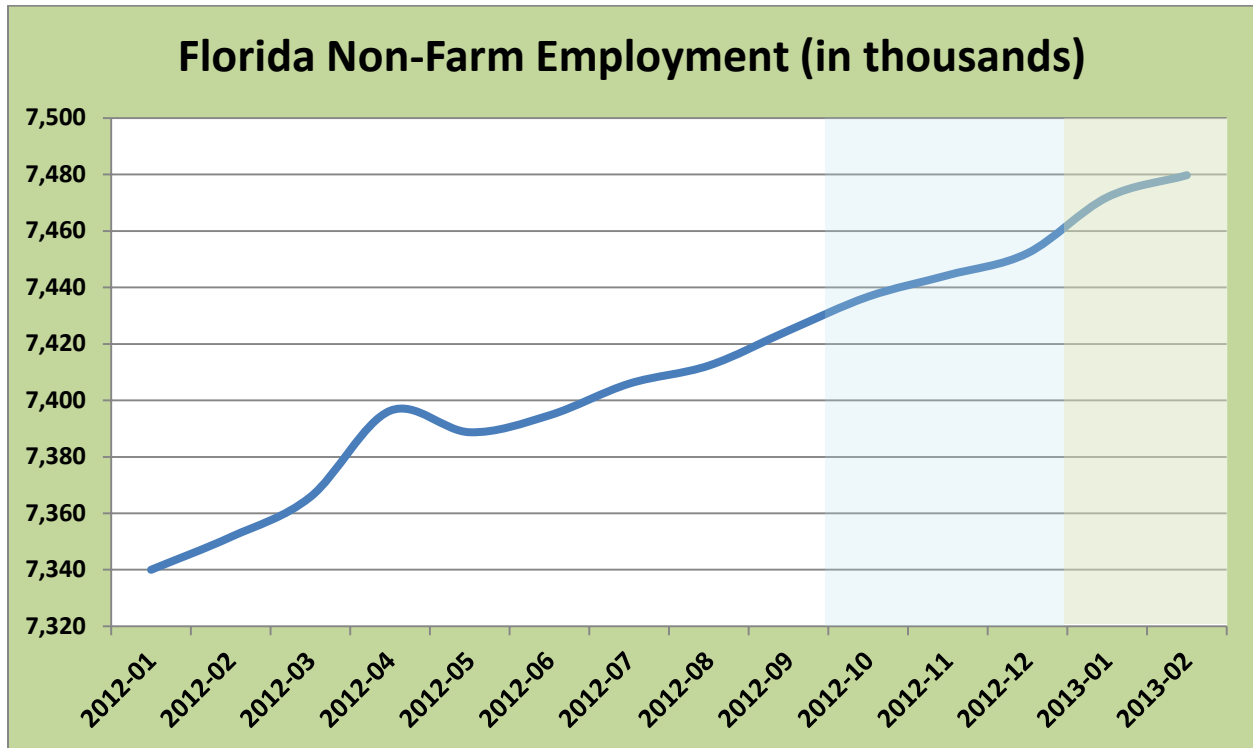
|   | Current Quarter | Year Ago | Over the Year Change |         | Quarter Ago | Over-the-Quarter Change |         |
|---|-----------------|----------|----------------------|---------|-------------|-------------------------|---------|
|   | 2013 Q1         | 2012 Q1  | Level                | Percent | 2012 Q4     | Level                   | Percent |
| <b>Average Number of Reemployment Assistance Claimants per Month</b>                      | 284,057         | 369,390  | -85,333              | -23.10% | 299,883     | -15,826                 | -5.28%  |
| <b>Number of Reemployment Assistance Claimants placed into jobs</b>                       | 30,454          | 20,695   | 9,759                | 47.16%  | 41,671      | -11,217                 | -26.92% |
| <b>Average Number of Job Openings Available per Month</b>                                 | 290,066         | 323,412  | -33,346              | -10.31% | 256,721     | 33,344                  | 12.99%  |
| <b>Number of Individuals Placed in Jobs</b>   | 108,613         | 94,539   | 14,074               | 14.89%  | 138,853     | -30,240                 | -21.78% |
| <b>Average Percentage of Job Openings Filled per Month</b>                                | 12.52%          | 9.76%    | 2.76                 | -       | 18.01%      | -5.49                   | -       |
| <b>Average Percentage of Reemployment Assistance Claimants Placed into Jobs per Month</b> | 3.57%           | 1.87%    | 1.70                 | -       | 4.62%       | -1.05                   | -       |

Source: Department of Economic Opportunity, Monthly Placement Reports

- Footnote: Quarterly statistics are calculated as the monthly average of the quarter..

Reemployment claimants continued to decline in the first quarter of 2013 when compared to the fourth and first quarter of 2012. This is consistent with the decrease in unemployment and the increase in non-agricultural employment in both Florida and the nation. While jobs available increased between quarters, the number of jobs available when compared to the first quarter of 2012 decreased by approximately 15%. This can be partially explained by the substantial improvement in employment experienced through the duration of 2012, and negative economic factors such as the “fiscal cliff” and uncertainty regarding tax changes experienced early in 2013. These negative economic factors could have contributed to a slowdown in the job placement rate, as businesses may have been hesitant to employ.

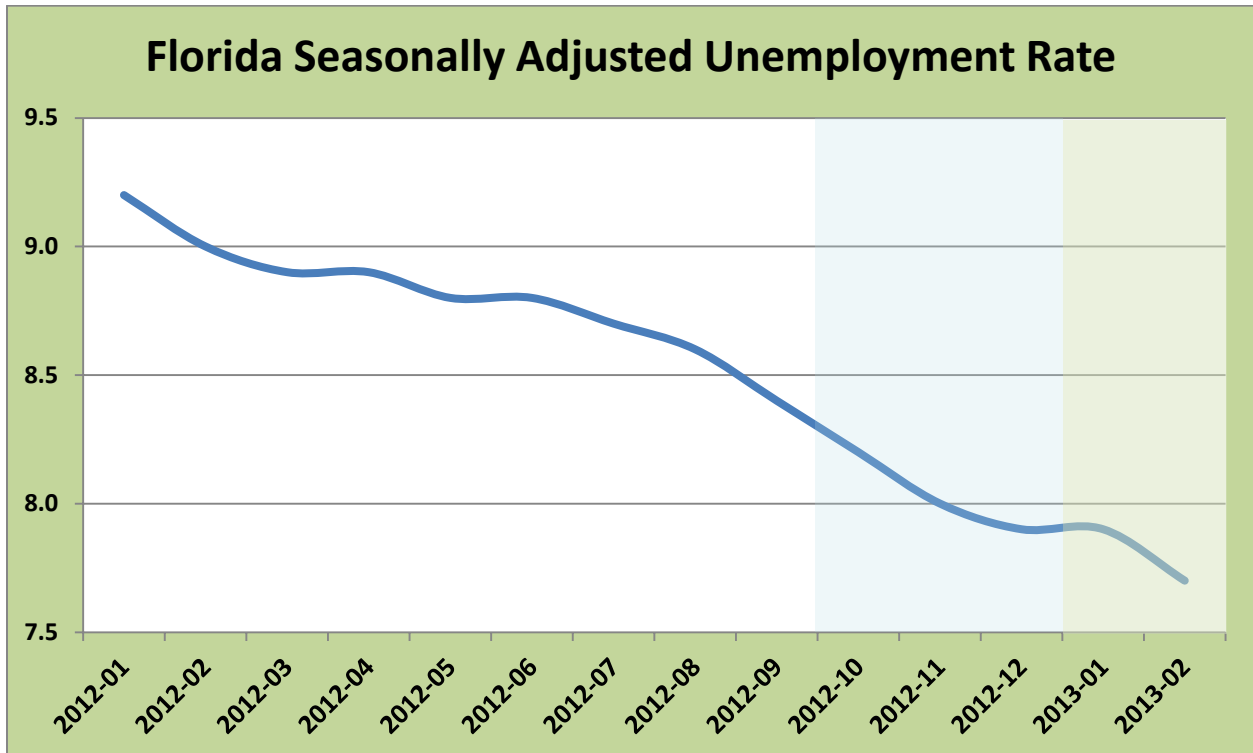




**Florida Non-Agricultural Employment:**

Florida’s non-agricultural employment has increased moderately during the first two months of the 2013 year when compared to job growth in the fourth quarter of 2012. In February 2013, Florida’s non-farm employment stood at 7,479,700—an increase of 27,600 jobs year-to-date.<sup>3</sup> In comparison, only 15,400 new jobs were added in the prior two month period. With Florida’s economic expansion expected to accelerate in 2013, non-agricultural employment should continue to rise. Non-agricultural employment is an important indicator of economic health for the state, as the figure provides more information about economic activity when compared to the unemployment rate (which is subject to sudden changes in the labor force participation rate). In general, faster job creation indicates that more goods and services are being produced by Florida’s firms, while slow growth or job losses indicate that an economic contraction may be occurring.

<sup>3</sup> U.S. Bureau of Labor Statistics



**Seasonally Adjusted Unemployment Rate:**

Florida’s seasonally adjusted unemployment rate decreased from 7.9% in December of 2012 to 7.7% in February of 2013 (the most recent month for which data is available).<sup>4</sup> This indicates that the state’s economy is likely to be expanding at a moderate pace entering the 2013 year. Fortunately, the decrease in the unemployment rate is partially a result of job creation and not merely a result of discouraged workers leaving the labor force. While the labor market is recovering, Florida’s jobs market will likely need a few additional years to regain pre-recession employment levels. The unemployment rate will be important to monitor for Florida’s economic progress, but we must consider the individual employment components of the unemployment rate. In certain circumstances, the unemployment rate may decrease if unemployed workers drop out of the labor force even if no new jobs are created by Florida businesses.

<sup>4</sup> U.S. Bureau of Labor Statistics.



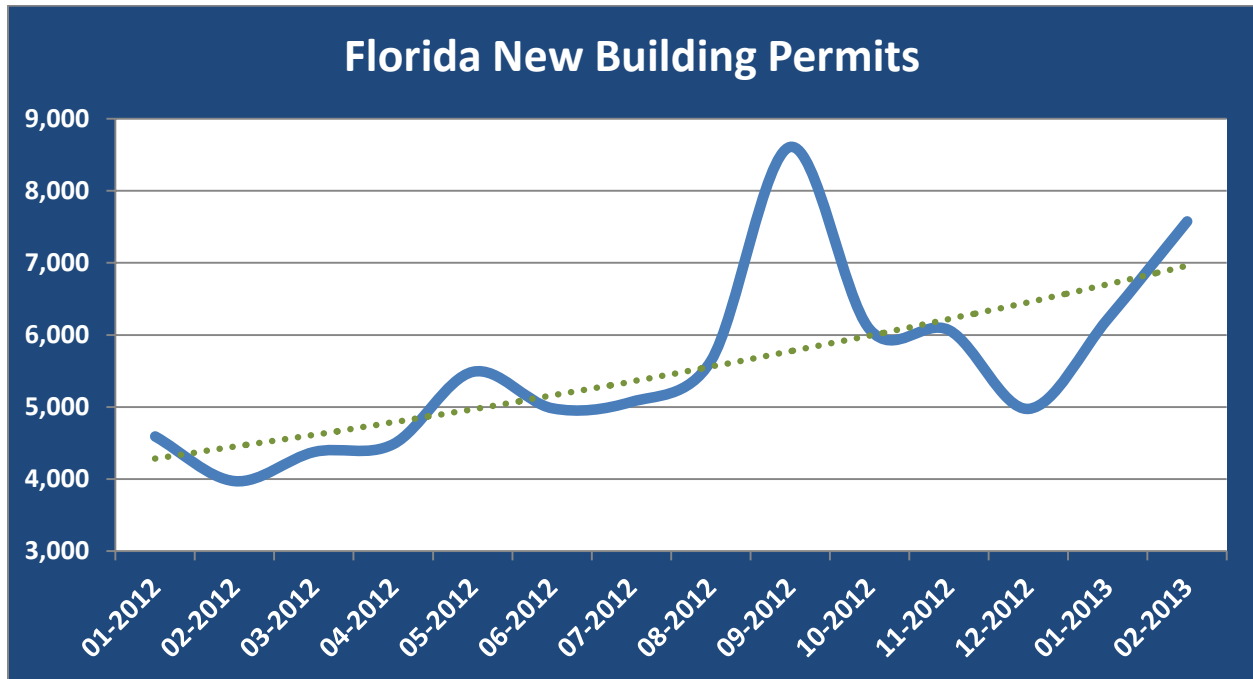
**Real GDP:**

Real Gross Domestic Product (GDP) is a measure of the total value of economic output of the national economy adjusted for inflation over time. In contrast with the standard measurement of GDP, real GDP is a preferable measure because it accurately reflects economic activity by adjusting the values in accordance with inflation or deflation. Specifically, U.S. Real GDP in 2012:Q4 was \$13,665.4 (in billions), compared to \$13,441 in 2011:Q4 and \$13,652.5 in the prior quarter.<sup>5</sup>

Real GDP has increased 1.7 percent and 0.4 percent over-the-year and over-the-quarter, respectively. The annualized growth rate in real GDP slowed considerably in the fourth quarter; however, the slowdown was mainly due to reduced government expenditures rather than a slowdown in private sector activity. We expect that the growth rate of real GDP in the first quarter of 2012 returned back to the “normal” 2-3% annualized rate of growth. Workforce professionals should track U.S. real GDP growth rates, as they tend to be highly correlated with Florida’s labor market performance. According to a recent econometric model developed by the Florida Chamber Foundation, **U.S. GDP growth tends to have the strongest impact on Florida’s workforce system with a lag of one calendar year.** According to a recent forecast by Wells Fargo Securities, U.S. real GDP growth is expected to stay around 2.0% for 2013 (partially a result of sequestration), and should accelerate to 2.4% in 2014.<sup>6</sup> Changes in federal fiscal policy could result in adjustments to these growth figures, and we can expect an additional half a percentage point of additional growth in GDP if full sequestration does not occur.

<sup>5</sup> U.S. Bureau of Economic Analysis

<sup>6</sup> Wells Fargo Securities. U.S. Economic Forecast. April 10, 2013



**Florida’s Housing Market:**

The housing recovery in Florida continues to show signs of improvement, although we did observe a slight pullback in new building permits at the end of 2012. During the first quarter, the number of new building permits issued in Florida has increased to be slightly above the trend for 2012, and this should provide support for future building. New building permits are a key leading indicator for future state economic performance as it provides information about the level of construction activity we can expect in the months ahead. Home prices have generally increased with should provide consumers with a wealth effect to spending on goods and services. Improvement in the housing market is a key driver of direct and indirect job creation, as housing has a large multiplier effect on other industries.

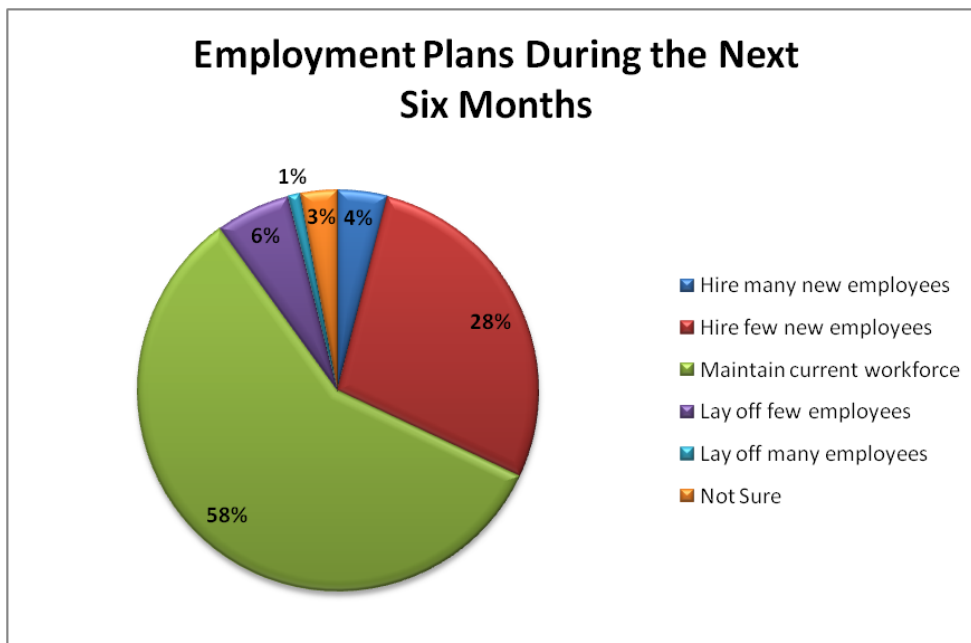
**Florida Chamber of Commerce Small Business Survey**

**Survey Results**

**Top five important issues facing Florida small businesses today:**

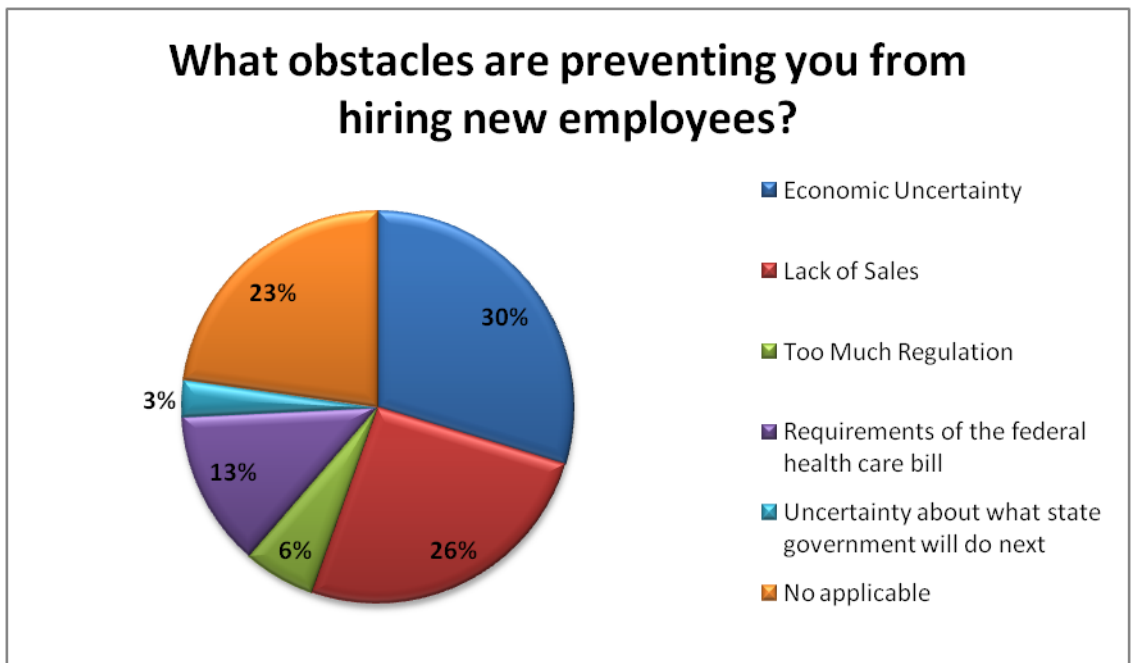
- 1. Economic Uncertainty – 34%**
- 2. Government Regulations – 13%**
3. Access to Capital – 12%
4. Healthcare Costs – 10%
5. Workforce Quality – 10%

Unlike our fourth quarter survey, participants in the first quarter indicate that “economic uncertainty” is the most important issue, rather than “access to capital.” Surprisingly, only 12% of respondents mentioned that access to capital was a top important issue facing Florida’s small businesses today. Government regulations, which previously received 7%, increased to 13% of respondents—making it the second most important issue for the survey respondents. Interestingly, 10% of the small businesses surveyed in the first quarter cited “workforce quality” as their top issue facing business.

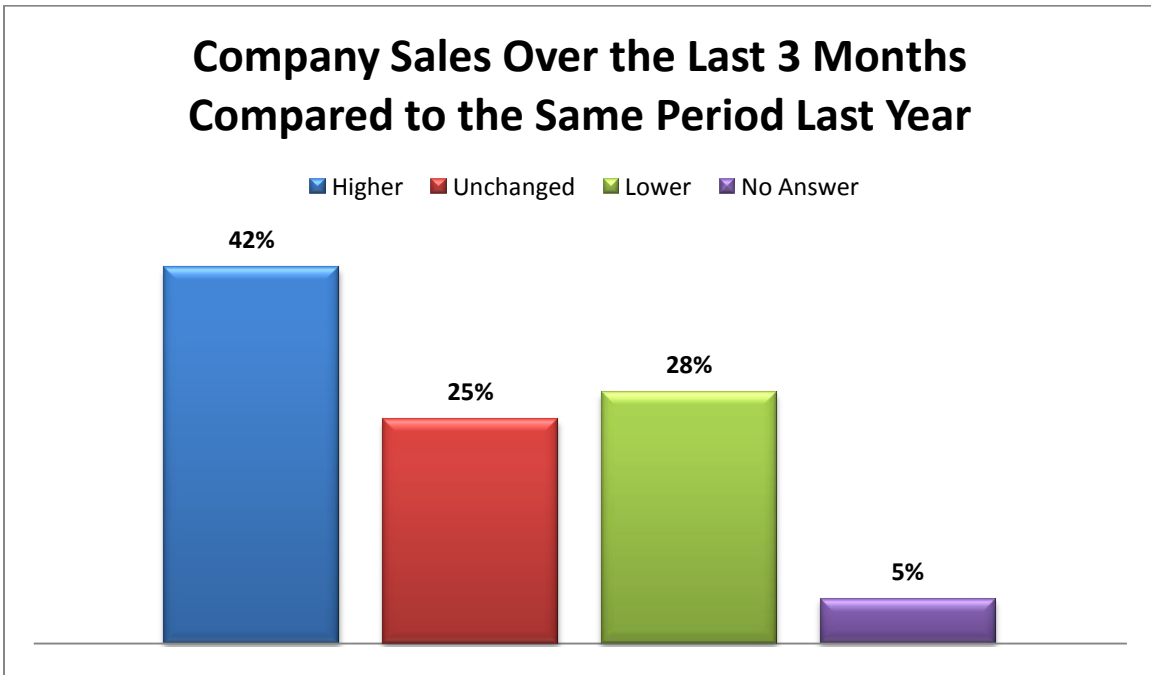


Asking Florida businesses about their employment plans can help gauge the strength of hiring in the months ahead. The first quarter survey indicated that most Florida’s small businesses expect to maintain the current workforce level at their firms.

- **Layoffs** – 7% plan to lay off employees, unchanged from the fourth quarter.
- **Hire Many New Employees** – 4% of firms plan to hire many new employees over the next six months, unchanged from the fourth quarter.
- **Hire Few New Employees**—28% of firms plan to hire few new employees over the next six months, up from 25% in the fourth quarter.



Consistent with our “top five important issues” results, small businesses claim that economic uncertainty is a significant obstacle to hiring new employees. 30% of small businesses surveyed cited economic uncertainty as the largest obstacle to hiring; 26% said the largest obstacle was lack of sales; and 13% referenced the requirements of the federal health care bill. This indicates that among the surveyed firms, economic uncertainty remains a large issue for Florida’s employers. Yet, the outlook for Florida’s economy appears to be more optimistic when compared to 2012. We should expect survey results to improve in the months ahead.



Sales activity can be used to help assess overall production in the economy, but it is also a useful leading indicator for future employment. As firms see sales activity increase from higher consumer demand, they will be pressed to increase the number of hours their existing employees work in a given week. Once firms are more certain that strong sales are the new normal, they will often require additional employees to handle to increased production and/or sales for end users. The majority of our small business respondents stated that their companies' sales were either unchanged or higher in the first quarter when compared to the same period in 2012. Unfortunately, 28% of firms reported having lower sales. However, it is a positive sign economically that more surveyed firms are observing higher sales than lower sales in the first quarter of 2013.

## Section IV. Labor Market Analysis

Understanding Florida’s labor market is necessary for identifying opportunities and challenges for economic development and workforce operations. In 2012, non-agricultural employment increased by 135,400, helping close the employment gap created during the Great Recession. However, the state’s labor market remains tight, with more unemployed individuals than job openings or Help Wanted Online Ads (HWOLs). Our analysis attempts to determine the supply and demand characteristics of the state’s labor market while identifying the regional differences in labor market tightness.

The ratio of Help Wanted Online Ads and unemployed individuals by region allows us to determine supply and demand characteristics at the state and regional level. While this study is limited to help wanted online ads, the proliferation of help wanted online ads is expected to increase; therefore better serving as a proxy for labor demand. The measurement of the Labor Market Ratio is the number of unemployed individuals per job. A decrease in the number of unemployed individuals or an increase in the number of online ads would lower this ratio, therefore suggesting more employment opportunities.

| RWB          | Unemployed Individuals | Help Wanted Ads | Labor Market Ratio | Unemployment Rate* | Average Quarterly Wage (2012 Q3) |
|--------------|------------------------|-----------------|--------------------|--------------------|----------------------------------|
| 1            | 15,219                 | 4,725           | 3.22               | 7.10%              | \$8,804                          |
| 2            | 6,922                  | 3,878           | 1.78               | 5.40%              | \$9,214                          |
| 3            | 3,286                  | 541             | 6.07               | 6.80%              | \$7,333                          |
| 4            | 7,506                  | 2,875           | 2.61               | 7.70%              | \$8,446                          |
| 5            | 11,612                 | 5,282           | 2.20               | 6.40%              | \$9,576                          |
| 6            | 3,700                  | 572             | 6.47               | 7.50%              | \$7,876                          |
| 7            | 3,466                  | 693             | 5.00               | 7.10%              | \$8,042                          |
| 8            | 51,918                 | 23,293          | 2.23               | 7.10%              | \$10,527                         |
| 9            | 8,271                  | 4,813           | 1.72               | 5.60%              | \$9,620                          |
| 10           | 17,383                 | 5,338           | 3.26               | 8.50%              | \$8,100                          |
| 11           | 22,603                 | 6,075           | 3.72               | 7.90%              | \$8,280                          |
| 12           | 83,892                 | 33,218          | 2.53               | 7.10%              | \$9,898                          |
| 13           | 21,131                 | 6,396           | 3.30               | 8.00%              | \$10,916                         |
| 14           | 32,352                 | 12,287          | 2.63               | 7.30%              | \$10,943                         |
| 15           | 45,486                 | 25,304          | 1.80               | 7.20%              | \$11,213                         |
| 16           | 21,434                 | 4,191           | 5.11               | 8.40%              | \$7,971                          |
| 17           | 22,215                 | 5,826           | 3.81               | 8.30%              | \$9,166                          |
| 18           | 21,862                 | 11,745          | 1.86               | 7.20%              | \$9,318                          |
| 19           | 5,145                  | 904             | 5.69               | 7.60%              | \$7,669                          |
| 20           | 23,956                 | 5,209           | 4.60               | 8.80%              | \$8,861                          |
| 21           | 47,006                 | 19,643          | 2.39               | 7.40%              | \$11,220                         |
| 22           | 62,706                 | 22,364          | 2.80               | 6.20%              | \$10,862                         |
| 23           | 125,971                | 34,481          | 3.65               | 9.30%              | \$11,068                         |
| 24           | 39,032                 | 15,903          | 2.45               | 7.40%              | \$9,459                          |
| <b>State</b> | <b>704,074</b>         | <b>263,240</b>  | <b>2.67</b>        | <b>7.70%</b>       | <b>\$10,391</b>                  |

\*Unemployment rates as of February 2013



According to this analysis, there were 2.7 individuals per online ad in the month of February at the state level; equating to approximately 27 unemployed individuals per 10 online ads. Region 9 (Alachua and Bradford Counties) had the lowest level of labor market tightness, with a labor market ratio of 1.7. Region 6 (Hamilton, Jefferson, Lafayette, Madison, Suwannee and Taylor Counties) had the highest level of labor market tightness, with a labor market ratio of 6.5. Despite having the lowest number of unemployed individuals, region 6 had the lowest number of online ads reported in the month of February, contributing to a significantly higher value. Region 23 (Miami-Dade and Monroe Counties) had the highest number of help wanted online ads and unemployed individuals in the month of February.

Regions 2, 9 and 22 had the lowest unemployment rates amongst all regions in the month of February, with region 2 and 9 experiencing unemployment rates less than 6 percent. Regions 10, 20 and 23 had the highest unemployment rates amongst all regions, with region 23's unemployment rate residing above 9 percent. This disparity in unemployment does suggest that while Florida's labor market has been improving since the depths of the Great Recession, certain regions are lagging behind. In addition, this measure does not include those who are marginally employed or those who have been discouraged from the workforce due to the lack of employment opportunities. Considering region 23's high labor market tightness relative to the state, it is possible that any improvements in the regions employment market may incite more individuals into the labor force, therefore prolonging its recovery.

Regions 21, 23 and 15 had the highest average quarterly wage with workers earning on average more than \$11,000 throughout the third quarter of 2012. Regions 3, 9 and 19 had the lowest average quarterly wage, with workers earning on average, less than \$8,000 in the third quarter of 2012. Differences in wages between regions can be explained by several different factors; two such factors include the industrial organization of the region and the cost of living within the region. The industrial compositions between regions differ, therefore adjusting the demand for labor to individuals with specific skills, training and education levels. A rural county may have less demand for individuals with specialized engineering skills, therefore lowering the quarterly wage. However, this does not suggest that regions with lower quarterly wages are worse off. The costs of living between regions alter, adjusting for differences in labor demand. Therefore, it is important that workforce professionals focus on ensuring regional labor forces have the necessary training and skills to meet regional labor demand.

### **Labor Demand:**

In order to better align regional workforce to the needs of businesses, it is important to know what occupations are in high demand. Based on the Department of Economic Opportunity's

Help Wanted Online Ads summary, the following occupations were identified as being in high demand (3,500+ ads) at the end of February<sup>7</sup>:

- 1. Registered Nurses**
- 2. Retail Salespersons**
- 3. First-line Supervisors of Retail Sales Workers**
- 4. Customer Services Representatives**
- 5. First-Line Supervisors of Food Preparation & Serving Workers**
- 6. First-Line Supervisors of Office & Admin. Support Workers**
- 7. Sales Reps, Wholesale & Manufacturing, Ex. Tech. & Scientific**
- 8. Medical and Health Services Managers**
- 9. Heavy and Tractor-Trailer Truck Drivers**

Throughout the state, the top advertised occupation is that of the registered nurse. In fact, registered nurses are the top demanded occupations in all but four workforce regions. As a result of current labor market trends and projections of employment patterns for Florida's economy, Workforce Florida Inc. can help alleviate the skills-mismatch by focusing on service sector training programs. In particular, retail sales stores; food and restaurant establishments; health care service providers; offices with several clerical positions; technology firms; and transportation industries should be actively targeted for training purposes. Demographic patterns over the next decade should increase demand for skills in health and social assistance services.

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<sup>7</sup> Department of Economic Opportunity.

This report was made possible through a partnership between



# Florida Scorecard Workforce & Economic Indicators Initiative

## 2013: Quarter One

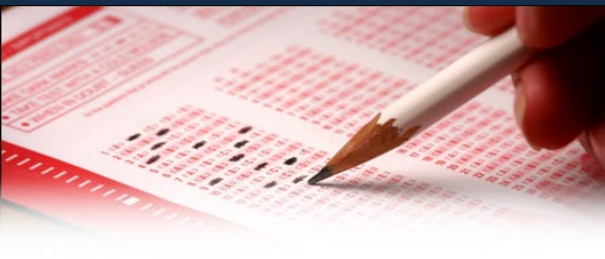


[www.FLFoundation.org](http://www.FLFoundation.org)



# Talent Supply & Education

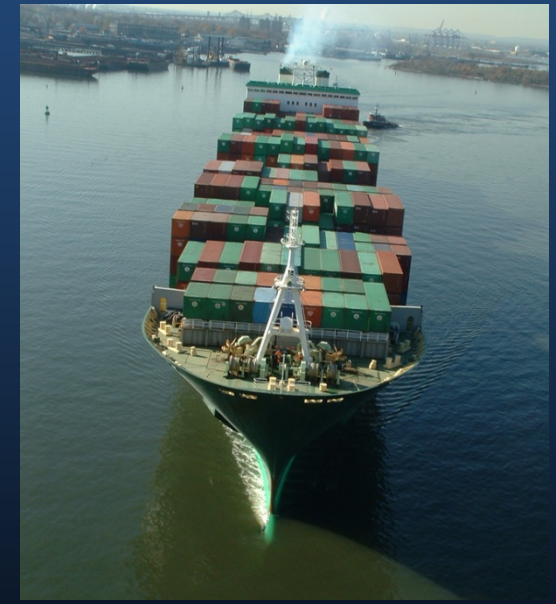
- Florida continues to make performance gains in talent supply and education.
- According to a recent 2011 *Progress in International Reading Literacy Study*, Florida ranks 2<sup>nd</sup> to Hong Kong for its average scaled fourth grade reading score.
- Florida has the most to gain in the middle and high school years. The ranking of Florida's students in all three subjects were lower for eighth graders when compared to their fourth grade counterparts.



[www.FLFoundation.org](http://www.FLFoundation.org)

# Innovation & Economic Development

- With the close of the 2012 year, recent figures show that Florida-origin export growth slowed dramatically in 2012. Export growth registered a dismal 2.3% in 2012 when compared to over 17% in 2011.
- This slowing growth rate in Florida-origin international exports can partially be explained by the large export price inflation we observed in 2011.
- It will be critical to monitor the international trade indicators on the Florida Scorecard during the 2013 year, as export and import activity supports a large segment of Florida's workforce.



# Business Climate & Competitiveness

- Florida's economy expanded at a faster rate during the first three months of 2013 when compared to the previous quarter.
- While the increase in the payroll tax rate went into effect in January 2013—changes in consumer demand seem to be minor in nature.
- While we expect federal sequestration will slow growth in the short-run, the private sector appears to be expanding at a moderate pace.
- While Florida still requires over 500,000 positions to regain the pre-recession peak employment level, the state is making progress toward this goal.



# Overview of Economic and Workforce Indicators

- U.S. real GDP grew at a 2.5% annualized rate in Q1:2013, an increase when compared to the fourth quarter.
- The private-sector economy continues to expand despite cuts to government spending.

## U.S. Real GDP Growth Rates





# Q1: Overview of Economic Indicators

## Economic Indicators 2012: Q4

|                             | Current Quarter | Year Ago    | Over the Year |         | Quarter Ago | Over the Quarter |         | 2012 Q4     |
|-----------------------------|-----------------|-------------|---------------|---------|-------------|------------------|---------|-------------|
|                             | 2012 Q4         | 2011 Q4     | Level         | Percent | 2012 Q3     | Level            | Percent | US Value    |
| Per Capita Personal Income  | \$41,735.34     | \$40,027.25 | \$1,708       | 4.27%   | \$40,818.14 | \$917            | 2.25%   | \$43,369.76 |
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| Unemployment Rate           | 8.0%            | 9.6%        | -1.6          | -       | 8.6         | -0.6             | -       | 7.8%        |

- Source: Bureau of Economic Analysis, [Zillow](#) Real Estate Network
- Footnotes: Personal Income= Total Personal Income/Annual Population  
 Real Gross Domestic Product= in billions, Florida Real GDP is not available by quarter  
 Housing Sales= Total Sales of Homes and Condominiums  
 Employment=Current Employment Statistics

# Q1: Overview of Workforce Indicators

## Workforce Indicators 2013: Q1

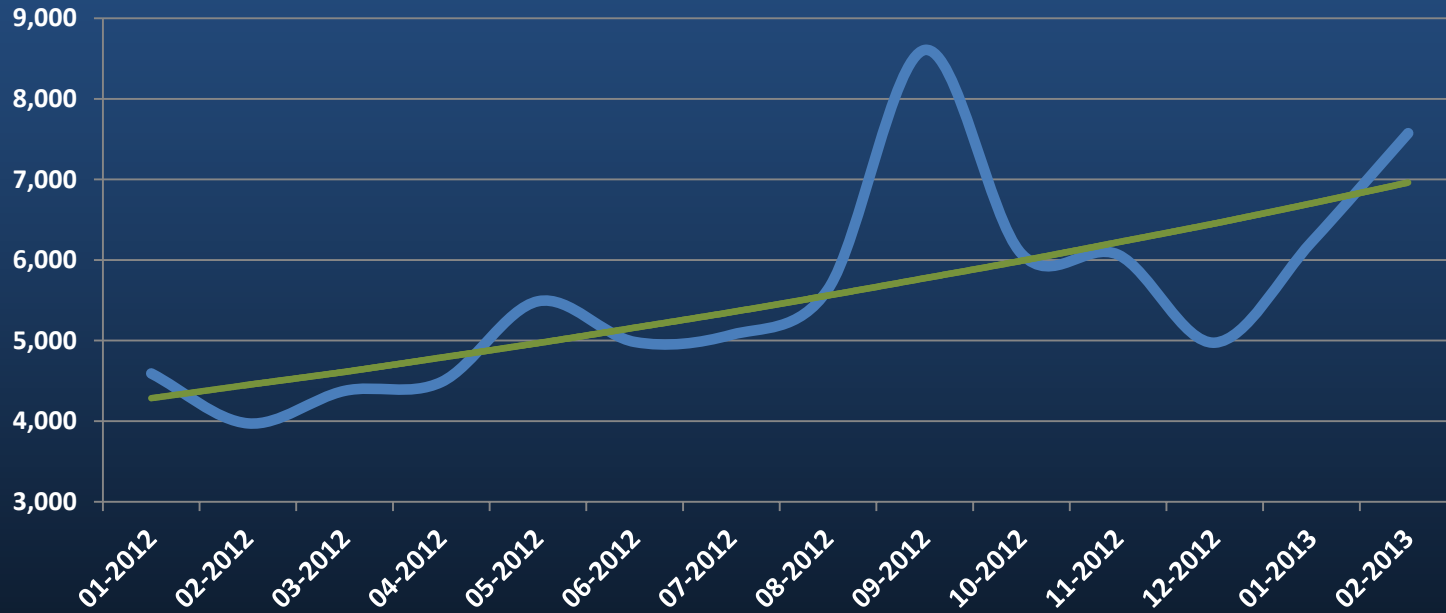
|  | Current Quarter | Year Ago | Over the Year Change |         | Quarter Ago | Over-the-Quarter Change |         |
|--|-----------------|----------|----------------------|---------|-------------|-------------------------|---------|
|  | 2013 Q1         | 2012 Q1  | Level                | Percent | 2012 Q4     | Level                   | Percent |
|  |                 |          |                      |         |             |                         |         |
| Average Number of Reemployment Assistance Claimants per Month                      | 284,057         | 369,390  | -85,333              | -23.10% | 299,883     | -15,826                 | -5.28%  |
| Number of Reemployment Assistance Claimants placed into jobs                       | 30,454          | 20,695   | 9,759                | 47.16%  | 41,671      | -11,217                 | -26.92% |
| Average Number of Job Openings Available per Month                                 | 290,066         | 323,412  | -33,346              | -10.31% | 256,721     | 33,344                  | 12.99%  |
| Number of Individuals Placed in Jobs   | 108,613         | 94,539   | 14,074               | 14.89%  | 138,853     | -30,240                 | -21.78% |
| Average Percentage of Job Openings Filled per Month                                | 12.52%          | 9.76%    | 2.76                 | -       | 18.01%      | -5.49                   | -       |
| Average Percentage of Reemployment Assistance Claimants Placed into Jobs per Month | 3.57%           | 1.87%    | 1.70                 | -       | 4.62%       | -1.05                   | -       |

Source: Department of Economic Opportunity, Monthly Placement Reports

# Private Building Permits

New building permits continue to increase, indicating stronger future economic activity

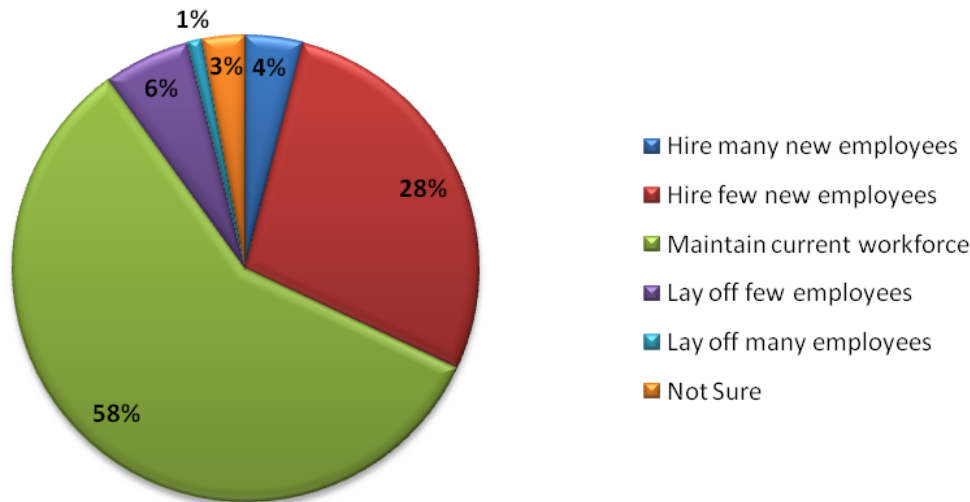
### Florida New Building Permits



# Slight Improvement in Hiring Plans

While 58% of firms surveyed plan to maintain their current workforce; 28% plan to hire few new employees; and 4% plan to hire many new employees.

Employment Plans During the Next Six Months



# Regional Labor Market Analysis

The ratio of Help Wanted Online Ads and unemployed individuals by region allows us to determine supply and demand characteristics at the state and regional level. While this study is limited to help wanted online ads, the proliferation of help wanted online ads is expected to increase; therefore better serving as a proxy for labor demand.



| RWB          | Unemployed Individuals | Help Wanted Ads | Labor Market Ratio | Unemployment Rate* | Average Quarterly Wage (2012 Q3) |
|--------------|------------------------|-----------------|--------------------|--------------------|----------------------------------|
| 1            | 15,219                 | 4,725           | 3.22               | 7.10%              | \$8,804                          |
| 2            | 6,922                  | 3,878           | 1.78               | 5.40%              | \$9,214                          |
| 3            | 3,286                  | 541             | 6.07               | 6.80%              | \$7,333                          |
| 4            | 7,506                  | 2,875           | 2.61               | 7.70%              | \$8,446                          |
| 5            | 11,612                 | 5,282           | 2.20               | 6.40%              | \$9,576                          |
| 6            | 3,700                  | 572             | 6.47               | 7.50%              | \$7,876                          |
| 7            | 3,466                  | 693             | 5.00               | 7.10%              | \$8,042                          |
| 8            | 51,918                 | 23,293          | 2.23               | 7.10%              | \$10,527                         |
| 9            | 8,271                  | 4,813           | 1.72               | 5.60%              | \$9,620                          |
| 10           | 17,383                 | 5,338           | 3.26               | 8.50%              | \$8,100                          |
| 11           | 22,603                 | 6,075           | 3.72               | 7.90%              | \$8,280                          |
| 12           | 83,892                 | 33,218          | 2.53               | 7.10%              | \$9,898                          |
| 13           | 21,131                 | 6,396           | 3.30               | 8.00%              | \$10,916                         |
| 14           | 32,352                 | 12,287          | 2.63               | 7.30%              | \$10,943                         |
| 15           | 45,486                 | 25,304          | 1.80               | 7.20%              | \$11,213                         |
| 16           | 21,434                 | 4,191           | 5.11               | 8.40%              | \$7,971                          |
| 17           | 22,215                 | 5,826           | 3.81               | 8.30%              | \$9,166                          |
| 18           | 21,862                 | 11,745          | 1.86               | 7.20%              | \$9,318                          |
| 19           | 5,145                  | 904             | 5.69               | 7.60%              | \$7,669                          |
| 20           | 23,956                 | 5,209           | 4.60               | 8.80%              | \$8,861                          |
| 21           | 47,006                 | 19,643          | 2.39               | 7.40%              | \$11,220                         |
| 22           | 62,706                 | 22,364          | 2.80               | 6.20%              | \$10,862                         |
| 23           | 125,971                | 34,481          | 3.65               | 9.30%              | \$11,068                         |
| 24           | 39,032                 | 15,903          | 2.45               | 7.40%              | \$9,459                          |
| <b>State</b> | <b>704,074</b>         | <b>263,240</b>  | <b>2.67</b>        | <b>7.70%</b>       | <b>\$10,391</b>                  |

# The Florida Scorecard Workforce & Economic Indicators Initiative

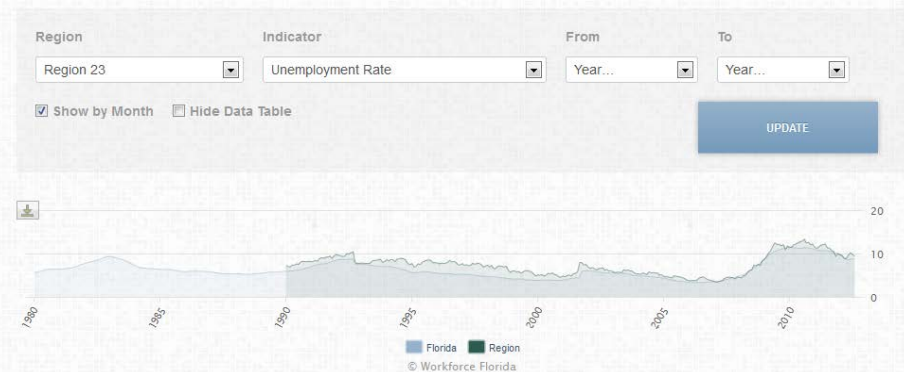
The Workforce & Economic Indicators Initiative provides data-driven measurement and evaluation of Florida's workforce and economic development systems.

## REGION 23 MIAMI-DADE & MONROE



## THE FLORIDA SCORECARD WORKFORCE & ECONOMIC INDICATORS

### UNEMPLOYMENT RATE DATA



# Phase II: Workforce & Economic Development

- The website database is being updated to incorporate key common measures for all RWBs on a quarterly basis.
- The Scorecard will still provide education and economic indicators.

- Data Description Guide
- User Orientation Guide/Development

GET STARTED  
**SELECT A REGION**  
CLICK THE MAP TO BEGIN EVALUATING THE DATA

OR, START HERE  
Choose an Indicator

**QUICK FACT**  
New business formation and entrepreneurship are important drivers for future employment. In 2011 the Kauffman Foundation ranked Florida's rate of entrepreneurial activity as one of the highest in the nation.  
Kauffman Foundation

**PERFORMANCE INDEX**

**THE FLORIDA SCORECARD**



## **Florida Workforce Integrated Performance Reporting System (FWIPRS) April 1, 2013 Launch!**

As an initiative of the Workforce Florida Performance Council, the DEO Performance Team, along with Resource Team members representing local Regional Workforce Boards developed and deployed the Florida Workforce Integrated Performance Reporting System (FWIPRS). The May 9<sup>th</sup> Performance Council Webinar will include a presentation of key functionalities of the System by DEO Performance Team members and impact statements by Regional Workforce Board Executive Director Richard Williams.

This robust statewide system will be invaluable to partners by providing tools to front-line workers for managing customer service as well as to regional senior management and executive directors for resource and strategic planning. Data previously available with special add-on software is now available through state-level resources resulting in greater efficiencies and user-friendly navigation. This tool will be accessible to Workforce Florida Board of Directors for on-demand information and to the Performance Council for workforce analytics and decisions.

This innovative new tool provides data through simple selections and clicks in a standard web browser in addition to producing helpful visual analytics for some key metrics and elements. Information and analytics provided by this web-based application is powered by data from myriad employment and training related systems and programs including, but not limited to:

- Wagner Peyser (WP)
- Re-employment Assistance (REA)
- Reemployment Assistance (RA – Formerly Unemployment Compensation)
- Workforce Investment Act (WIA)
- Welfare Transition (WT)
- Food Stamp Employment and Training (FSET)
- Trade Adjustment Assistance (TAA)

The initial phase of the program is implemented through a specified number of users (allocated among Regional Workforce Boards) while the systems' capacity and performance is evaluated and necessary adjustments made. It is anticipated that the system will be available to most other users in the coming months as new hardware and software upgrades are implemented. More information for accessing, using and evaluating the new system will be made available in the coming days as well as plans for training and local deployment.

Subsequent phases for development are also in the planning stage and will include, additional functionality, expansion and enhancement of metrics and reports based on user feedback and surveys of economic and workforce system partners. Many thanks to the entire FWIPRS development team led by Telly Buckles, the support of Lois Scott and James Finch, as well as enormous appreciation to the Regional Workforce Board subject matter experts, executive directors and the DEO management and information technology teams. The deployment of the Florida Workforce Integrated Reporting System would not have been possible without the seamless collaboration, hard work and dedication that all of these partners exemplified.





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## Common Measures Overview



# Common Measures

- **United States Department of Labor (USDOL) mandated report, used as an assessment tool for state workforce systems**
- **Implemented Program Year (PY) 2005, through Training and Employment Guidance Letter (TEGL) 28-04, in order to streamline performance reporting**
- **Common Measures consists of 3 Adult Measures, 3 Dislocated Worker Measures, 3 Youth Measures and 3 Wagner-Peyser Measures**



**2012 - 2013 FLORIDA WORKFORCE COMMON MEASURES - STATEWIDE PERFORMANCE**  
**July 1, 2012 - March 31, 2013 Outcomes**

| Common Measures                         | Performance 2009-2010 | Performance 2010-2011 | Performance 2011-2012 | Performance 2012 -2013 1st Quarter | Performance 2012 -2013 2nd Quarter | Performance 2012 -2013 3rd Quarter | State Goal 2012-2013 |
|---|-----------------------|-----------------------|-----------------------|------------------------------------|------------------------------------|------------------------------------|----------------------|
| <b>Adults:</b>                          |                       |                       |                       |                                    |                                    |                                    |                      |
| 1 Entered Employment Rate               | 82.90%                | 79.90%                | 74.20%                | 73.30%                             | 73.10%                             | 77.70%                             | 82.00%               |
| 2 Employment Retention Rate             | 90.70%                | 92.40%                | 91.80%                | 90.90%                             | 91.20%                             | 91.10%                             | 92.00%               |
| 3 Average 6-Months Earnings             | \$21,064.20           | \$22,671.20           | \$20,479.20           | \$20,088.30                        | \$19,883.30                        | \$19,727.00                        | \$22,755             |
| <b>Dislocated Workers:</b>              |                       |                       |                       |                                    |                                    |                                    |                      |
| 4 Entered Employment Rate               | 79.70%                | 84.50%                | 84.20%                | 84.30%                             | 84.60%                             | 86.10%                             | 93.00%               |
| 5 Employment Retention Rate             | 87.40%                | 89.00%                | 90.00%                | 90.40%                             | 90.90%                             | 91.20%                             | 90.00%               |
| 6 Average 6-Months Earnings             | \$16,715.40           | \$17,292.50           | \$16,835.70           | \$16,552.80                        | \$16,302.80                        | \$16,109.30                        | \$18,706             |
| <b>Youth Common Measures:</b>           |                       |                       |                       |                                    |                                    |                                    |                      |
| 7 Placement in Employment or Education  | 52.70%                | 49.30%                | 47.70%                | 52.90%                             | 53.50%                             | 56.70%                             | 53.00%               |
| 8 Attainment of a Degree or Certificate | 58.90%                | 61.50%                | 69.80%                | 75.40%                             | 74.50%                             | 72.30%                             | 70.00%               |
| 9 Literacy and Numeracy Gains           | 41.10%                | 37.70%                | 45.30%                | 48.50%                             | 49.80%                             | 50.20%                             | 51.00%               |
| <b>Wagner-Peyser:</b>                   |                       |                       |                       |                                    |                                    |                                    |                      |
| 10 Entered Employment Rate              | 46.00%                | 50.00%                | 55.00%                | 57%                                | 58%                                | Not Available                      | 61.00%               |
| 11 Employment Retention Rate            | 76.00%                | 79.00%                | 80.00%                | 81%                                | 81%                                | Not Available                      | 89.00%               |
| 12 Average 6-Months Earnings            | \$12,275.00           | \$12,948.00           | \$12,874.00           | \$12,902                           | \$12,996                           | Not Available                      | \$14,283.00          |

|  |
|--|
| Not Met (less than 80% of negotiated)      |
| Met (80-100% of negotiated)                |
| Exceeded (greater than 100% of negotiated) |



# For More Information

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FLORIDA DEPARTMENT *of* ECONOMIC OPPORTUNITY



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# Strategic Training Coordination Unit



# Strategic Training Coordination Unit

- What is the Strategic Training Coordination Unit?
  - Created to coordinate training to the Regional Workforce Boards (RWBs) to ensure that training needs are met comprehensively throughout the year using both onsite training and innovative methods via technology



# Background

## January 2012

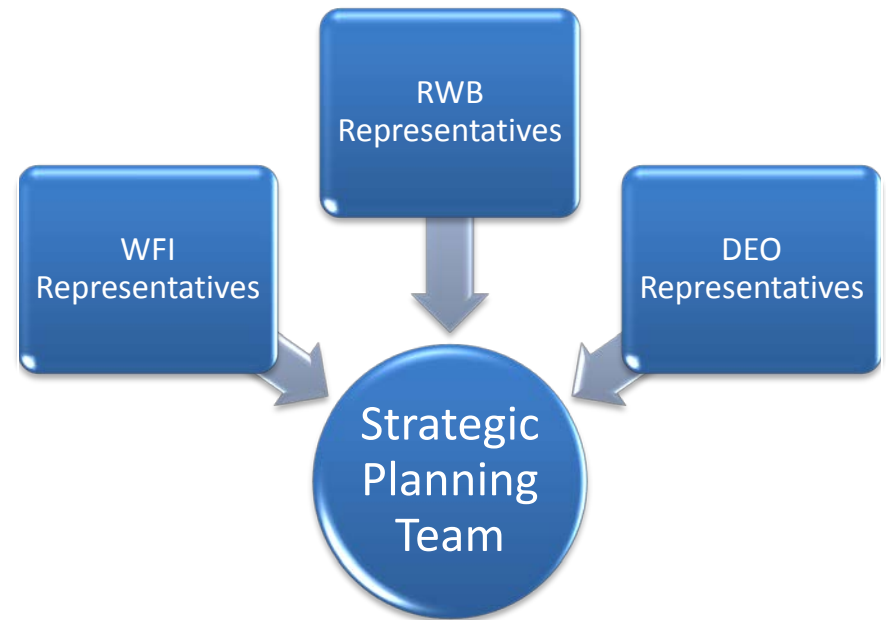
- Tier One implementation process is to be re-evaluated.
  - Process was previously implemented through Dynamic Works.
  - New process must:
    - be cost effective,
    - remain updated over time, and
    - be expandable.



# Background

February 2012

- The Strategic Planning Team was created to:
  - identify a plan for implementing a Tier One training program, and
  - evaluate the various training options.





# Background

- The Strategic Planning Team decided to have DEO create and deliver Tier One training online through the Adobe Connect learning management system.
  - DEO established the Strategic Training Coordination Unit to create the Tier One training materials and further coordinate training for the Regional Workforce Boards.



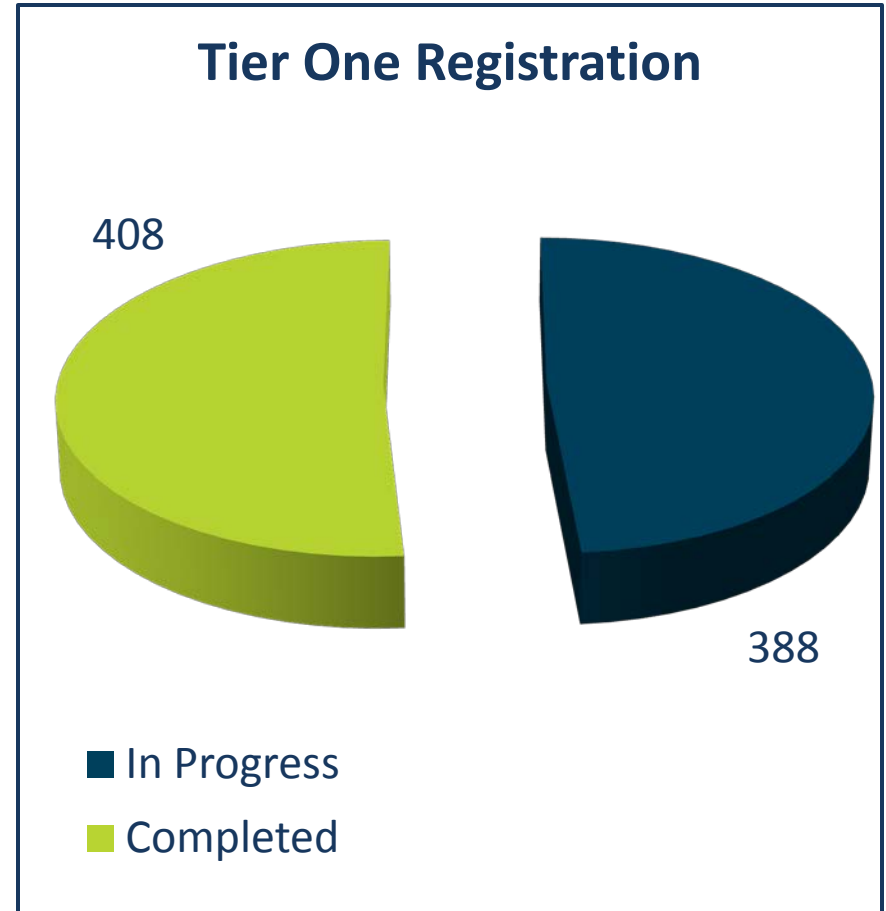
# Tier One

- The Tier One Curriculum consists of nineteen courses broken into seven main topics decided on by the Strategic Planning Team.
  - History & Structure of the Workforce Development System
  - Customer Service
  - Career Plan Development
  - Job Search Skills
  - Job Keeping Skills
  - Employ Florida Marketplace
  - Labor Market Information



# Tier One

- Since July 2012, a total of 796 staff members have been assigned to complete the Tier One Curriculum.
- Of those 796 staff members, 408 have completed the training.



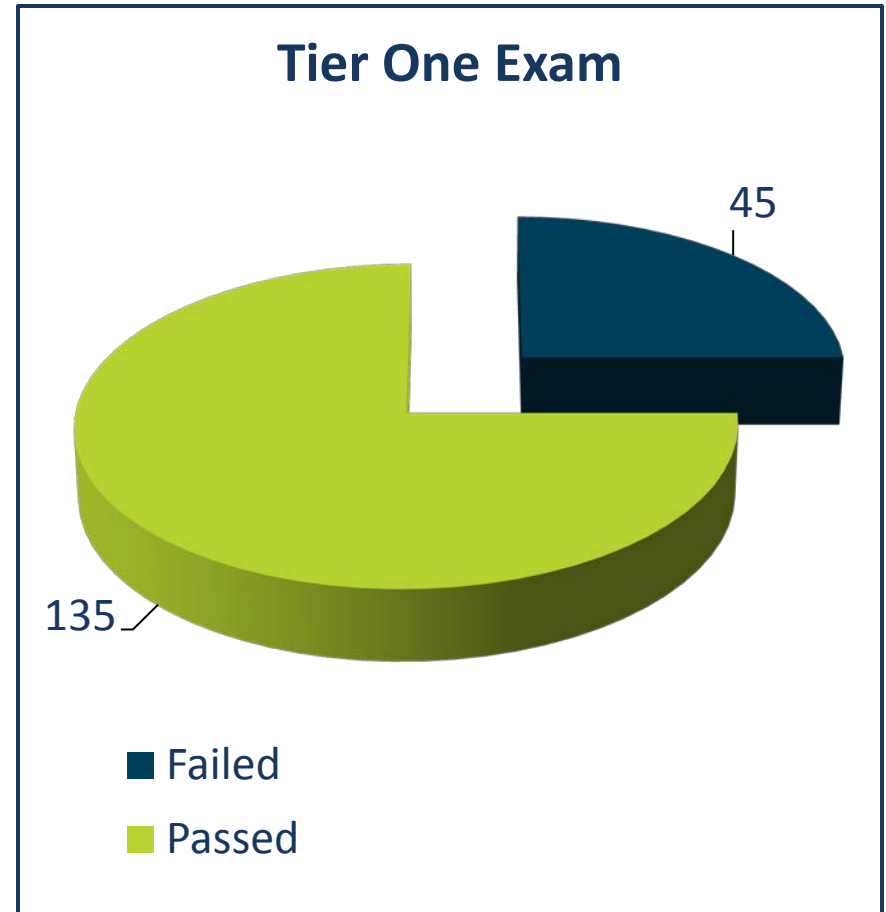
# Tier One Exam

- A draft Tier One Certificate Exam was launched in November 2012.
  - Over 50 staff members completed the exam for data collection purposes.
  - The exam results were analyzed for validity and reliability, and adjustments were made accordingly.
- The official Tier One Certificate Exam was launched on February 4, 2013.



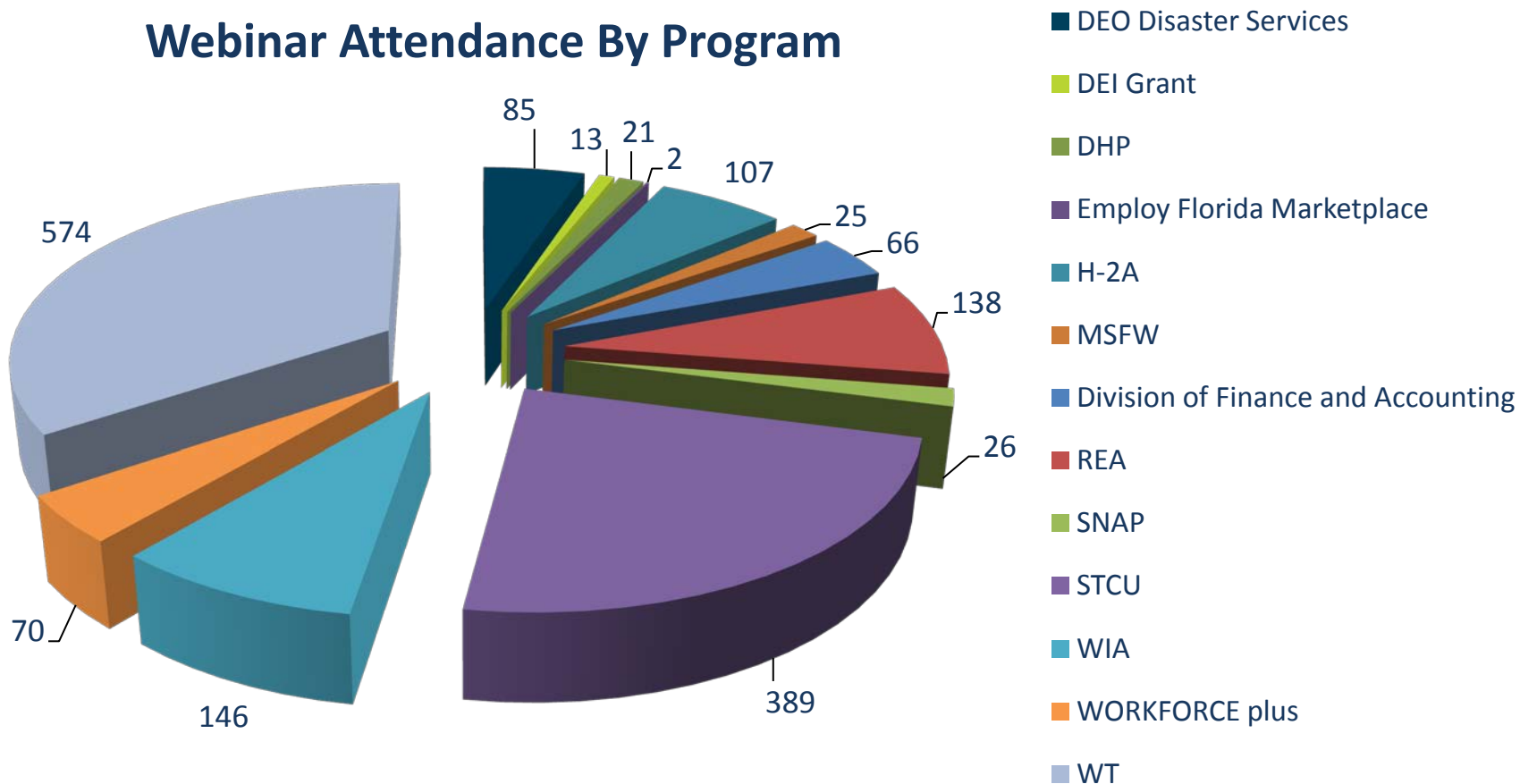
# Tier One Exam

- Including the draft version, 180 staff members have taken the Tier One Certificate Exam.
- Of those 180 staff members, 135 have passed the Exam.



# Training

## Webinar Attendance By Program



# Training

## On-site Training

- Twenty-nine (29) on-site training sessions were conducted by or organized by DEO during the program year.
- Over 900 certificates of attendance have been distributed statewide to the RWBs, equaling over 11,000 external Continuing Education Unit (CEU) hours.



# Training

- Training materials were posted on the [Training Materials](#) page of DEO's website to be used as resources by the RWBs, including:
  - four PowerPoint presentations under the “Traditional Trainings” tab,
  - two narrated training modules under the “Narrated Trainings” tab, and
  - eighteen of the nineteen Tier One courses under the “Adobe Connect” tab.





# Strategic Training Coordination Unit

- What is on the horizon for the unit?
  - Creating modules based on programmatic areas of expertise, Tier Two
  - Entering all Regional Workforce Board staff into Adobe Connect
  - Creating modules based on the National Association of Workforce Development Professional's ten areas of credentialing expertise, Tier Three
  - Adding "Region's Best Practices" to training so that all RWBs can benefit from those and improve service delivery





# WORKFORCE FLORIDA BOARD *of* DIRECTORS

## 2012-2013 Executive Committee & Board Councils

### Executive Committee

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|                                      |               |             |
|--------------------------------------|---------------|-------------|
| <b>Dwayne Ingram, Chairman</b>       | Kevin Doyle   | Andy Perez  |
| <b>Jennifer Grove, Vice Chairman</b> | Leslie Ingram | Ric Shriver |
| Mary Lou Brunell                     | Lumon May     | Britt Sikes |

### Finance & Efficiency Council

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|                                 |                 |   |
|---------------------------------|-----------------|---|
| <b>Andy Perez, Chairman</b>     | George Hauer    | *Dennis Meyers (Tampa Bay WorkForce Alliance) /Angie Metcalf (Chair, Workforce Solutions) |
| <b>Lumon May, Vice Chairman</b> | Eric Kennedy    |   |
| James Baiardi                   | Alex Moseley    |   |
| Randy Berridge                  | Maria Rodriguez |   |
| Ben Grzesik                     | Wayne Rosen     |   |

### Global Talent Competitiveness Council

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|   |  |   |
|---|--|---|
| <b>Ric Shriver, Chairman</b>                | Mary Lou Brunell                           | * John Wanamaker (Chairman, Center for Business Excellence /Patti Breedlove (Chair, FloridaWorks) |
| <b>Leslie Ingram, Vice Chairman</b>         | Ed Moore                                   |   |
| David Armstrong                             | Linda Sparks                               |   |
| Commissioner Tony Bennett/<br>Rod Duckworth | Al Stimac                                  |   |
| Brittany Birken                             | Secretary Wansley Walters/<br>Christy Daly |   |

### Performance Council

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|                                   |  |  |
|-----------------------------------|--|--|
| <b>Britt Sikes, Chairman</b>      | Bill Law                                 | * Steve Parrish (Chairman, Workforce Alliance)/ Gary Arenson (Chairman, WorkForce One) |
| <b>Kevin Doyle, Vice Chairman</b> | Linda Reiter                             |  |
| Dan Baldwin                       | Steven Sonenreich                        |  |
| Matthew Falconer                  | Secretary David Wilkins/<br>Mike Carroll |  |
| Don Gugliuzza                     |  |  |

*\*Regional Workforce Board Representative and designee*

**WORKFORCE FLORIDA BOARD OF DIRECTORS**  
**DRAFT 2013 SCHEDULE**  
**OF BOARD, EXECUTIVE COMMITTEE & COUNCIL MEETINGS**  
*(Subject to Change)(All times ET)*

**MAY 2013**

|  |              |              |
|--|--------------|--------------|
| Finance & Efficiency Council<br><i>Tampa</i> | May 21, 2013 | 1:15 – 3:45  |
| Executive Committee Meeting<br><i>Tampa</i>  | May 21, 2013 | 4:00 – 5:30  |
| Board of Directors Meeting<br><i>Tampa</i>   | May 22, 2013 | 8:30 – 12:30 |

**JULY 2013**

|                                    |               |               |
|------------------------------------|---------------|---------------|
| Executive Committee Teleconference | July 17, 2013 | 10:00 – 11:00 |
|------------------------------------|---------------|---------------|

**AUGUST 2013**

|  |                 |             |
|--|-----------------|-------------|
| Councils/Executive Committee Meeting<br><i>Palm Beach County</i> | August 28, 2013 | 9:00 – 5:00 |
| Councils/Board of Directors<br><i>Palm Beach County</i>          | August 29, 2013 | 8:00 – 5:00 |

**OCTOBER 2013**

|                                    |                  |               |
|------------------------------------|------------------|---------------|
| Executive Committee Teleconference | October 16, 2013 | 10:00 – 11:00 |
|------------------------------------|------------------|---------------|

**NOVEMBER 2013**

|  |                  |             |
|--|------------------|-------------|
| Councils/Executive Committee Meeting<br><i>Daytona Beach</i> | November 6, 2013 | 9:00 – 5:00 |
| Councils/Board of Directors<br><i>Daytona Beach</i>          | November 7, 2013 | 8:00 – 5:00 |