



Scope of Work:

REACH Act Alignment Phase 2 – Discovery, Research, and Option Development

Prepared for CareerSource Florida
September 1st, 2022



Phase 2 Scope of Work

The following includes our proposed approach to continue assisting CareerSource Florida, the REACH Act office, and other partners with identifying key dynamics of the state's workforce system and exploring options for greater alignment in keeping with the REACH Act and federal Department of Labor (DoL) requirements. Our proposed next phase of work will build from the findings of Phase 1 and will include broader stakeholder engagement and research and analysis of both quantitative and qualitative inputs. The findings resulting from these activities will be utilized to create a report including possible options for local workforce development board consolidation and alignment for the CareerSource Florida Board of Directors to consider.

EY anticipates that Phase 2 will begin on September 1st, 2022 and will be completed by February 28, 2023.

1. Project Management Workstream

EY will provide a set of kick-off materials and establish communication channels to ensure our teams are organized and to lay the foundation for the successful future alignment of Florida's workforce development system.

1.1 Project Set-up

EY will collaborate with CareerSource Florida and any other relevant stakeholder partners to conduct project set-up. Project set-up is inclusive of but not limited to a project kickoff meeting, a file sharing process, information requests, and a Project Management Plan and Guidebook.

a. Project Kick-Off Meeting

EY will schedule and facilitate a project kickoff meeting on September 6th, 2022. EY will prepare materials and will coordinate with CareerSource Florida to determine the attendee list for the kickoff meeting. This meeting will occur virtually.

b. Information Request (*work product*)

EY will provide CareerSource Florida with a detailed request for additional information not received during Phase 1 but helpful to the Phase 2 process.

c. Project Management Plan and Guidebook (*key deliverable*)

The Project Management Plan and Guidebook will include a high-level work plan, deliverable review and acceptance process and criteria, project schedule, team information and contacts, any additional information requests, an internal communications calendar, and other standard project management processes. The Project Management Plan and Guidebook will include a CareerSource Florida writing style guide agreed upon by both parties. EY will provide the Project Management Plan and Guidebook in addition to other relevant project set-up materials within one month of the contracted start date.

d. Stakeholder Engagement Playbook / Toolkit (*key deliverable*)

EY will provide guidance for identifying participants and organizing stakeholder engagement which will be outlined in a Stakeholder Engagement Playbook / Toolkit. The Stakeholder Engagement Playbook / Toolkit will list identified facilitation tools and potential technology as well as guidance for any other facilitation materials needed, as directed by CareerSource Florida. EY will use consistent tools for facilitating input from the identified stakeholders



including presentations, questions, and formats for documenting feedback so that input is consistently formatted and more easily aggregated across all stakeholder groups. EY will work closely with CareerSource Florida to identify the most efficient strategy for implementing the in-person stakeholder engagement portions of the scope of work. EY will dedicate a team of at least two EY consultants to each in-person meeting. CareerSource Florida will be responsible for identifying and providing contact information for meeting participants, securing meeting locations, AV equipment, meals and refreshments, and other meeting support logistics for in-person meetings.

- **Stakeholder Engagement Calendar**
The Stakeholder Engagement Playbook / Toolkit will include a formal Stakeholder Engagement Calendar. The Stakeholder Engagement Calendar will outline the stakeholder engagement activities, including attendees and dates. The Stakeholder Engagement Calendar will be updated as necessary throughout the engagement.

1.2 Project Communications

a. **Weekly Core Engagement Team Meetings**

EY will schedule formal check-in calls once a week with a core team of CareerSource Florida, REACH Act office and other designated representatives to provide status updates, plan for upcoming meetings, and track progress. EY will also provide ongoing communications via email and individual calls as needed for the project. Weekly Core Engagement Team meetings will begin the week following the project kickoff meeting.

b. **Presentations to CareerSource Florida Board of Directors**

EY will present updates at the September CareerSource Florida Board of Directors meeting and the December CareerSource Florida Board of Directors meeting as directed by CareerSource Florida.

1.3 Ongoing Project Support Activities

EY will provide ongoing project support and consultation throughout the length of the engagement as directed by CareerSource Florida.

a. **Monthly Progress Reports** (*key deliverables*)

EY will provide written status updates to CareerSource Florida and REACH Act office leadership at the end of each month, from September 2022 to February 2023, that highlight project status, activities to date, and upcoming activities. Monthly progress reports will be delivered to CareerSource Florida leadership as a PDF document via email.

b. **Deliverable Expectation Documents**

EY will provide written Deliverable Expectation Documents for key deliverables prior to the drafting and execution of the deliverable. Each Deliverable Expectation Document will include a high-level description of the work product/deliverable, a draft table of contents for the report, a brief summary of the intended content, a list of review and approval expectations, deliverable acceptance criteria, and an expected schedule.

c. **Stakeholder Identification**

CareerSource Florida is responsible for identifying stakeholders of its choice to participate in stakeholder input sessions, as well as providing their contact information. EY will provide guidance on the types of organizations and individuals to include.



d. Facilitation and Logistics Set-up and Advising

EY will collaborate with CareerSource Florida to facilitate project management activities and assist with overall engagement and project logistics and set-up. The project team will establish a timeline for stakeholder engagement to take place across the state and will provide guidance on meeting logistics. CareerSource Florida will be responsible for identifying and securing meeting locations, AV, meals and refreshments, and other meeting support logistics for in-person meetings.

2. Background Research and Analysis

EY will conduct research and analysis to provide a quantitative basis for option development and to support and inform qualitative inputs. The research components will include statewide data collection and analysis related to Workforce Innovation and Opportunity (WIOA) Act and REACH Act requirements, as well as cataloguing and identification of current operational and organizational features of the local workforce development boards.

2.1 Statewide Data Collection and Analysis

This research will include review and analysis of pertinent data, including information related to WIOA requirements; goals included within the REACH Act related to local workforce development board consolidation; the Florida Department of Economic Opportunity Local Workforce Development Area Designation Analysis and Organizational Boundary Scenarios report; and the Florida Department of Education’s Adult Education Delivery System Evaluation. The table below details these areas of focus.

Factors	Mandated	Legislation
Consistent with local labor market areas*	Yes	WIOA
Common economic development area*	Yes	WIOA
Appropriate education and training institutions to administer activities under WIOA subtitle B*	Yes	WIOA
Population centers	No	WIOA
Commuting patterns	No	WIOA
Land ownership	No	WIOA
Industrial composition	No	WIOA
Location quotients	No	WIOA
Labor force conditions	No	WIOA
Geographic boundaries	No	WIOA
Metropolitan Statistical Areas (MSAs)	N/A	Requested by CareerSource Florida
Demographic composition (age, race) by county/local workforce development board	N/A	Requested by CareerSource Florida
Eliminate multiple layers of administrative entities to improve coordination of the workforce development system	Yes	REACH



Establish consistent eligibility standards across the state to improve the accountability of workforce related programs	Yes	REACH
Provide greater flexibility in allocating resources to maximize the funds directed to training and business services	Yes	REACH
Florida Department of Economic Opportunity Local Workforce Development Area Designation Analysis and Organizational Boundary Scenarios	N/A	N/A
Florida Department of Education’s Adult Education Delivery System Evaluation	N/A	N/A

*Language taken directly from WIOA legislation

2.2 Organizational and Operational Research

The table below captures organizational and operational items that EY will research and compile related to the local workforce development boards. This information will be gathered through a Request for Information distributed to each of the local workforce development boards with the assistance of CareerSource Florida. The Request for Information will be part of the project plan.

Operational Research Considerations	Source
Active lease terms and properties	Local Workforce Development Boards
Case management and CRM tools	Local Workforce Development Boards
Organizational structure	Local Workforce Development Boards

2.3 Background Research and Analysis Report (key deliverable)

EY will develop a research report that summarizes findings from the Statewide Data Collection and Analysis and the Organizational and Operational Research.

3. Local and State Stakeholder Engagement

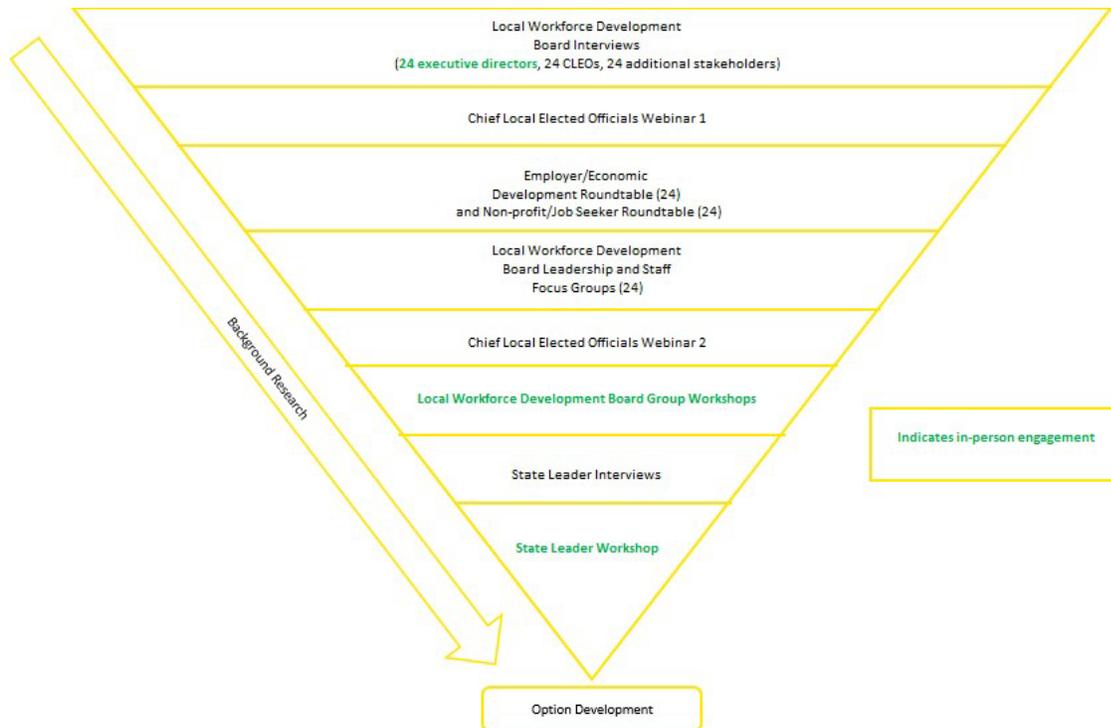
Phase 2 Stakeholder Engagement will seek to collect input and information from each local workforce development board, other local representatives including employers and those representing job seekers, and state leaders on opportunities to improve overall Florida workforce development system alignment. This phase of engagement will draw from the findings of Phase 1 and the background research and analysis conducted in Phase 2 to drive towards specific inputs to option development. EY will designate EY team members to each local workforce development area to engage stakeholders and understand the current state of the local workforce environment, including current pain points in the customer experience and potential opportunities for improvement. The engagement sessions will also focus on data analysis topics informing local workforce development area options (current labor markets, economic development areas, commuting patterns, poverty areas, etc.) to fill in any blanks with a local perspective. These sessions will expand upon initial stakeholder input in Phase 1 through conducting an in-depth focus on local perspectives and increasing opportunities for local workforce development boards and local representatives to contribute and provide input.



Stakeholder engagement activities will include the facilitation of the following interviews and group sessions. Additional detail on each is provided in the pages that follow.

- **Local Workforce Development Board Engagement**
 - Local Engagement Kick-Off Call (virtual)
 - CEO / Local Board Executive Director Interviews (24) (in person at the Florida Workforce Development Association’s Professional Development Summit and virtually for those who are unable to meet during the Summit)
 - Chief Local Elected Officials Interviews (24) (virtual)
 - Additional Local Interviews (24) (virtual)
 - Statewide CLEO Webinars (2) (virtual)
 - Local/Regional Employer and Regional Economic Development Roundtables (24) (virtual)
 - Relevant Local/Regional Non-Profits and Job Seeker Representatives Roundtables (24) (virtual)
 - Local Workforce Development Board Leader and Staff Focus Groups (24) (virtual)
 - Local In-Person Group Workshops by Geographic Region (6-7 depending on local workforce development board groupings) (in-person)
- **State Workforce Development System Interviews**
 - CareerSource Florida Interviews (5) (virtual)
 - Other State Stakeholder Interviews (3) (virtual)
- **State Leader Workshop**
 - Future State (1) (in-person)

The following graphic represents the progression of stakeholder engagement, working towards the goal of option development. Please note that all meetings will be conducted virtually unless denoted as “in-person.”



In addition to the aforementioned engagement activities, if desired, EY will work with CareerSource Florida to draft a questionnaire that can be made available to anyone else who wants to share their perspectives with the consulting team.

3.1 Local Workforce Development Board Engagement

EY will conduct interviews with local workforce development board leaders and local stakeholders as identified to hear their insights on workforce development system alignment needs and opportunities. In addition to interviewing the local workforce development board CEO and Chief Local Elected Officials, EY will conduct an additional one-on-one interview with an individual of the board’s choice. It is expected that CareerSource Florida and the local workforce development board identify those participants and issue the invitation to meet with us at least two weeks in advance of the session or interview. EY will work with CareerSource Florida and its communications team to develop resources and tools to assist with those meetings, for example: draft meeting invitation language, draft written copy for introduction and about the project wording, feedback on outreach plans, and a draft template for taking notes and documenting input.

a. Local Engagement Kick-Off Call

At the commencement of Phase 2, EY will host a call or webinar including a brief presentation and overview of the planned stakeholder engagement and analysis to occur throughout the study period. CareerSource Florida can invite any partners or stakeholders they choose to participate in the call. The session will be conducted virtually.

b. Local Workforce Development Board One-on-One Interviews

EY will conduct up to 72 interviews, three for each of the 24 local workforce development



boards. EY will work with CareerSource Florida to schedule and communicate with each local workforce development board to prepare for each interview. It is anticipated these interviews will include the following for each region:

- CEO / local board executive director interviews
- Chief local elected officials (CLEO) interviews
- Additional local Interview as directed by the local workforce development board

EY will work with CareerSource Florida to schedule the 24 CEO interviews in-person during the Florida Workforce Development Association's Professional Development Summit the week of September 12th, 2022. Any CEO interviews not conducted that week will be conducted virtually. CareerSource Florida will be responsible for identifying and securing meeting locations, AV equipment, meals and refreshments, and other meeting support logistics for these in-person meetings.

c. Local Roundtables

- **Local/Regional Employer and Economic Development Leader Roundtables:** EY will virtually conduct one employer roundtable session in each local workforce development area that includes representatives knowledgeable of the board's services and who have experience interacting with the local workforce development board. These sessions will focus on employer needs (current and anticipated) and opportunities for system improvements. These sessions will also include representatives from the area's economic development organization(s). Each session will last approximately 1 hour and will include 10-15 participants. EY anticipates that participants will be identified by CareerSource Florida and the local workforce development board and CareerSource Florida will issue invitations at least two weeks in advance of the session.
- **Relevant Local/Regional Non-Profits and Job Seeker Representatives Roundtables:** EY will also virtually conduct one roundtable discussion in each local workforce development area with individuals who can provide perspective on the job seeker experience interacting with the local workforce development board and system. This might include local non-profit organizations that support individuals in need of employment, upskilling, or wraparound services. Each session will last approximately 1 hour and will include 10-15 participants. EY anticipates that participants will be identified by CareerSource Florida and the local workforce development board and CareerSource Florida will issue invitations at least two weeks in advance of the session.

d. Local Workforce Development Board Leadership and Staff Focus Groups

EY will facilitate a 1-hour workshops with leadership of each of the 24 local workforce development boards. These sessions will encourage candid and thoughtful input from local workforce development board leaders and key staff on current state successes, challenges, and opportunities. The conversations will also solicit perspectives regarding the ideal future state of the workforce development system, along with what qualities and goals must be considered when developing considerations for workforce board alignment. EY will share key themes from stakeholder engagement and solicit feedback from participants on those themes. It is expected that CareerSource Florida and the local workforce development board identify participants and issue invitations at least two weeks in advance of the session.



e. Chief Local Elected Officials (CLEOs) Informative Webinars

In addition to conducting one-on-one interviews with CLEOs, EY will participate in up to two webinars with CLEOs to share information about this alignment process. EY will participate in and assist CareerSource Florida with facilitating up to two webinars, organized by CareerSource Florida, with CLEOs from across the state.

3.2 State-Level Workforce Development System Stakeholder Engagement

EY will conduct interviews with state-level workforce development leaders as identified by CareerSource Florida to hear their insights on workforce board alignment needs and opportunities. These stakeholders may include, for example, individuals from CareerSource Florida, the REACH Act Office, WIOA partners, state economic development leaders, and/or others of CareerSource Florida's choice. These sessions will build on the information gathered in Phase 1 and are intended to help synthesize inputs previously received, refine assumptions, and support option development.

a. State Leader Interviews

EY will conduct up to eight one-on-one interviews with state-level leaders to solicit guidance on current state, potential future state, goal development, and overall potential workforce alignment. EY will offer guidance to CareerSource Florida to help identify state leaders for inclusion in interviews.

3.3 Stakeholder Engagement Summary Report (key deliverable)

Upon completion of both local and state level stakeholder engagement, EY will prepare a Stakeholder Engagement Summary Report to aggregate major themes from throughout the entire engagement process. The report will be utilized with the Background Research and Analysis Report as an inputs to option development and to inform the Future State Options Report.

4. Future State Strategy Development

Following background research and analysis and stakeholder engagement, EY will engage local and state leaders in a final future state development process, leading to the formulation of three options for consideration by the CareerSource Florida Board of Directors.

4.1 Local and State Leader Future State Workshops

a. Local Workforce Development Board Workshops by Geographic Grouping

Upon the completion of the local workforce development board leader focus groups, EY will host up to eight in-person engagement sessions with staff and leaders representing each of the local workforce development boards grouped by geographic proximity. These sessions will be three hours long and will focus on the future of the workforce development system, including options for greater alignment and consolidation. These sessions will have a virtual option for those participants who are unable to join in-person.

b. State Leader Workshop

EY will also conduct an in-person State Leader Workshop with participants identified by CareerSource Florida. This workshop will include a summary of all to-date findings, synthesized



into key themes and considerations for consolidating and aligning the local workforce development boards and system. During the session, EY will ask participants to provide input to the selection of the three options that will be presented to the CareerSource Florida Board of Directors meeting in February 2023.

4.2 Option Development and Future State Options Report

EY will develop three potential options for action to be considered by the CareerSource Florida Board of Directors. These options will be developed in coordination with CareerSource Florida staff and the REACH Act office, and will focus on federal WIOA requirements, REACH Act priorities, stakeholder input, and research from Phases 1 and 2. The options will be included in the Final Project Report and in a PowerPoint presentation to be delivered at the February 2023 - CareerSource Florida Board of Directors meeting. Information in the option descriptions will include:

- Maps of potential new local workforce development area geographies
- WIOA and REACH Act compliance factors
- High-level change management considerations
- Benefits and risks

5. Final Report

5.1 Future State Options Board Presentation (*key deliverable*)

The Future State Options Presentation will be presented to the CareerSource Florida Board of Directors at the February 2023 Board meeting. It will include descriptions of each option as described in 4.2 and relevant background information.

5.2 Final Summary Report (*key deliverable*)

EY will develop a written summary of findings and suggestions that will incorporate all aspects of the identified scope of work, including the Background Research and Analysis Report, the Stakeholder Engagement Summary Report, and the Future State Options Report. The final report will be addressed to CareerSource Florida for the purposes of evaluating options related to the REACH Act. The final report will be delivered to CareerSource Florida prior to the February 2023 Board of Directors meeting.



Project Timeline

The following table provides a timeline for the project by task.

TIMELINE	Phase / Task	Month					
		Sep	Oct	Nov	Dec	Jan	Feb
Project Management Workstream							
1.1	Project Set-Up						
1.2	Project Communications						
1.3	Ongoing Project Support Activities						
Background Research and Analysis							
2.1	Statewide Data Collection and Analysis						
2.2	Organizational and Operational Research						
2.3	Background Research and Analysis Report						
Stakeholder Engagement Workstream							
3.1	Local Workforce Development Board Engagement						
3.2	State Level Workforce Development System Stakeholder Engagement						
3.3	Stakeholder Engagement Summary Report						
Future State Strategy Development							
4.1	Local and State Leader Future State Workshops						
4.2	Option Development and Future State Options Report						
Final Report							
5.1	Future State Options Board Presentation						
5.1	Final Summary Report						



The Team

Listed below are key personnel including project leadership and workstream leads. EY will incorporate additional resources within each workstream based on experience as needed to complete project activities. The team of key personnel that led Phase 1 of CareerSource Florida’s Workforce Board Alignment Evaluation brings an understanding of Florida’s workforce development system, REACH Act priorities, WIOA priorities, and other factors relevant to this Phase 2 scope. EY’s Economic Development Advisory Services team is experienced in strategic planning, stakeholder engagement, and analysis. EY’s People Advisory Services team is skilled in the fields of organizational and workforce transformation with a focus on humans at the center of change. Several leaders on the project team were engaged with Tennessee Department of Labor and Workforce Development’s recent system changes, including improvements to the customer experience. EY will also dedicate Florida account executives responsible for monitoring quality and client satisfaction throughout the life cycle of the project.

EY key personnel will include the following individuals:

Candidate Name	EY Job Title and Project Role	Education	Years of Experience
Amy Holloway	<ul style="list-style-type: none"> ➤ Principal Consultant ➤ Engagement Partner and Team Lead ➤ Workstream Lead 	<ul style="list-style-type: none"> ➤ BBA, Economics Baylor University ➤ MS, Environmental Economics Baylor University 	25+
Dawn Woods	<ul style="list-style-type: none"> ➤ Principal Consultant ➤ Quality Partner 	<ul style="list-style-type: none"> ➤ BS, Management Information Systems, Auburn University 	15+
Chris Ward	<ul style="list-style-type: none"> ➤ Principal Consultant ➤ Project Advisor ➤ Workstream Lead 	<ul style="list-style-type: none"> ➤ Ed.M., Human Development and Psychology, Harvard University ➤ MBA, Corporate Finance, University of Georgia, Terry College of Business ➤ BBA, Management Sciences, University of Georgia 	20+
Clint Fuhrman	<ul style="list-style-type: none"> ➤ Senior Manager ➤ Client Engagement Lead ➤ Workstream Lead 	<ul style="list-style-type: none"> ➤ MS, Health Policy and Administration, Pennsylvania State University ➤ BS, History and Social Sciences, Florida State University 	20+
Chris Gianutsos	<ul style="list-style-type: none"> ➤ Principal Consultant ➤ Subject Matter Expert 	<ul style="list-style-type: none"> ➤ MBA, Columbia University ➤ BS, University of Connecticut 	20+
Jung Kim	<ul style="list-style-type: none"> ➤ Manager ➤ Research Manager 	<ul style="list-style-type: none"> ➤ MS, Regional and Urban Planning, London School of Economics ➤ BA, Sociology and Urban Studies, Northwestern University 	15+



Geri Lopez	<ul style="list-style-type: none">➤ Manager➤ Stakeholder Engagement Manager	<ul style="list-style-type: none">➤ MS, City Planning, Massachusetts Institute of Technology➤ BA, Architecture, Yale University	20+
Sarah Gosselin	<ul style="list-style-type: none">➤ Senior Consultant➤ Project Manager	<ul style="list-style-type: none">➤ MPA, Public Policy and Management, Florida State University➤ BA, English and Criminology, Florida State University➤ PMP, PMI Institute	5
AJ Temple	<ul style="list-style-type: none">➤ Consultant➤ Project and Stakeholder Engagement Support	<ul style="list-style-type: none">➤ BA, American Government, University of Virginia College of Arts & Sciences➤ Master of Public Policy Frank Batten School of Leadership & Public Policy, University of Virginia	1