Board of Directors Executive Committee Meeting Agenda
APRIL 4, 2017 • 10 A.M. – 2 P.M. ET

HYATT REGENCY ORLANDO INTERNATIONAL AIRPORT
9300 JEFF FUQUA BOULEVARD
ORLANDO, FL 32827
MEETING ROOM: MIRABEL

Chairman’s Welcome & Remarks

Consent Agenda

1. Approval of Aug. 3, 2016 Executive Committee Meeting Minutes
2. Approval of Jan. 12, 2017 Executive Committee Meeting Minutes
3. Individual Training Accounts Waiver – CareerSource Capital Region

Action Item

1. Approval of CareerSource Florida Treasurer

Legislative Update

Michelle Dennard

Goals

Michelle Dennard

Strategic Initiatives Progress
Michelle Dennard/Professional Team

Lunch Break

2017-2018 Priorities Discussion

Open Discussion/Public Comment

Chairman’s Closing Remarks

Britt Sikes

UPCOMING MEETINGS
Board of Directors & Related Meetings
May 16-17, 2017 • St. Petersburg

Board of Directors & Related Meetings
August 8-9, 2017 • Teleconferences

Workforce Professional Development Summit
Board of Directors & Related Meetings
Oct. 23-26, 2017 • Orlando
Consent Item 1

APPROVAL OF MINUTES

In accordance with Article VII, Section 7.3, of the approved bylaws, the corporation is required to keep correct and complete books and records of account and shall keep minutes on the proceedings of the board of directors.

NEEDED ACTION

Approve the draft minutes of the Aug. 3, 2016 meeting of the CareerSource Florida Executive Committee to include any modifications or changes noted by the committee.
CALL TO ORDER

Chairman Britt Sikes called the webinar meeting of the CareerSource Florida Executive Committee to order at approximately 10 a.m. ET on Aug. 3, 2016 by welcoming all to the teleconference. He also welcomed members of the FWDA and FWCA and DEO. He then asked for roll to be called.

ROLL CALL

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

- Chairman Britt Sikes
- Bob Campbell
- Steve Capehart
- Tim Center
- Rose Conry
- Duane De Freese
- Kevin Doyle
- Arnie Girnun
- Elli Hurst
- Mike Tomas
- Ardian Zika

Brittany Birken and Ed Moore were unable to attend.

CHAIRMAN’S WELCOME & REMARKS

Chairman Britt Sikes began the meeting by announcing the composition of the executive committee members as board members taking on leadership roles of councils have been added to the executive committee.

The CareerSource Florida Executive Committee consists of:

- Chairman Britt Sikes
- Brittany Birken
- Steve Capehart
- Bob Campbell
- Tim Center
- Rose Conry
- Duane De Freese
- Kevin Doyle
Chairman Sikes thanked the all board members for their service on the executive committee. Mr. Sikes explained among other duties, the committee is responsible for determining strategic priorities, providing board level guidance and advice and monitoring progress and continued relevancy of strategic priorities. He also announced the new chairs of the councils and thanked them for their willingness to serve in these roles. They are:

**Strategic Policy Council**
Chairman Kevin Doyle
Vice Chairman Brittany Birken

**Finance Council**
Chairman Arnie Girnun
Vice Chairman Bob Campbell

Chairman Sikes then thanked the board sponsors:

**Platinum Sponsors**
- Dex Imaging
- Florida Chamber Foundation
- Gulf Power Company

**Gold Sponsor**
- Coldwell Banker Commercial AI Group

**Silver Sponsor**
- Florida Vocational Institute
- Independent Colleges & Universities of Florida
- New Horizons Computer Learning Centers of South Florida
- StaffTime
- U.S. Stem Cell, Inc.
- Wexford Strategies

Chairman Sikes recapped the subjects covered at the last full board meeting in November in which the board heard from several local workforce development board leaders on collaboration efforts (see Nov. 10, 2016 board minutes [here](#)).
CONSENT ITEM

Chairman Sikes explained the Consent Item: Approval of the April 6-7, 2016 CareerSource Florida Executive Committee meeting minutes.

Chairman Sikes asked for a motion to approve the Consent Item as presented.

Motion: Elli Hurst

Second: Steve Capehardt

Chairman Sikes opened the floor for discussion and corrections. Hearing none, Chairman Sikes opened the floor for public comment. Hearing none, he called for a vote. The motion passed. None were opposed. President Hart will sign and annotate the meeting minutes for the official record.

PRESIDENT’S REPORT

Chairman Sikes invited CareerSource Florida President and CEO Chris Hart IV to present his report. President Hart began his report by providing the latest Expanding Business Engagement figures to the committee and walked them through the meanings of each. He noted the 80,728 Businesses Served Statewide, which represents 19% of all businesses in the state of Florida. The 191,842 High-Value Services Provided to Businesses indicates that each one of those 80,000 businesses on average received just over two services. He explained some details about the various grant programs and the meaning of the numbers.

President Hart provided CareerSource Florida Highlights for FY 2015-2016:

- Earned more than $100,000 in professional services contracts;
- Launched inaugural CareerSource Florida Network Cooperative Outreach Program;
- Launched new CareerSource Florida website;
- Launched new CareerSource Florida intranet site;
- Hosted 54 meetings with members of the Florida Legislature;
- Secured $12 million for the Quick Response Training grant program and additional $100,000 to market FloridaFlex;
- Led Florida’s WIOA Task Force, consisting of 20 stakeholders;
- Launched quarterly CareerSource Florida Partners Council meetings;
- Launched new leadership blog, From the Source;
- Maintained CareerSource Florida’s perfect record in financial audits and federal performance monitoring;
- Completed an Internal Revenue Service audit of the CareerSource Florida 401(k) pension plan with no material findings;
- Supported an OPPAGA Intensive Three-Year Review of Training Grant Programs;
- Competitively secured $7 million USDOL Sector Partnership National Emergency Grant;
- Conducted 122 local visits by CareerSource Florida professional team members;

President Hart presented the details and outcomes of the Cooperative Outreach Program. The program aided the local workforce development boards in 71 website optimizations, 28 banner ads and 15 landing pages as well as eight email campaigns. Four local boards received customized social media training.

Draft Executive Committee Aug. 3, 2016 Meeting Minutes
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These efforts resulted in the following outcomes: 9.5 million digital impressions, 2,060 job seeker leads through 12 campaigns, 52 employer leads through 3 campaigns. The Cooperative Outreach Program also provided 14,500 total printed products delivered and 33 outreach tools designed. Those produced outcomes of 17.6 million impressions through the transportation campaign as well as 1.7 million impressions through the billboard campaign. President Hart said the programs have been tremendously successful.

President Hart paused and asked if anyone had any comments or questions at this point. After some comments thanking President Hart for his work, he continued.

President Hart reminded the executive committee members of the CareerSource Florida aspirational goal.

**The Goal**

Increase the prosperity of workers and employers; reduce welfare dependency; increase economic self-sufficiency; meet employer needs; and enhance productivity and competitiveness.

President Hart then outlined the corporate goals for FY 2016-17:

1. Position Florida across the southeast region, and then nationally, as the top state for delivering talent solutions to meet the needs of business;

2. Enhance the ability of existing, emerging and evolving businesses to attract, develop and keep talent by improving CareerSource Florida’s products, services and talent delivery model; and

3. Facilitate data-informed dialogue, decision-making, policy development and investment by the CareerSource Florida Board of Directors.

President Hart explained the reasoning for each corporate goal. He then concluded his report. Chairman Sikes thanked President Hart for his report and congratulated him on the successes of the year.

**OPEN DISCUSSION/ PUBLIC COMMENT**

Chairman Sikes asked if there were any comments or question from the public. No comments were made. Chairman Sikes opened it to discussion by the executive committee members. Hearing none, he moved to his closing remarks.

**CLOSING REMARKS**

Chairman Sikes thanked the executive committee members for their time and participation in the meeting. He also thanked President Hart and the CareerSource Florida team for all the work completed in FY2015-16. He said he is excited about The Goal as well as the corporate goals. He highlighted the upcoming meetings for the remainder of 2016.

**UPCOMING MEETINGS**

- Workforce Professional Development Summit/Board of Directors & Related Meetings/Future of Florida Forum — September 27-29, 2016 — Orlando
• Strategic Policy & Finance Council Teleconferences — November 9, 2016 — TBD
• Board of Directors Webinar — November 10, 2016 — 9 a.m. 12:30 p.m.

The meeting adjourned at 11:28 a.m. ET.
Consent Item 2

APPROVAL OF MINUTES

In accordance with Article VII, Section 7.3, of the approved bylaws, the corporation is required to keep correct and complete books and records of account and shall keep minutes on the proceedings of the board of directors.

NEEDED ACTION

Approve the draft minutes of the January 12, 2017 meeting of the CareerSource Florida Executive Committee to include any modifications or changes noted by the committee.
CALL TO ORDER

Chairman Britt Sikes called the teleconference meeting of the CareerSource Florida Executive Committee to order at approximately 10 a.m. ET on Jan. 12, 2017 by welcoming all to the teleconference. He then asked for roll to be called.

ROLL CALL/QUORUM

A quorum was present with the following executive committee members in attendance:

Chairman Britt Sikes                        Rose Conry
Brittany Birken                               Kevin Doyle
Bob Campbell                                  Ed Moore
Steve Capehart                                Ardian Zika
Tim Center

Elli Hurst, Duane De Freese and Mike Tomas were unable to attend.

CHAIRMAN'S WELCOME & REMARKS

Chairman Britt Sikes welcomed the executive committee members as well as the Florida Workforce Development Association, members of the Workforce Chairs' Alliance and our state partners at the Department of Economic Opportunity who may be on the call.

Chairman Sikes announced the addition of three new board members: James Nolan, Training Director for the Electrical Training Alliance of Jacksonville; Mike Myhre, CEO of the Florida Small Business Development Center Network; and Stan Connally, Chairman, President and CEO of Gulf Power Company. He asked the executive committee members to introduce themselves to the new members.

Chairman Sikes then thanked the board sponsors:

Platinum Sponsors

- Dex Imaging
- Florida Chamber Foundation
- Gulf Power Company

Gold Sponsor

- Coldwell Banker Commercial AI Group
Chairman Sikes recapped the subjects covered at the last board of director’s meeting during the November webinar in which the board heard from several Local Workforce Development Board leaders on efforts of collaboration to enhance business competitiveness. Mr. Sikes noted that the board is looking forward to additional dialogue on the subject at next month’s board meeting (see Nov. 10, 2016 board minutes here).

Chairman Sikes then discussed the departure of CareerSource Florida President and CEO Chris Hart. He informed the executive committee that the search for a new President and CEO is underway. A progress update will be provided later in the agenda from President and CEO Search Committee Chairman Kevin Doyle.

Chairman Sikes outlined the events of the upcoming Day at the Capitol and meetings in February in Tallahassee. He stressed the importance of full participation at the Day at the Capitol and board and related meetings. He then turned to the next agenda item.

CAREERSOURCE FLORIDA UNIT UPDATES

Chairman Sikes introduced CareerSource Florida Vice President of Policy Michelle Dennard to provide an update on the Policy unit. Ms. Dennard informed the executive committee that the work on the Talent and Prosperity Dashboard continues. The dashboard has been updated pursuant to feedback from the executive committee and the Strategic Policy Council. She welcomed feedback and advised that a newly revised dashboard will be presented at the February Strategic Policy Council meeting with a request for additional feedback. She explained that the dashboard is a living, breathing document.

Ms. Dennard informed the executive committee that the policy unit is moving forward with the review of the strategic policies as required by the board every two years. Policy updates and changes will be presented to the Strategic Policy Council and the full board at the meetings in February. The work on the implementation of the Workforce Innovation and Opportunity Act is also progressing. CareerSource Florida staff members continue to meet regularly with education core partners.

Ms. Dennard informed the committee that CareerSource Florida is on track to make the first awards on the Performance Funding Model. The analytics team is finalizing their findings and expect to inform the local boards of their standing by the end of January. The awards will be made formal at the February Strategic Policy Council meeting. She concluded her report and asked if there were any questions.

Chairman Sikes thanked Ms. Dennard and asked if there were any questions. Hearing none, he introduced CareerSource Florida Senior Vice President of Business and Workforce Development Andra Cornelius for her report.
Ms. Cornelius began by reminding the executive committee of the corporate goals. The Business and Workforce Development unit is focused squarely on corporate goal two: To enhance the ability of existing, emerging and evolving businesses to attract, develop and keep talent by improving products and services and the talent delivery model. That delves down into sector strategy solutions. The heart of this approach is to work across organizational lines with workforce, economic development, education and other core partners to help companies of all sizes address their talent needs. Ms. Cornelius said the goal is to build the talent pipeline which goes beyond placing people into jobs and builds meaningful career pathways for a range of workers in specific industry sectors.

Ms. Cornelius outlined the team’s plan and informed the committee of the upcoming Sector Strategies Technical Assistance workshops her team is conducting around the state. The first workshop was in December in Panama City. CareerSource Gulf Coast and Gulf Coast State College hosted this event. Ms. Cornelius said there was great attendance and a special breakout session was held to focus on rural employment.

Upcoming workshops are:
- Feb. 22 — South Florida – Lake Worth;
- March 7 — Central Florida – Tampa; and
- April 18 — Northeast Florida – Ocala

In addition, the team holds quarterly webinars to work with business leaders and continues to routinely work with local board leaders to ensure those agendas meet their needs.

Lastly, Ms. Cornelius updated the board on the nearly $7 million Sector Strategy National Emergency Grant that CareerSource Florida received through a competitive process. The participating local boards are at 68% of our training goal. Ms. Cornelius commended the local workforce development boards and Department of Economic Opportunity, as Florida continues to lead in this area. Ms. Cornelius concluded her report.

Chairman Sikes thanked Ms. Cornelius and asked if there were any questions. Hearing none, he introduced CareerSource Florida Vice President of External Affairs Adriane Glenn Grant for her report.

Ms. Glenn Grant began by reminding the committee of the pillars: collaborate, innovate and lead. These are the drivers used to strategize and execute priorities as a board, professional team and a network. She highlighted recent and upcoming collaborative events including the first partners’ council meeting of this year held this month in Tallahassee. Nearly every local workforce development board was represented and Ms. Glenn Grant expressed CareerSource Florida’s appreciation for the participation in the event. The event was held at CareerSource Capitol Region’s new career center. She thanked CareerSource Capitol Region Executive Director Jim McShane and the local team for hosting. She also encouraged any local board members who may be interested in touring that facility to contact us and we will set that up. As background, Ms. Glenn Grant reminded the committee that these meetings with local board leaders is an opportunity to meet face-to-face and discuss near term and strategic issues as well as best practices that influence our mutual goals.

She noted that not only is CareerSource Florida going through a President and CEO search but several local boards are also in transition as some current leaders have or are scheduled to retire.
They are:

- Executive Director Sheryl Rehberg of CareerSource North Florida retired. Diane Head is now the Executive Director;

- President/CEO Richard Stetson retired from CareerSource Research Coast and the local board is expected to consider the appointment of Brian Bauer as the new CEO; and

- Executive Director Linda Sumblin of CareerSource Okaloosa Walton announced her retirement and that board is expected to start its search.

Ms. Glenn Grant also thanked CareerSource Florida Director of Government Relations April Money for her presentation to the group on the upcoming legislative session and CareerSource Florida Director, Research & Analytics Rob White for his update on the Performance Funding Model.

Many local leaders also stayed in Tallahassee to participate in the Career Pathways Symposium hosted by board member Chancellor Rod Duckworth and the Florida Department of Education. It was another opportunity for collaboration and discussion with more than 200 leaders participating from technical schools, career academies, college workforce deans as well as adult education program directors. The CareerSource Florida network was well represented by more than two dozen workforce leaders.

The next opportunity is the Governor’s Jobs Summit Feb. 2 - 3, 2017 in Orlando. Ms. Glenn Grant told the committee if anyone is interested in attending, please let us know.

Chairman Sikes thanked Ms. Glenn Grant and asked if there were any questions. Hearing none, he thanked the team and introduced Kevin Doyle.

PRESIDENT/CEO SEARCH COMMITTEE REPORT

Chairman Sikes introduced CareerSource Florida board member and Strategic Policy Council Chairman Kevin Doyle. Mr. Doyle is serving as chairman of the President/CEO Search Committee.

Mr. Doyle reported the search committee planned to have an aggressive timeline and the goal is to have a President and CEO candidate recommendation by the end of January. He thanked board members Elli Hurst and Arnie Girnun for serving on the committee. The search committee received more than 125 resumes. He spoke to the process and outlined the steps the search committee has taken in order to be very transparent and adhere to Sunshine Law. Mr. Doyle also explained that they have worked closely with Christine Daye, CareerSource Florida’s HR consultant, to rank the candidates. He thanked her for her assistance in this process. He said they are in the process of reviewing resumes and setting up interviews scheduled for Jan. 20 in Orlando.

At the conclusion of the process, the search committee will recommend three candidates to Chairman Sikes who will, in turn, make a recommendation to the Governor’s office. Mr. Doyle concluded his report and asked if there were any questions. Hearing none, Chairman Sikes thanked Mr. Doyle for his additional service to the board in this capacity. He also thanked Ms. Hurst and Mr. Girnun for their service in this capacity during this crucial time. Mr. Sikes then moved on to the next agenda item.
PUBLIC COMMENT/ OPEN DISCUSSION

Chairman Sikes opened the meeting up to discussion by the executive committee members. Hearing none, Chairman Sikes asked if there were any comments or question from the public. No comments were made. Chairman Sikes moved to his closing remarks.

CLOSING REMARKS

Chairman Sikes thanked the executive committee members for their time and participation in the meeting. He told the members he looked forward to seeing each of them in Tallahassee next month. He also highlighted the upcoming meeting calendar:

UPCOMING MEETINGS

- Day at the Capitol, Board of Directors & Related Meetings — Feb. 6-8, 2017 – Tallahassee
- Board of Directors & Related Meetings — May 16-17, 2017 – St. Petersburg
- Board of Directors & Related Meetings — August 8-9, 2017 – Teleconference
- Workforce Professional Development Summit/Board of Directors & Related Meetings — Oct. 23-26, 2017 – Orlando

The meeting was adjourned at 10:35 a.m. ET.
Consent Item 3

APPROVAL OF INDIVIDUAL TRAINING ACCOUNTS WAIVER

CareerSource Capital Region submitted a request to reduce its ITA Waiver from last year’s 35% to 30% applicable to the 2016-2017 fiscal year. The application has been reviewed and found to comply with all criteria required in CareerSource Florida Strategic Policy 2012.05.24.A.2.3 and Department of Economic Opportunity Final Guidance-074 (DEO FG-074).

The CareerSource Florida Executive Committee is authorized to appoint a Waiver Review Committee to recommend specific actions to the full board, or, as specified in the CareerSource Florida bylaws, the executive committee may act on behalf of the Board. It is recommended that the executive committee itself act as the Waiver Review Committee to expedite this matter.

CareerSource Florida staff members have thoroughly reviewed the application and have found no additional information needs to be provided. Following this review, the recommendation is the approval of CareerSource Capital Region’s ITA Waiver Application.

NEEDED ACTION

Approve CareerSource Capital Region’s ITA Waiver request.

Supporting Document

CareerSource Capital Region ITA Waiver Application
WAIVER APPLICATION –
50% ITA EXPENDITURE REQUIREMENT

Local Workforce Area (LWA) 5 -
Gadsden, Leon & Wakulla Counties

August 30, 2016
A. REQUESTED REDUCTION FROM STATUTORILY REQUIRED ITA RESERVE

Big Bend Jobs & Education Council, Inc. d/b/a CareerSource Capital Region (CSCR) (LWA 5) is requesting a waiver of its 50% ITA statutory requirement for Individual Training Accounts (ITA) to 30% for the 2016/2017 program year. This reduction for the 2016/2017 program year will allow our system to better meet the needs of our local career seekers and the business community and make up the unmet ITA expenditure requirement from 2014/2015 of $409,659 (24% of expenditures).

With the waiver in place for the 2015/2016 program year, the LWA was able to accomplish the following:

- Increased employer focused events (recruitments, hiring fairs, job fairs) by 25% between program years 2014/2015 (52) and 2015/2016 (65) demonstrating CSCR’s commitment to fostering an integrated, job-driven public workforce system that links diverse talent to our local businesses.
- Placed nearly 8,000 customers in employment.
- Stabilized our expenditure rate on direct training costs.
- Expended sufficient funds on support services (ancillary expenses such as uniforms, supplies, and certification and licensure fees) which are required for participants to successfully complete training and obtain self-sufficient employment.

The below chart reflects Region 5’s expenditure levels for 2013/2014, 2014/2015, and 2015/2016:

<table>
<thead>
<tr>
<th></th>
<th>ITA-related Expenditures</th>
<th>OJT/EWT Expenditures</th>
<th>Support Services Expenditures</th>
<th>% of WIA Adult/DW Expended ITA/OJT/EWT</th>
<th>% of WIA Adult/DW Expended on Support Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY 13/14</td>
<td>$883,682</td>
<td>$875</td>
<td>$667,703</td>
<td>48%</td>
<td>36%</td>
</tr>
<tr>
<td>PY 14/15</td>
<td>$559,671</td>
<td>$3,200</td>
<td>$465,774</td>
<td>35%</td>
<td>46%</td>
</tr>
<tr>
<td>PY 15/16</td>
<td>$195,215</td>
<td>$11,200</td>
<td>$99,931</td>
<td>11%</td>
<td>6%</td>
</tr>
</tbody>
</table>

CSFR has implemented targeted strategies to ensure the required expenditure level was met:

- Continued marketing and outreach efforts to current students receiving training in demand occupations that aligned with the regional Approved Training Provider/Programs List (ATPL).
- Followed the state’s guidance that authorized, when necessary, funds to be coordinated in a manner that allows students to utilize their Pell grant to assist with their other education-related costs (such as living expenses), while the ITA would be used to cover their direct training costs.
A.1 How the reserved training funds will be spent for ITAs and each of the other authorized training services

If this request for a waiver extension is approved, the reserved training funds will continue to be spent on ITAs for occupational skills training, local Incumbent Worker Training (IWT) and On-the-Job Training (OJT) at the target level of (30%). This will enable CSCR to continue to meet our tri-county region’s demand for training without any reduction or elimination in training services. Simultaneously, we will continue to cover shortfalls resulting from other program areas such as Veterans, Wagner-Peyser and SNAP E&T that do not have sufficient funding to meet current needs, and better meet the needs of our career seekers and employers. Under WIOA, CSCR will coordinate OJT services with mutual Vocational Rehabilitation participants in order to assist with the cost of training to enhance services and increase opportunities for self-sufficient employment.

A.2 How the redirected training funds will be spent for other services

For 2015/2016, CSCR continued operating under a revised service delivery model that was designed to enhance regional performance tied to placements, employer engagement and to ensure that our primary emphasis was on returning (or introducing) individuals to the workforce in an expedited manner. CSCR will continue to track the number of employers that we are engaging in our system, and in turn, the services that we provide to them. CSCR was very successful in 2015/2016, increasing the level of employer penetration as documented by the achievement of the employer engagement incentive.

Services to Employers
Redirected reserve funds will provide the resources needed to continue to effectively engage employers in our region by:

- Ensuring we have the necessary staff to engage the employer community in order to obtain and post their jobs and match them with qualified career seekers.
- Allowing the Business & Employer Solutions (BES) team to effectively identify the talent needs of the employers in order to effectively coordinate with training providers to ensure those needs are met.

Increasing employer outreach and supportive materials for information on using the workforce system and its benefits.

Modified Service Delivery Model in One-Stops
As we develop partnerships with employers, we need to ensure that we are fulfilling our promise to match them with the best local talent. As we are not able to increase staffing to meet this demand, we must be creative in our approach. The 2016/2017 program year is being used to overhaul our service delivery model to ensure our limited staff resources are used to provide services in an innovative, customer-focused manner as well as to ensure that meeting the needs of our local business community is the core of our operations. With the passage of the Workforce Innovation and Opportunity Act (WIOA), we have reaffirmed the role of the career seeker-focused one-stop delivery system and are working to enhance and increase coordination among several key employment, education, and training programs. In the 2016/2017 program year, we will fully transition to a consultative approach to case management to further improve our effectiveness with our participants. Career guidance will
be at the core of our approach with the staff increasing their job knowledge in the following key areas: current labor market information, understanding career pathways, and adopting more in-depth assessment tools and strategies to best detect the potential in the career seeker. This means an increase in the provision of career services.

**Assessment Testing and Workshops**
Assessments continue to be a value-added service to employers as career seekers are able to demonstrate their skills in a variety of areas prior to being hired. While reductions had to be made to the work readiness team in past years to accommodate changes in funding, we’ve maintained that this service is a value-added benefit to local employers who may not have the resources to conduct such testing on their own. They will also be key components in our consultative approach to case management and ensuring effective career advising.

The Transferable Occupation Relationship Quotient (TORQ) was added to the assessment toolkit for career seekers as it is recognized as a simple-to-use online tool that links occupations based on the abilities, skills, and knowledge required by workers in a vast number of occupations. This additional resource helps staff to perform an analysis that shows how closely the skill matches are and recommends additional training options to help close the knowledge or skills gaps. Additionally, CSCR has increased the types and increments of workshops available to career seekers to aid them in conducting an effective job search campaign. Redirected funds will continue to support enhanced assessment testing and workshops.

**Support Services**
In addition to assisting participants with funding their direct training costs, we must also consider non-ITA eligible ancillary expenses related to completing training which include: uniforms, supplies/equipment and certification/licensure fees. Funding to cover direct training costs impacts participants’ ability to attend and complete training. Funding, or a lack thereof, to cover certification, licensure and work-related supplies affect the participants’ abilities to obtain employment at a self-sufficient wage. Essentially, CSCR operates under the notion that training and support services are required to ensure the overall participants’ success.

**B. EXCEPTIONAL CIRCUMSTANCES FOR WAIVER CONSIDERATION**

There are a number of exceptional circumstances that warrant consideration for this waiver extension request. While we realize that we do not need to speak to all of them, we believe that there are factors present in the following areas that warrant the committee’s consideration as further outlined below.

**B.1 Substantially greater demand for career, training, and supportive services, and business services, relative to training services**

For Program year 2015/2016, CSCR provided the following core and intensive services (including both Wagner-Peyser and WIOA):
<table>
<thead>
<tr>
<th>Core Services</th>
<th>Intensive Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>PY 14/15</td>
<td>17,185</td>
</tr>
<tr>
<td>PY 15/16</td>
<td>58,210</td>
</tr>
</tbody>
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**Note:** The decrease in the number of intensive services for PY 2015-2016 is directly correlated to our suspending WIOA enrollments for six months until sufficient guidance was received, reviewed, and formulated into local policy.

As the competition continues to be arduous in today’s job market, our career seekers are competing with many populations who, in many cases, possess knowledge, skills and prior work histories that exceed theirs or they otherwise just do not meet the needs of the local employers. The resulting situation is career seekers who may be unsuccessful with completing training, or training completers who become disenfranchised due to their inability to find training-related employment. In these instances, it becomes difficult for staff to continue to engage them and therefore, additional follow-along services are required. In turn, costs increase as well as the amount of staff/staff time needed to provide the appropriate level and mix of services.

While training services are appropriate for some career seekers, there are many more who are better served by receiving career services with focused efforts to attain needed skills and subsequently, enter employment quickly. CSCR seeks to move participants into unsubsidized employment as expeditiously as possible while providing services to those with barriers to employment. We operate the WIOA program in a manner that allows career seekers receive available services based upon their identified needs. Career seekers who are already enrolled in training at the time they request assistance to complete their studies and/or to obtain the appropriate certification and/or licensure from CareerSource Capital Region may advance directly to training dependent upon an initial assessment.

Additionally, labor market information shows that the region has a significant population of career seekers deemed “long-term unemployed.” While retooling is an option for some, most career seekers require individualized career services to gain the skills needed to reconnect with employment. The career seekers determined not to be in need of training require staff-assisted services such as job search assistance, labor market information, staff-assisted workshops and follow-up services. Career seekers who lack the skills, education or interest needed to complete training within occupations deemed to be in demand for our region are often good candidates to only receive career services.

CSCR has increased employer outreach efforts to increase awareness of work-based training opportunities (transitional jobs, local incumbent worker training, and on-the-job training). CSCR has noted an increase in employer interest and is diligently working to increase employment and retention.

**B.2 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**

Our 2016/2017 program year’s WIOA Adult & DW allocations total $1.77M; however, our 2016/2017 budgeted costs for WIOA Adult & DW programs totals $3.33M. The result is a shortfall of (-$1.56M). In order to maintain the current level of employer services and career seeker support services, while meeting the requested 30% ITA expenditure requirement, carryover funding must be utilized.

CareerSource Capital Region is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. Persons using TTY/TTD equipment use Florida Relay Service 711.
C. HOW CURRENT AND LONG-TERM UNEMPLOYMENT RATE FOR THE REGION WILL BE IMPACTED BY A WAIVER

With additional special grant projects being awarded to Florida during the past program year, it is noted there has been an increased effort from the federal level to increase workforce engagement of those considered long-term unemployed who have been out of work in excess of 26 weeks. Due to the anticipated local increased efforts to engage these career seekers and connect them to transitional jobs, on-the-job training, and occupational skills training, the cost of doing business will increase due to the length of time in training to update their skills levels or learn new skills which impedes timely performances outcomes. The waiver will allow the region to increase opportunities for these impacted workers and provide additional supportive services which are much needed by the population who have been surviving in less than self-sufficient circumstances and in many cases, poverty.

We have reviewed our service delivery to ensure: 1) that our career seekers receive direct assistance with resume writing, interviewing skills, job searching, their EFM profiles, etc.; 2) the staff and expertise is available to connect those work-ready career seekers with diverse and competitive job opportunities; and 3) we have the appropriate business solutions team in-place to effectively penetrate the business community and target our employer outreach based upon the current and future talent supply in our region. This enhanced service delivery model requires additional support without redirecting funding.

D. EFFORTS TO INCREASE DEMAND FROM INDIVIDUALS TO MEET MARKET NEEDS (TO ADDRESS THE ‘TALENT GAP’)

We continue to work closely with the Center for Workforce Development at Tallahassee Community College to create best practices for partnerships between education and workforce development. TCC’s Vice President of Workforce Development Kimberly Moore and CareerSource Capital Region CEO Jim McShane both realize the benefits associated with identifying employers in need of skilled and trained workers and matching them with the services offered by both organizations. This partnership not only allows the workforce and education system to demonstrate our ability to collaborate to assist local employers with creating meaningful solutions for their talent needs, but it will also allow career seekers to obtain industry-recognized credentials that will lead to meaningful career opportunities.

CareerSource Capital Region also reaches out to training providers to encourage them to submit a training provider application based upon a realized need. This level of proactivity allows our regional ETPL to be truly reflective of the demand occupations in our region. While customer choice is paramount, our goal is to ensure that our local ETPL includes training opportunities that meet the needs of local employers and provide an opportunity for our local career seekers to make informed choices. Also, through our career counseling process, customers are provided with labor market information for our region (and other areas if so requested). This information allows them to determine their next steps based upon their interests, skills, and abilities as well as the needs of local employers. Our intent is for our ETPL to align with this information.
Additionally, our service delivery, the Integrated Service Delivery Model, is designed in a way that allows all staff members to screen for basic WIOA suitability/eligibility and provide information regarding the availability of training assistance. In the integrated model, staff are responsible for managing a case load of career seekers covering all programs. With this approach, every career seeker is screened for WIOA eligibility/suitability. During initial customer triage, the Customer Service staff uses active listening skills for keywords that will alert them of a customer’s potential to be served under the WIOA program. Staff makes every effort to have their career seekers co-enrolled in WIOA in order to leverage funding, specifically training dollars.

Our internal and external outreach efforts are planned to best utilize staff time and yield the greatest return on possible ways to utilize ITA funds. During programmatic and general orientations (such as PREP), program staff conducts an assessment of the customer’s skills, work experience, and interests. The PREP pool of customers is a valuable pipeline for training opportunities to assist in their returning to work as expeditiously as possible. As such, these customers are provided information on WIOA, are screened for eligibility/suitability, and made aware of the option to receive assistance with training costs.

CSCR staff visits the local training institutions frequently in order to determine if there are students needing additional assistance to complete their training. This particular effort has yielded the greatest return on investment as we have developed relationships with many schools of study which allows our staff to schedule on-campus information sessions/eligibility appointments. Our list of approved training provider/programs is updated as necessary, and posted to our website for the general public’s viewing. There is a general email available on the website to field questions regarding training assistance. Staff track these emails and respond expeditiously. Most offices conduct in-house informational sessions and when necessary, one-on-one sessions are conducted as a convenience for our customers.

E. BUDGET

See Attachment A

The following information shall serve as supplemental information for the attached budget:

Fringe Benefits breakout for board staff:
- 401K: $67,425
- Health Insurance: $95,700
- Dental Insurance: $12,600
- FICA: $66,954

Professional fees are captured in the following line items:
- Legal Fees: $18,000
- Audit Fees: $19,000

Travel budget totals $51,000 which includes local and out-of-town travel for conferences and training for all Board staff.
F. ORGANIZATIONAL CHART
See Attachment B

G. STAFFING INFORMATION

Number of Full time & Part time Employees:
- Board Staff – 20 FT/PT Employees.
- Service Provider Staff – 47 FT Employees.
- DEO Jointly Managed Staff – 10 FT Employees.

Number of employees designated as supervisory/managerial and those that also provide direct services:
- Board Staff – 7 supervisory/managerial employees; one provides direct services to employers
- Service Provider Staff – 12 supervisory/managerial employees; with 5 providing direct services
- DEO Jointly Managed Staff – 1 supervisory/managerial employee who does not provide direct services

H. DOCUMENTATION THAT THE REGIONAL BOARD AND THE CHIEF ELECTED OFFICIAL HAVE APPROVED THE WAIVER REQUEST
See Attachment C

I. AGREEMENT

If the conditions warranting this waiver should change, the Big Bend Jobs & Education Council, Inc. d/b/a CareerSource Capital Region – RWB 5 agrees to comply with the ITA reserve requirements. Further, CareerSource Capital Region will notify CareerSource Florida of such compliance.

J. CUSTOMERS AND SERVICES DATA

<table>
<thead>
<tr>
<th>2014/2015</th>
<th>Career Seeker Services¹</th>
<th>Counseling/Pre-Training</th>
<th>Training</th>
<th>Business Outreach¹²</th>
<th>Placements and Obtains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services Provided</td>
<td>158,498</td>
<td>1,125</td>
<td>537</td>
<td>12,772</td>
<td>N/A</td>
</tr>
<tr>
<td>Customers Served</td>
<td>22,094</td>
<td>650</td>
<td>440</td>
<td>2,623</td>
<td>8,652</td>
</tr>
</tbody>
</table>

¹This number reflects staff-assisted services only (self-services were excluded)

Placements decreased slightly between 2014/2015 (8,652) and 2015/2016 (7,934) as the unemployment rate has stabilized and remains consistently low for the LWA. We believe that with a continued focus on increasing training services and the region’s employer engagement, placements will continue to remain steady.

As discussed in a previous section in this application, our goal is to focus the region’s limited resources on increasing our presence with employers and on preparing career seekers for
career opportunities. These efforts were fruitful as our services to employers increased from 12,772 in 2014/2015 to 17,483 in 2015/2016. The following chart represents our estimated projections for 2015/2016 in the event that the waiver is not granted:

<table>
<thead>
<tr>
<th>2015/2016</th>
<th>Career Seeker Services¹</th>
<th>Counseling/Pre-Training</th>
<th>Training²</th>
<th>Business Outreach¹</th>
<th>Placements and Obtains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services Provided</td>
<td>189,001</td>
<td>1,932</td>
<td>133</td>
<td>17,483</td>
<td>N/A</td>
</tr>
<tr>
<td>Customers Served</td>
<td>21,797</td>
<td>1,738</td>
<td>126</td>
<td>1,229</td>
<td>7,934</td>
</tr>
</tbody>
</table>

¹This number reflects staff-assisted services only (self-services were excluded)
²Due to the enactment of WIOA, CSCR suspended enrollments for a period of 6 months until sufficient guidance was received, reviewed, and formulated into local policy.

CSCR’s rationale for anticipated reduction in services and placements from 2014/2015 to 2015/2016 is that as we focus more of our attention and resources on direct training costs, our available resources for other services will be decreased.

Regarding business outreach and engagement by our BES team, CSCR has a total of six (6) employees within this department; 1 FTE for Senior Director, 1 FTE for a Business Solutions Manager, 2 FTEs for Account Executives and 2 DEO FTEs for Business Solutions Representatives. The Special Grants department which has a total of 3.5 employees, including 1 DEO FTE for LVER and 1 FTE for a HR Business Partner provides significant support to the BES team as well.

The Business Solutions department is currently housed primarily within the Administrative Office of CareerSource Capital Region with outreach occurring within the Career Centers in each county. The BES team conducts outreach to businesses within the region with which a professional relationship already exists, as well as “new businesses” that can benefit from the solutions offered. Outreach is conducted through employer meetings, job/hiring fairs, attendance at Chamber of Commerce events, Industry Sector events, weekly meetings with BNI, Big Bend Society for Human Resources meetings and events, as well as events hosted by CareerSource Florida and Department of Economic Opportunity.

We have fully implemented the Salesforce™ Customer Relationship Management (CRM) system for better communications, employer relationship management and survey distribution and feedback. In our service delivery model, the BES team communicates to employers the variety and breadth of our system’s expertise. These solutions include job postings in the Employ Florida Marketplace system, talent sourcing, recruiting, applicant screening, professional development training, industry trends, specialized recruitment events, job/hiring fairs, and lay-off assistance. It is also the responsibility of the BES team to share information related to business incentives as well as the events hosted by CSCR such as Power Hour, a lunch & learn series featuring expert speakers, presenting various topics of interest specific to business leaders and HR professionals. And the Industry Sector Hiring Fairs and Job Fairs, to include IT and Professional Services, Government and Non-Profit, Manufacturing and Construction and Health Care to name a few.

CareerSource Capital Region is an equal opportunity employer/programs. Auxiliary aids and services are available upon request to individuals with disabilities. Persons using TTY/TTD equipment use Florida Relay Service 711.
Through the relationships with the business community, Chamber of Commerce and Economic Development organizations, CSCR stays connected to the current and future talent needs of employers in our region. Knowing these needs is critical to ensuring that we realize our vision of being the recognized leader for talent creation and also ensuring the career seekers in our region are job ready. In turn, we can communicate these needs to educational institutions to ensure training programs exist and are in alignment. We are also able to better utilize our training dollars to create the talent pool our employers need.

Our board membership also creates another opportunity to collaborate effectively. CSCR’s board seats are held by local school district leadership, private and public colleges and university leadership, etc. CSCR’s partners with educational institutions within the region with respect to grant opportunities, share labor market information and training incentives such as On the Job Training, Quick Response Training, and Employed Worker Training. Also, a board seat is held by a leader with the regional Economic Development Council, which provides for an increased level of collaboration with existing and new businesses coming into the region.

At the onset of the 2015/2016 program year, CSCR launched its Business Partnership Advisory Council (BPAC) - a group of executive-level professionals advocating on behalf of the solutions provided by CSCR. BPAC includes representatives from the in-demand industries within the region. The purpose of BPAC is to provide business intelligence from similar level professionals of the business community in order to provide another avenue for CSCR to stay connected to the business community and understand current and future talent needs. The first year yielded great results including council members hiring career seekers directly from CSCR programs.

### K. A LIST OF FY 2015-16 ITAS FOR YOUR REGION BY CATEGORY FOR WIA ADULTS AND DISLOCATED WORKERS

<table>
<thead>
<tr>
<th>ITA Occupation Description</th>
<th># Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Practitioners &amp; Technical</td>
<td>64</td>
</tr>
<tr>
<td>Computer &amp; Mathematical</td>
<td>11</td>
</tr>
<tr>
<td>Transportation &amp; Material Moving</td>
<td>28</td>
</tr>
<tr>
<td>Healthcare Support</td>
<td>10</td>
</tr>
<tr>
<td>Office Administration &amp; Support</td>
<td>1</td>
</tr>
<tr>
<td>Management</td>
<td>1</td>
</tr>
<tr>
<td>Customer Service</td>
<td>1</td>
</tr>
<tr>
<td>Protective Services</td>
<td>5</td>
</tr>
<tr>
<td>Dental Hygiene</td>
<td>5</td>
</tr>
</tbody>
</table>
L. RECENT EFFORTS BY THE REGION TO STREAMLINE OR AUTOMATE SERVICE DELIVERY THROUGH THE ONE-STOP CAREER CENTERS

Over the last several years the region has taken a number of steps to streamline or automate service delivery. These steps include:

- **System Integration** – In the face of decreasing funding, CSCR continues to think both creatively and strategically to assess our service delivery model and how we integrate services. This includes moving to an integrated service delivery model as of August 1, 2016. The integrated model allows case management efforts to be targeted vs. duplicated and allows for sharing of direct program-related costs. Also, this model forces staff to be trained on WIOA program eligibility. In turn, this allows for important program connections and referrals to be made from multiple points throughout our system. CSCR will continue to review and make changes to its service delivery to further reduce other areas of possible duplication.

- **Automated Orientations and Workshops** – Although this effort has not been fully realized, we will be utilizing the Atlas system and our website to deliver automated and online orientations and workshops. This automation will reduce the staff time needed to physically facilitate each workshop or orientation and assists the customer by reducing travel time and costs associated with coming to our office.

- **E-fax** – We’ve instituted an eFax system that allows customers to submit documentation needed to demonstrate program participation from any location with a fax machine. The Career Specialists then have this information electronically and can either enter the data themselves or be supported by another staff person who can access the submitted documents electronically.

- **Electronic Records System** – We have purchased the Atlas system that allows more customer self-service through a kiosk that is positioned at our three (3) Career Centers. When fully implemented, this software will allow us to reduce copying costs, add more consultation time with customers, and overall create a more efficient and paperless system. This will eventually reduce filing costs, storage costs and destruction/shredding costs. CSCR has implemented the last phase in the electronic record system process which is to allow customers to scan documents into the management system.
CAREERSOURCE CAPITAL REGION
FINANCIAL BUDGET
FISCAL YEAR 2016-2017
CONSOLIDATED

<table>
<thead>
<tr>
<th></th>
<th>2015-2016 APPROVED BUDGET</th>
<th>2016-2017 PROPOSED BUDGET</th>
<th>VARIANCE</th>
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</thead>
<tbody>
<tr>
<td><strong>PROGRAM REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Anticipated revenue</td>
<td>$6,924,575</td>
<td>$7,346,589</td>
<td>$652,014</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>$6,924,575</td>
<td>$7,346,589</td>
<td>$652,014</td>
</tr>
<tr>
<td><strong>DIRECT PROGRAM COSTS:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participant Tuition &amp; Fees / Training</td>
<td>$750,000</td>
<td>$1,260,000</td>
<td>$510,000</td>
</tr>
<tr>
<td>Books &amp; Supplies</td>
<td>$45,000</td>
<td>$45,000</td>
<td>$0</td>
</tr>
<tr>
<td>Uniforms</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$0</td>
</tr>
<tr>
<td>Transportation &amp; Incentives</td>
<td>$80,000</td>
<td>$60,000</td>
<td>($20,000)</td>
</tr>
<tr>
<td>Testing/Certifications</td>
<td>$70,000</td>
<td>$70,000</td>
<td>$0</td>
</tr>
<tr>
<td>Primary Services Contract - One-Stop Operations</td>
<td>$2,179,000</td>
<td>$2,600,000</td>
<td>$421,000</td>
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<tr>
<td>Work Experience</td>
<td>$425,000</td>
<td>$705,000</td>
<td>$280,000</td>
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<tr>
<td>Economic Development/Industry Analysis</td>
<td>$35,000</td>
<td>$35,000</td>
<td>$0</td>
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<tr>
<td>CareerSource Express</td>
<td>$22,000</td>
<td>$22,000</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Program</strong></td>
<td>$3,626,000</td>
<td>$4,817,000</td>
<td>$1,191,000</td>
</tr>
<tr>
<td><strong>ALLOCATED COSTS &amp; EXPENSES:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries &amp; Benefits/Payroll Services</td>
<td>$1,290,000</td>
<td>$1,220,000</td>
<td>($70,000)</td>
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<tr>
<td>Accounting &amp; Auditing</td>
<td>$22,000</td>
<td>$19,000</td>
<td>($3,000)</td>
</tr>
<tr>
<td>Advertising &amp; Marketing</td>
<td>$85,000</td>
<td>$85,000</td>
<td>$0</td>
</tr>
<tr>
<td>Board Expenses</td>
<td>$6,500</td>
<td>$6,500</td>
<td>($6,500)</td>
</tr>
<tr>
<td>Cell Phones/Pagers</td>
<td>$6,500</td>
<td>$6,500</td>
<td>($6,500)</td>
</tr>
<tr>
<td>Conferences &amp; Seminars</td>
<td>$9,000</td>
<td>$11,000</td>
<td>($2,000)</td>
</tr>
<tr>
<td>Dues &amp; Memberships</td>
<td>$13,000</td>
<td>$13,000</td>
<td>$0</td>
</tr>
<tr>
<td>Facility Rent</td>
<td>$621,803</td>
<td>$471,089</td>
<td>($150,714)</td>
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<tr>
<td>Furniture</td>
<td>$282,773</td>
<td>$15,000</td>
<td>($267,773)</td>
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<tr>
<td>Insurance</td>
<td>$22,000</td>
<td>$22,000</td>
<td>$0</td>
</tr>
<tr>
<td>Legal &amp; Professional Fees</td>
<td>$68,000</td>
<td>$68,000</td>
<td>$0</td>
</tr>
<tr>
<td>Maintenance Contracts</td>
<td>$17,000</td>
<td>$17,000</td>
<td>$0</td>
</tr>
<tr>
<td>Postage</td>
<td>$8,000</td>
<td>$8,000</td>
<td>$0</td>
</tr>
<tr>
<td>Recruiting/Staff Development/Recognition</td>
<td>$22,000</td>
<td>$22,000</td>
<td>$0</td>
</tr>
<tr>
<td>Rentals</td>
<td>$35,000</td>
<td>$35,000</td>
<td>$0</td>
</tr>
<tr>
<td>Repairs &amp; Maintenance</td>
<td>$86,000</td>
<td>$25,000</td>
<td>($61,000)</td>
</tr>
<tr>
<td>Security</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$0</td>
</tr>
<tr>
<td>Supplies</td>
<td>$39,000</td>
<td>$39,000</td>
<td>$0</td>
</tr>
<tr>
<td>Systems/Telephone</td>
<td>$375,000</td>
<td>$350,000</td>
<td>($25,000)</td>
</tr>
<tr>
<td>Temporary Help</td>
<td>$0,000</td>
<td>$22,000</td>
<td>$13,000</td>
</tr>
<tr>
<td>Travel</td>
<td>$51,000</td>
<td>$51,000</td>
<td>$0</td>
</tr>
<tr>
<td>Utilities</td>
<td>$5,000</td>
<td>$5,000</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Allocated</strong></td>
<td>$3,068,575</td>
<td>$2,529,589</td>
<td>($538,986)</td>
</tr>
<tr>
<td><strong>TOTAL COSTS AND EXPENSES</strong></td>
<td>$6,694,575</td>
<td>$7,346,589</td>
<td>$652,014</td>
</tr>
<tr>
<td><strong>TOTAL PROGRAM FUNDS AVAILABLE</strong></td>
<td>$7,905,114</td>
<td>$8,063,489</td>
<td>$158,385</td>
</tr>
<tr>
<td><strong>SURPLUS OF TOTAL PROGRAM FUNDS AVAILABLE</strong></td>
<td>$1,210,539</td>
<td>$716,880</td>
<td>($493,659)</td>
</tr>
</tbody>
</table>

**SURPLUS**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>WIOA</td>
<td>$208,676</td>
</tr>
<tr>
<td>Other</td>
<td>$508,204</td>
</tr>
<tr>
<td>Total</td>
<td>$716,880</td>
</tr>
</tbody>
</table>

** Per the recommendation of the Finance Committee, a minimum surplus of $200,000 will be maintained to ensure that Fiscal Year 2017-18 budget is adequately funded.**
August 30, 2016

To the CSF Waiver Review Committee:

Thank you for your invitation to apply for a waiver of the 50% Individual Training Account (ITA) expenditure requirement. The attached application provides the requested information to substantiate Local Workforce Area (LWA) 5's request for a waiver as well as proposes possible alternatives for use of the additional funds if granted the decrease of the reserve to 30%.

We are pleased to offer support of CareerSource Capital Region's waiver request. With the waiver in place, we've been able to accomplish so many things that we can be proud of. We have:

- Put people back to work by placing nearly 8,000 career seekers in employment during 2015/2016.
- Increased employer focused events (recruitments, hiring fairs, job fairs) by 25% between program years 2014/2015 (52) and 2015/2016 (65) demonstrating CSCR's commitment to fostering an Integrated, job-driven public workforce system that links diverse talent to our local businesses.
- More than tripled the number of employers engaged in our region over the last three program years.
- Modified our service delivery model in our career centers, the Integrated Service Delivery Model, to ensure our limited staff resources are used to provide services in an innovative, customer-focused manner as well as to ensure that meeting the needs of our local business community is the core of our operations.

Sincerely,

[Signature]

Patrick Hutt, CareerSource Capital Region Board Chair

[Signature]

Commissioner Nick Maddox, Region 5 Workforce Consortium Representative

Toll Free: 1 (844) CAREER1
careersourcecapitalregion.com
Action Item 1

APPROVAL OF CAREERSOURCE FLORIDA INC. OFFICER – TREASURER

CareerSource Florida, Inc.’s bylaws state the Officers of the Corporation shall consist of a President, Secretary and Treasurer designated by the Board. The bylaws also state the Treasurer shall be the Chief Financial Officer of the corporation.

Following a nationwide search and selection process, Mr. Andrew Collins was selected as CareerSource Florida’s Chief Financial Officer. Mr. Collins also serves as Chief Operating Officer. The bylaws authorize the President to hire all employees.

The action before the CareerSource Florida Executive Committee is to affirm Mr. Andrew Collins as Treasurer.

Information regarding Mr. Collins’ professional background and experience is attached.

NEEDED ACTION

Vote to affirm Mr. Andrew Collins as Treasurer of CareerSource Florida, Inc.
Andrew Collins is Chief Operating and Financial Officer of CareerSource Florida, Inc., the nonprofit, public-private policy and investment board of business and government leaders charged with guiding workforce development for the state of Florida. In this role, Mr. Collins oversees the $300 million annual budget for Florida’s workforce system and provides policy guidance for investments that support the board’s emphasis on data-driven decision-making, performance and outcomes.

Mr. Collins has nearly 20 years of experience working for the state of Florida. Prior to joining CareerSource Florida, he oversaw Financial Monitoring and Accountability for the Department of Economic Opportunity. He was responsible for the development and execution of annual monitoring plans for nearly 500 agency grantees and sub-recipients with oversight of more than $989 million. He previously served in the Division of Property Tax Oversight for the Florida Department of Revenue, overseeing budget reviews, the central assessment of railroads and statewide ad valorem tax roll approval.

Mr. Collins lives in Tallahassee with his wife and two sons. He has master’s degrees in Applied Economics and Public Administration.
FY 2016-17 Corporate Goals

1. Position Florida across the Southeast region, and then nationally, as the top state for delivering talent solutions to meet the needs of business.

2. Enhance the ability of existing, emerging and evolving businesses to attract, develop and keep talent by improving CareerSource Florida’s products, services and talent delivery model.

3. Facilitate data-informed dialogue, decision-making, policy development and investment by the CareerSource Florida Board of Directors.
### Unemployment Rates (%)

<table>
<thead>
<tr>
<th></th>
<th>February 2017</th>
<th>January 2017</th>
<th>February 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>4.7</td>
<td>4.8</td>
<td>4.9</td>
</tr>
<tr>
<td>Florida</td>
<td>5.0</td>
<td>5.0</td>
<td>5.0</td>
</tr>
</tbody>
</table>

### Unemployment

<table>
<thead>
<tr>
<th></th>
<th>United States</th>
<th>Florida</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7,528,000</td>
<td>501,000</td>
</tr>
<tr>
<td></td>
<td>7,635,000</td>
<td>504,000</td>
</tr>
<tr>
<td></td>
<td>7,845,000</td>
<td>485,000</td>
</tr>
</tbody>
</table>

### Unemployment Rates (%)

<table>
<thead>
<tr>
<th></th>
<th>February 2017</th>
<th>January 2017</th>
<th>February 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>4.9</td>
<td>5.1</td>
<td>5.2</td>
</tr>
<tr>
<td>Florida</td>
<td>4.7</td>
<td>5.2</td>
<td>4.7</td>
</tr>
<tr>
<td>Cape Coral-Ft. Myers</td>
<td>4.4</td>
<td>5.0</td>
<td>4.4</td>
</tr>
<tr>
<td>Crestview-Ft. Walton Beach-Destin (Okaloosa and Walton)</td>
<td>4.1</td>
<td>4.8</td>
<td>4.2</td>
</tr>
<tr>
<td>Deltona-Daytona Beach-Ormond Beach (Flagler and Volusia)</td>
<td>5.1</td>
<td>5.7</td>
<td>5.1</td>
</tr>
<tr>
<td>Gainesville</td>
<td>4.1</td>
<td>4.7</td>
<td>4.0</td>
</tr>
<tr>
<td>Homosassa Springs (Citrus)</td>
<td>6.7</td>
<td>7.6</td>
<td>6.7</td>
</tr>
<tr>
<td>Jacksonville</td>
<td>4.5</td>
<td>5.2</td>
<td>4.6</td>
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<td>Nonagricultural Employment by Industry</td>
<td>February 2017</td>
<td>February 2016</td>
<td>Level Change</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>---------------</td>
<td>---------------</td>
<td>--------------</td>
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<td>by Industry</td>
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<td>Other Services</td>
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<th>Level Change</th>
<th>Percent Change</th>
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<td>by Metropolitan Statistical Area and Metropolitan Division</td>
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<tr>
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<td>Tallahassee MSA</td>
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<td>The Villages MSA</td>
<td>28,300</td>
<td>27,100</td>
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</table>

Florida Department of Economic Opportunity (DEO) | www.floridajobs.org
Media@deo.myflorida.com | 850-245-7110

**ECONOMIC BUZZ**

**Then**

- **RATE INCREASED TO 11.2%**
- **913,000 LOST JOBS**
- **700,000 REEMPLOYMENT ASSISTANCE CLAIMANTS REACH**
- **FLORIDA BORROWS $3.5 BILLION FROM FEDERAL GOVERNMENT**
- **ONLINE JOB ADS FELL TO 159,000**
- **48% MEDIAN HOME PRICES FELL FROM THE PEAK IN 2006 TO FEB. 2011**
- **VISITOR RATE FELL TO 81 MILLION**
- **$5.2 BILLION IN DEBT ADDED**
- **TAXES and FEES RAISED**
- **DEP permitting time: 79 days**
- **OFR application review time: 22 days**

**Now**

- **UNEMPLOYMENT RATE AS OF 01/2017 5.0%**
- **PRIVATE SECTOR JOB GROWTH 1,343,100 JOBS ADDED SINCE 12/2010**
- **REEMPLOYMENT ASSISTANCE 59,969 ACTIVE REEMPLOYMENT ASSISTANT CLAIMANTS 01/2016 05/2013 DEO REPAYED THE GOVERNMENT LOAN IN FULL**
- **JOB SUPPLY and DEMAND 255,690 ONLINE STATEWIDE JOB OPENINGS AS OF 01/2017**
- **MIGRATION NET INFLOW UP TO ABOUT 1000/DAY**
- **HOUSING MEDIAN HOME PRICES ARE UP OVER THE YEAR IN 01/2017 10%**
- **TOURISM 113 MILLION VISITORS IN 2016 1.2 MILLION Floridians Employed In Tourism**
- **STATE DEBT PAID DOWN $7.5 BILLION PAID**
- **TAXES/FEES - CUT TAXES 50 TIMES SINCE 2010 - MORE THAN 80% OF ALL BUSINESSES NO LONGER PAY THE BUSINESS TAX**
- **EFFICIENCY in GOVERNMENT DEP permitting time: 33 days OFR application review time: 5 days**
- **CONSUMER SENTIMENT TUMBLED**
- **GROSS DOMESTIC PRODUCT GDP DECLINED 6.3% IN 2009 GDP GREW 4.0% IN 2015**

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Data provided by: DEO Office of Communications
Revised 03/13/17
The CareerSource Florida network’s Performance Funding Model is a long-term commitment to reward achievement from year to year and drive long-term systemic change to help Florida become the global leader for talent. The model is designed to help the network identify, measure, reward and replicate success in order to better anticipate and address the employment and training needs of businesses, job seekers and workers statewide.

The model, whose development is funded by a federal Workforce Innovation Fund grant, seeks to drive stronger performance by measuring local workforce development boards on customized, agreed-upon goals, reflecting Florida-emphasized workforce development priorities, with aligned economic rewards for achievement.

In fiscal year 2015-16, local workforce development boards were evaluated on four metrics: Unemployed Placement Rate, Time to Earnings, Cost per Employed Exit and Business Engagement. CareerSource Florida will award up to $6.31 million in state-level workforce funding for inaugural-year performance awards. The following chart outlines recent awards announced for each board. More information is available at: [http://pfm.careersourceflorida.com/](http://pfm.careersourceflorida.com/).

<table>
<thead>
<tr>
<th>Local Board</th>
<th>Performance Awards</th>
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1 The amounts in the gray boxes in the Target column represent seven local boards that are eligible to receive funding with the submission of a Target Achievement Plan.

2 The totals reflect adjusted amounts accounting for the reevaluation of data to include the final quarter of fiscal year 2015-16 in the Cost per Employed Exit metric. Boards that may have experienced a reduction in the initial award announcement were held harmless and their award amounts remained unchanged.
SECTOR STRATEGIES: A CRITICAL TOOL TO DRIVE WORKFORCE AND ECONOMIC DEVELOPMENT

In today’s business climate, workforce development is vital to the success and growth of companies. Almost 70 percent of the respondents to a recent Florida Economic Development Council survey identified workforce development as one of their top three priorities. Over the last three years, 64 percent stated workforce has become a higher priority for their organization. The significant role of workforce development was highlighted in Area Development’s 30th Annual Corporate Survey in which respondents said their top concern is the availability of skilled labor. In fact, nearly 93 percent of respondents – 10 percent more than in the previous year’s survey – considered the availability of skilled labor “very important” or “important,” ranking availability even higher than labor costs.

As a result of the ongoing and growing importance of creating a talent pipeline to help businesses succeed, several national initiatives and federal laws – including the Workforce Innovation and Opportunity Act – are driving workforce organizations, in partnership with economic development and education, to embrace approaches to meet both the needs of workers and the needs of businesses in the regional economy.

**Sector strategies** are regional, industry-focused approaches to building a skilled workforce and are one of the most effective ways to align public and private resources to address the talent needs of employers. While the approach is not new, there is increasing evidence showing that sector strategies can simultaneously improve employment opportunities for job seekers and the competitiveness of industries.
SECTOR PARTNERSHIPS

At the heart of sector strategies are sector partnerships, sometimes referred to as industry partnerships, workforce collaboratives or regional skills alliances. These partnerships are led by businesses within a critical industry cluster working collaboratively with workforce development, education and training, economic development, labor and community organizations. Sector partnerships are the vehicles through which industry members voice their critical needs and where customized regional solutions for workers and businesses are formed.

EFFECTIVE SECTOR PARTNERSHIPS:

1. **Put businesses at the center** of the conversation. Partners often discover more immediate and broader workforce challenges when the discussion is business-led.

2. **Treat businesses as partners** not simply customers. In this model, community partners work with businesses to build customized solutions, rather than provide off-the-shelf, program-based solutions.

3. **Align partners.** Sector partnerships are driven by solutions. These solutions often require multiple partners collaborating and leveraging programs and funding.

4. **Require a credible third party “convener”**. This entity could be a local workforce development board or another organization. The convener acts as a neutral body, ready to guide the partnership and align partners.

5. **Are convened on a regional scale.** Because labor markets and industry clusters cross county and service area lines, so too must sector partnerships.

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CareerSource Chipola
Rural Labor Force Decline Study and Response Overview

CareerSource Chipola, in partnership with Opportunity Florida, has secured the services of VisionFirst Advisors to perform a detailed study of the general population, employed population and labor force in a nine-county area of Northwest Florida. The counties included are: Calhoun, Franklin, Gadsden, Gulf, Holmes, Jackson, Liberty, Wakulla and Washington. The study could provide insight into the declining labor force and the declining number of employed individuals who reside in this area.

Initial data shows the nine-county area has experienced a 6.5 percent decrease in the labor force and a 2.3 percent decline in the number of residents employed between 2010 and 2015. A declining labor force places the region in a detrimental position for recruiting new employers and hurts efforts to retain existing employers or convince employers that the region is an area in which they can expand their existing business footprint.

This study will help CareerSource Chipola and Opportunity Florida develop a defined action plan to reverse these trends and improve the economic health of the region.
Overview

The goals of the CareerSource Florida Network Cooperative Outreach Program, or co-op, are to:

1. Support local-state collaboration while strengthening the CareerSource Florida network brand statewide.
2. Incite action among Florida businesses and job seekers to obtain resources and services from the CareerSource Florida network to advance their business or career.
3. Assist local workforce development boards in connecting businesses with talent.
4. Offset communications outreach costs and support local efforts to increase awareness of network resources and services available to Florida businesses and job seekers.

Funding

Participating in the co-op program is voluntary. Local boards are invited and encouraged to participate within the following framework:

- Each local board is eligible for a funding credit based on board size to use in selecting the communications outreach tactics from the menu of options outlined later in this document:
  - Group 1 (LWDBs 2, 3, 4, 5, 6, 7, 9, 19) – $20,719 each
  - Group 2 (LWDBs 1, 10, 11, 13, 16, 17, 18, 20) – $27,219 each
  - Group 3 (LWDBs 8, 12, 14, 15, 21, 22, 23, 24) – $33,313 each

- The allocated credit must be applied toward the menu of options, to be managed by Moore Communications Group of Tallahassee, Florida, communications firm of record for CareerSource Florida.

- Total budget for outreach options and tools selected will cover associated development and management costs such as copywriting, graphic and web design fees, advertising placement costs, project management, etc.

How it Works

Each local workforce development board will schedule a one-hour planning call with Moore Communications Group (MCG) to discuss the communications menu options and to select choice(s). MCG will then provide the local workforce development board with a program of work document for signature that outlines the scope, timeline, budget, and MCG point of contact. The timeline will outline when approval is due from the local workforce development boards. CareerSource Florida will review and sign off on each local workforce development board’s program of work.

Menu of Communications Outreach Options & Tools

For examples of many of the outreach options and tools available and how such options were used by local workforce development boards in FY 2015-16, please see the final report at this link: 2015-16 CareerSource Florida Network Cooperative Outreach Program
I. Program/Initiative Branding
   a. Branding Ignition Package: There are two options below to choose from to brand programs and services provided by your local workforce development board.
      i. Full package (research, logo, tagline, message house and sub brand guidelines): $5,200 – $8,500
      ii. Logo (research and logo development): $3,250 – $4,750

II. Digital Marketing
   a. Advertising: Outlined below are three different options for digital advertising campaign placements.
      i. Google AdWords (search engine marketing and/or display network advertising) campaign: creative development, execution and management, and reporting. Price determined based on audience, timeframe and campaign(s). Price range:
         • $1,500 – $20,000 (placement and fees)
      ii. Social media advertising campaign and creative development, execution and management, and reporting. Price determined based on audience, timeframe and campaign(s). Price range:
         • $1,500 – $20,000 (placement and fees)
      iii. Additional digital placements (content marketing, business journal banner ads, etc.) campaign and creative development, set-up, management and reporting. Price determined based on audience, timeframe and campaign(s). Price range:
         • $3,000 – $20,000 (placement and fees)
   b. Internal Staff Digital Training: Select from two digital training options, depending on the needs and interests of your team. These trainings can be provided to two or more local boards at once to offset the cost.
      i. Digital advertising: Learn how to approach digital advertising, and the basics to setting-up digital advertising campaigns on self-serve platforms such as Facebook, Twitter and LinkedIn.
         • Half-day onsite: $4,000
      ii. Social media strategy and content planning: Learn how to develop and execute a content strategy that will help your communications team meet your local board’s corporate goals.
         • Half-day onsite: $4,000
   c. Social Media Platform Optimization and Graphics Refresh: This option includes an audit of the social media platforms listed below to ensure brand compliance, that there are not any unclaimed pages or missing information, and to provide recommendations for content, profile copy and images, and properly sized profile images, if applicable.
      i. Facebook, Twitter and LinkedIn (includes three stock photos for new cover images):
         • All three platforms: $2,500
         • Two platforms: $2,000
         • One platform: $1,500
   d. Digital Asset Development: Choose from the assets listed below to use on your website, in digital advertising campaigns, on social media or on a landing page.
i. Infographic: $500 – $3,000
ii. Banner ads (three different sizes): $500 – $2,000
iii. Whitepaper or guide (editing and design): $1,500 – $3,500
iv. Checklist, a common lead generating, downloadable asset (editing and design): $1,500 – $3,000
v. Videos: $3,000 – $20,000 (depending on shooting time, creative elements, music, voiceover and production)

**e. Landing Page:** This webpage will be built in Unbounce, a software provider of landing pages that allows for multi-variant testing (testing different versions of the landing page to improve conversions), and connected to your website as a part of a digital advertising campaign.

i. Development of design and layout, test two versions to optimize for conversions, connect to customer relationship management software or email marketing program, and connect to website url: $3,000 – $5,000

**f. Email Marketing:** You can select one of the three options below, or a combination, to elevate your email communication with job seekers and/or businesses.

i. Email strategy (a guide with email marketing best practices, ADA compliance, CAN-SPAM compliance and a strategy customized to your local board’s needs and goals, outlining list structure, frequency of emails, automated email recommendations and different types of emails and touch points for your target audiences): $2,000 – $4,000 (depending on complexity of lists and campaign(s))

ii. Email marketing campaign set-up and execution (set-up of outlined strategy): $2,000 – $10,000 (depending on complexity of lists, campaign(s) and timeframe)

iii. Email template design and HTML coding: $1,750

**g. Website:** Outlined below are four options for website enhancements and a new build.

i. Design and development (new website): $13,500 – $25,000

ii. Provide optimization recommendations (This includes an audit of the website, or select pages, and provides wireframe, mobile responsive, and content recommendations to improve user experience and achieve the goals outlined by your team): $2,000 – $10,000

iii. Search Engine Optimization (SEO) audit and recommendations: $2,000

iv. Search Engine Optimization (SEO) audit, recommendations and execution: $4,000

### III. Print

**a. Brochure or Other Collateral Piece (pocket folder, one-pagers, palm cards, business cards, pop-up banners, or another custom piece)**

i. Graphic design (tri-fold): $500 – $4,000 *(printing not included; design file to be provided for local printing)*

ii. Management of printing process and delivery: $500 – $5,000

**b. Advertising**

i. Graphic design: $500 – $5,000

ii. Buy and management of placements: $1,000 – $30,000

### IV. Outdoor Advertising
a. Billboard
   i. Graphic design: $2,000 – $4,000
   ii. Buy and management of placements: $2,000 – $30,000

b. Public Transportation Signage
   i. Graphic design: $3,000 – $4,000
   ii. Buy and management of placements: $2,000 – $30,000

V. Apparel and Job Seeker and Employer Takeaway Items
   a. Design and management of buy for short or long sleeve polo shirts: $500 – $1,000
      (Doesn’t include the cost of the shirts, hard costs depend on quantity and material):
      i. Cost of the polo shirts can also be covered with your co-op credit
   b. Design and management of buy for takeaway items (pens, USB drives, notepads, etc.,
      that meet informational and outreach item requirements): $500 – $2,000 (Doesn’t
      include the cost of the item, hard costs depend on quantity, item and material):
      i. Cost of takeaway items can also be covered with your co-op credit

Disclaimer: Budget provided is an estimate based on average costs and may vary based on scope of
work. The exact budget will be determined from the planning call and provided in the program of work.

Questions?
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Board Discretionary Funding History

FY 2013-14
- Unified Branding Initiative
- Supplemental Funding - Incumbent Worker Training Program
- Regional/LWDB Performance Incentives

FY 2014-15
- Statewide Sector Strategy Councils: Florida Healthcare Workforce Leadership Council & Florida Advanced Manufacturing Workforce Leadership Council
- Market Intelligence Portal
- Performance Funding Model
- Regional Innovation Funds*
- Rural Initiatives
- AmeriCorps Workforce Pilot**

FY 2015-16
- Integrated Communications, Cooperative Outreach, Salesforce CRM
- DJJ Youthful Offender Partnership
  (No supplemental IWT funding)

FY 2016-17
- Additional WIOA Formula Distribution
- Governor's Reemployment Challenge
- Community Based Training Programs
- Virtual Career Center
- Florida Workforce Dashboard
- Rural Labor Force Decline Study and Response

FY 2017-18
- Future Discretionary Board Priorities and Allocations

*One-year program
**Two-year program