

# Statement of Work (SOW)

## Workforce Board Evaluation

Prepared for CareerSource Florida

March 22, 2022





## Statement of Work:

This Statement of Work, which is effective as of March 22, 2022 (this "SOW"), is made by Ernst & Young LLP ("EY") and CareerSource Florida ("Client"), pursuant to the State of Florida management consulting State Term Contract 80101500-20-1 (the "Agreement").

Except as otherwise set forth in this SOW, this SOW incorporates by reference, and is deemed to be a part of, the Agreement. The additional terms and conditions of this SOW shall apply only to the Services covered by this SOW and not to Services covered by any other Statement of Work pursuant to the Agreement. Capitalized terms used, but not otherwise defined, in this SOW shall have the meanings in the Agreement, and references in the Agreement to "you" or "Client" shall be deemed references to you. In the event of conflict or ambiguity between the terms of this SOW and the terms and conditions set forth in the Agreement, the terms of this SOW shall prevail and take precedence in interpreting the rights and obligations of the parties.

## Scope of Services

EY will provide the following Services (the "Services") to Client:

### *Workforce Board Evaluation*

#### PROJECT SET-UP AND COMMUNICATIONS

The set-up phase of the project will ensure our teams are organized and aligned and will lay the foundation for a successful project.

##### **0.1 Project guidebook, calendar, and information request**

EY will provide CareerSource Florida with a project guidebook detailing the project calendar and requesting background information for planning and facilitation purposes. CareerSource Florida will be provided with draft invitation wording to send to local workforce boards and other stakeholders participating in meetings with us. EY can also share draft language describing our process and desired outcomes that CareerSource can finalize and include in its own communications.

##### **0.2 Facilitation and logistics setup and advising**

EY will provide guidance on timing and logistics to seek initial input from local workforce board executives as well as CareerSource, the REACH office, and other State leaders. We will collaborate with the core CareerSource Florida leadership team to establish a timeline for meetings with the understanding that additional interaction with the boards is intended for future phases of work.

We prefer that stakeholder engagement occurs virtually to both optimize the number of participants (stakeholders and EY) and to ensure an accelerated timeline. We can plan for in-person strategy session(s) with CareerSource, REACH office, and other State leaders as specified in Tallahassee.

##### **0.3 Check-in calls with core team members (2x per month)**

EY will schedule formal check-in calls every two weeks with the CareerSource Florida project team to provide status updates, plan for upcoming meetings, and track progress. We will also provide ongoing



communications via email and individual calls.

EY will also schedule a separate formal coordination call with the REACH office every two weeks to update status and solicit feedback. We will provide ongoing communications to the REACH office as appropriate via email and individual calls.

#### **0.4 Report findings**

EY will provide written status updates to CareerSource and REACH leadership at the end of April 2022 and May 2022 that highlight our progress and upcoming activities. CareerSource may choose to share these monthly updates with, for example, members of the CareerSource Florida Board of Directors, leaders from DEO, and leaders from the local workforce boards.

On June 9, 2022, EY will be available to present its findings to the CareerSource Florida Board of Directors. During that presentation, we will describe our process, share findings, present the future state / desired outcomes descriptions, discuss examples from other states, describe potential next steps, and discuss other items as agreed upon with CareerSource leadership.

### **1. RESEARCH AND BACKGROUND REVIEW**

To begin, EY will conduct research and review background information to help inform the additional steps of our work.

#### **1.1 Request and review background information**

EY will ask CareerSource to share background information that is relevant to this work, and we will review all information provided. For example, this could include past studies and plans, policies and procedures, legislation, news articles, and other information.

#### **1.2 Analyze DEO labor market information**

When the Department of Economic Opportunity's labor market analysis is complete (assuming early April 2022), EY will review the findings and assess data available at the workforce region level. As needed, **we will prepare a summary of data for each region in a clear and concise manner.**

#### **1.3 Review and summarize information on the workforce boards**

In addition to our initial background information and data review, we will request more detailed information on each of the 24 local workforce boards. Information requested could include, but not be limited to the board's organization and governance, partnerships, programs and services offered, processes related to providing and procuring services, performance indicators, data and reports generated by the board itself, branding and communications tools, technology tools, and success stories. **The findings from this review and the DEO labor market information will be drafted into an objective, written summary to serve as reference as the project proceeds.**

### **2. LOCAL WORKFORCE BOARD LEADER LISTENING SESSION AND STAKEHOLDER INPUT**

After reviewing and summarizing information during steps 1.1-1.3, EY will facilitate a **listening session with executives and leaders from the local workforce boards.** During the session, we will ask board leaders to share insights on the strengths and challenges faced by their organizations and their visions



for serving their regions in the future. We will take notes during the sessions and prepare a brief summary of those findings.

In addition, we will facilitate up to 10 30-minute **interviews with state leaders of your choice** to learn about their perspectives on the current and future of Florida's workforce board system.

Finally, if desired, we are available to host a virtual discussion with a group of Florida employers of your choice to learn about their needs and experiences with the workforce board system.

During project set-up, EY will provide CareerSource with guidance on meeting logistics, schedule and invitation language. We will ask CareerSource to coordinate with the local workforce executives to finalize the meeting date and time, send invitations, and provide the virtual platform (e.g., Teams or Zoom) to host the meeting.

### 3. FUTURE STATE WORKSHOPS

EY will engage CareerSource, the REACH office, and others you designate in **two workshop sessions to help define your vision for the desired future state of Florida's workforce board system**. The sessions will encourage creative thinking, helping participants state a vision for the future of serving Floridians and describing the characteristics of a system that could achieve that vision. After the second session, EY will prepare a brief presentation that articulates an ideal future state of Florida's workforce system and services. The characteristics of the future state can serve as objectives when considering updates to the local workforce boards.

### 4. RESEARCH ON OTHER STATE WORKFORCE BOARD UPDATES AND STRUCTURES

EY will explore workforce board systems in other US states. We will review states that have recently made updates to their systems, study the results of those updates, and **prepare three written case studies** with relevant lessons for Florida. This could include lessons of what did – and what did not – work well in those states. Our research will entail phone interviews with representatives from those states to hear firsthand about the process and outcomes.

### 5. FINDINGS REPORT

At the conclusion of the project, we will develop a **report containing our findings** that emerged from the four steps described above. We will offer suggestions regarding the process continuing forward – future phases of work needed to achieve the State's desired timeline for streamlining the local workforce board system. Next steps, from July 2022 through June 2023 and beyond, may include expanding stakeholder engagement, developing change management strategies and tools, exploring potential models to advance Florida toward its desired future state, and adopting technologies to assist with the transition and future workforce board processes.



## Project timeline

The project will commence no later than April 4, 2022, with a final findings report delivered no later than June 30, 2022.

As mentioned above, we anticipate that a majority of stakeholder input, such as meetings with representatives from the workforce boards, will take place virtually. A kickoff meeting with CareerSource, the REACH office, and those you designate as well as the June CareerSource board meeting will take place in person in Tallahassee. Other in person meetings with leadership from CareerSource, Reach, DEO etc. may be accommodated upon request and agreement.

The table below provides a timeline for the project by task. If our approach needs revision, we are happy to discuss. We anticipate payment to be deliverables-based, with deliverables derived from this timeline and agreed upon between the parties.

TIMELINE	Month		
Phase / Task	March/Apr	May	Jun
Project set-up and communications			
0.1 Project guidebook, calendar, and information requests			
0.2 Facilitation and logistics setup and advising			
0.3 Check-in calls with core team members			
0.4 Report findings (monthly updates and board presentation)			
1. Research and background review			
1.1 Request and review background information			
1.2 Analyze DEO labor market information (assuming April release)			
1.3 Review and summarize information on workforce boards			
2. Local workforce board leader listening session and stakeholder input			
3. Future state workshops			
4. Research on other state workforce board updates and structures			
5. Presentation at June CareerSource Board of Directors meeting			
6. Findings report			



## The Team

Listed below are key personnel including project leadership and workstream leads. We will work with CareerSource to determine additional resources within each workstream based on experience as well as fit with your team objectives. The EY team will include the following individuals:

EY TEAM OVERVIEW			
Candidate Name	EY Job Title and Project Role	Education	Years of Experience
Amy Holloway	<ul style="list-style-type: none"><li>➤ Principal Engagement Partner and Team Lead</li></ul>	<ul style="list-style-type: none"><li>➤ BBA, Economics Baylor University</li><li>➤ MS, Environmental Economics Baylor University</li></ul>	25+
Dawn Woods	<ul style="list-style-type: none"><li>➤ Principal Consultant</li><li>➤ Quality Partner</li></ul>	<ul style="list-style-type: none"><li>➤ BS, Management Information Systems, Auburn University</li></ul>	15+
Chris Ward	<ul style="list-style-type: none"><li>➤ Principle Consultant</li><li>➤ Project Advisor</li></ul>	<ul style="list-style-type: none"><li>➤ Ed.M, Human Development and Psychology, Harvard University</li><li>➤ MBA, Corporate Finance, University of Georgia, Terry College of Business</li><li>➤ BBA, Management Sciences, University of Georgia</li></ul>	20+
Clint Fuhrman	<ul style="list-style-type: none"><li>➤ Senior Manager</li><li>➤ Client Engagement</li></ul>	<ul style="list-style-type: none"><li>➤ MS, Health Policy and Administration, Pennsylvania State University</li><li>➤ BS, History and Social Sciences, Florida State University</li></ul>	25+
John Rees	<ul style="list-style-type: none"><li>➤ Senior Manager</li><li>➤ Research Manager</li></ul>	<ul style="list-style-type: none"><li>➤ MS, City and Regional Planning, Georgia Institute of Technology</li><li>➤ BA, Journalism, University of Georgia</li><li>➤ BS, Psychology, University of Georgia</li></ul>	15+
Sarah Gosselin	<ul style="list-style-type: none"><li>➤ Senior Consultant</li><li>➤ Project Coordinator</li></ul>	<ul style="list-style-type: none"><li>➤ MPA, Public Policy and Management, Florida State University</li><li>➤ BA, English and Criminology, Florida State University</li><li>➤ PMP, PMI Institute</li></ul>	5
Jennifer Burrington	<ul style="list-style-type: none"><li>➤ Senior Consultant</li><li>➤ Research Support</li></ul>	<ul style="list-style-type: none"><li>➤ MS, Agricultural and Applied Economics, Texas Tech University</li><li>➤ BS, International Food and Resource Economics, University of Florida</li></ul>	3



<b>AJ Temple</b>	<ul style="list-style-type: none"><li>➤ Consultant</li><li>➤ Project and Stakeholder Engagement Support</li></ul>	<ul style="list-style-type: none"><li>➤ BA, American Government, University of Virginia College of Arts &amp; Sciences</li><li>➤ Master of Public Policy Frank Batten School of Leadership &amp; Public Policy, University of Virginia College of Arts &amp; Sciences</li></ul>	1
<b>AnnMarie Grason</b>	<ul style="list-style-type: none"><li>➤ Consultant</li><li>➤ Research Support</li></ul>	<ul style="list-style-type: none"><li>➤ BBA, Economics, Georgia Southern University Statesboro, GA</li></ul>	3

## Your Obligations

We will ask you to identify participants for the focus groups. You will be responsible for all invitations and meeting logistics. You will lead communications with the larger community (e.g., you will interact with local media or share information at community events).

Subject to EY's retained rights in Materials under Section 21 of the General Terms and Conditions of the Agreement, the deliverable(s) detailed herein shall be treated as work for hire for Client, and, upon full payment in accordance with the General Terms and Conditions of the Agreement and this SOW for such deliverable(s), EY assigns copyright in such deliverable(s) (other than Materials) to Client. EY retains all rights in any Materials or other intellectual property delivered to or accessed by Client under or in connection with this SOW.

## Other Provisions

Client shall assign a qualified person to oversee the Services. Client is responsible for all management decisions relating to the Services and for determining whether the Services are appropriate for its purposes.

EY may retain, disclose and use Client Information that EY collects in connection with any services EY performs for Client for research and thought leadership purposes, as well as for the purpose of providing services to other clients, as long as EY identifies Client only in general terms in connection with such information (e.g., "a large manufacturing company").

CareerSource Florida may not recover from EY, in contract or tort, under statute or otherwise, any consequential, incidental, indirect, punitive or special damages in connection with claims arising out of this SOW or otherwise relating to the Services, including any amount for loss of profit, data or goodwill, whether or not the likelihood of such loss or damage was contemplated.

CareerSource Florida may not recover from EY, in contract or tort, under statute or otherwise, aggregate damages in excess of the fees actually paid for the Services that directly caused the loss in connection with claims arising out of this SOW or otherwise relating to the Services. This limitation will not apply to losses caused by EY's fraud or willful misconduct or to the extent prohibited by applicable law.



CareerSource Florida may not make a claim or bring proceedings relating to the Services or otherwise under this SOW against any other Ernst & Young Firm or any of our members, shareholders, directors, officers, partners, principals or employees ("EY Persons"). CareerSource Florida shall make any claims or bring proceedings relating to the Services only against EY. The provisions of this section are intended to benefit all EY Persons, who shall be entitled to enforce them.

## Contacts

Client has identified Andrew Collins as Client's contact with whom EY should communicate about these Services. Client's leadership contact at EY for these Services will be Amy Holloway. Client's day-to-day contact at EY will be AJ Temple.

## Fees & Deliverables

Client shall pay EY a fee of \$250,000 for the Services.

As the EY team completes the specified deliverables we will issue a status report (format agreed upon by CareerSource) detailing all activities and outputs that were conducted that period as detailed below. EY will submit invoices for payment upon notification of acceptance of the status report by Client, no later than 30 days from delivery of report. Payment is due upon receipt of EY's invoice.

The table below delineates deliverables by invoice period:

Deliverables	Summary of Work	Evidence of Completion	Completion Date	Price
<b>Deliverable #1:</b> Project set-up, begin research and background review	<ul style="list-style-type: none"><li>• <b>Project Management:</b> Project guidebook, milestones calendar, project kickoff, 2 client check in calls</li><li>• <b>Interviews:</b> Information requests, begin information review, input on stakeholder input</li></ul>	<i>Invoice initiated upon acceptance of detailed status report by CS</i>	April 30, 2022	\$60,000
<b>Deliverable #2:</b> Research and background review, stakeholder input, future state workshops, and leading practice research	<ul style="list-style-type: none"><li>• <b>Project Management:</b> 2 formal client check-in meetings</li><li>• <b>Research:</b> Complete background information review, analyze and summarize DEO labor market information, review and summarize information on the workforce boards (begin</li></ul>	<i>Invoice initiated upon acceptance of detailed status report by CS</i>	June 3, 2022	\$120,000



Deliverables	Summary of Work	Evidence of Completion	Completion Date	Price
	draft of summary of regions) <ul style="list-style-type: none"><li>• <b>Interviews:</b> Prepare and host listening sessions and stakeholder input, facilitate 2 future state workshops, and research other state workforce boards</li></ul>			
<b>Deliverable #3:</b> Present at June Board meeting and deliver findings report	<ul style="list-style-type: none"><li>• <b>Presentations:</b> Deliver draft presentation for workforce board for review, incorporate input, travel to and present at June 9 State Board meeting, deliver report containing our research findings</li></ul>	<i>Invoice initiated upon acceptance of Final Report by CS</i>	June 30, 2022	\$70,000
			<b>TOTAL</b>	<b>\$250,000</b>

In witness whereof, the parties have executed this SOW as of the date set forth below.

**AGREED:**

CareerSource Florida

By: 

Name: Andrew Collins

Title: COO / CFO

Ernst & Young LLP

By: Samuel B Hughes

Name: Samuel Hughes

Title: Principal