

**Board of Directors Meeting Agenda**  
SEPT. 19, 2023 • 8:30 – 11 A.M. ET  
ROSEN SHINGLE CREEK  
9939 UNIVERSAL BLVD., ORLANDO  
MEETING ROOM: GATLIN B

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**Chair's Welcome and Remarks**

***Stephanie Smith***

**Hurricane Idalia Response**

***Adrienne Johnston***

**Consent Agenda**

1. June 7, 2023, Meeting Minutes
2. Approval of Appointee to Florida Credentials Review Committee
3. Approval of Lindsay Volpe to serve as FloridaCommerce Designee
4. Request for Designation as Direct Provider of Workforce Services
5. Request to Serve as One-Stop Operator
6. Request for Extension to Serve as One-Stop Operator
7. Workforce Innovation and Opportunity Act (WIOA) Local Workforce Development Board Two-Year Plan Modification
8. Approval of Master Credentials List for Delivery to State Board of Education

**President's Report**

***Adrienne Johnston***

**Florida Workforce System Transformation Update**

***Brian Woods***  
*Managing Director, EY*  
***Janeth Merchan***  
*Senior Manager, EY*

**Finance Council Report**

***Bill Johnson***  
*Chair*

**Strategic Policy and Performance Council Report**

***Dan McGrew***

**Action Items**

1. Regional Planning Area Strategic Policy
  2. Education Industry Consortium Strategic Policy
  3. Eligible Training Provider List Administrative Policy
- Keantha Moore***  
*Deputy Chief, Bureau of One-Stop and Program Support, FloridaCommerce*

**Pillar II, System-wide Improvements: Statewide Procurement Strategy**

***Dan McGrew***

**FloridaCommerce Report**

***Lindsay Volpe***  
*Deputy Secretary, Division of Workforce Services*

collaborate.  
innovate.  
lead.



**Local Partners Report**

**Marcus McBride, Ph.D.**  
*President, Florida Workforce Development Association  
CEO, CareerSource Escarosa*

**Open Discussion/Public Comment**

**Chair's Closing Remarks**

**Stephanie Smith**

**UPCOMING MEETINGS**

Executive Committee – Oct. 12, Virtual  
Board of Directors and Council Meetings – Dec. 11-12, Virtual

**Information Items**

**Consent Item 1**

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

# Consent Item 1

## June 7, 2023, MEETING 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 accounts and shall keep minutes on the proceedings of the board of directors.

### FOR CONSIDERATION

- **Approval of June 7, 2023, Meeting Minutes, to include any modifications or changes noted by the board.**

**CareerSource Florida  
Board of Directors Meeting Minutes  
June 7, 2023**

**I. Call to Order**

Chair Stephanie Smith called the meeting to order at 9 a.m. on June 7, 2023. She introduced board member and Veterans Florida Executive Director Joe Marino and invited him to lead the Pledge of Allegiance.

**II. Roll Call**

Chair Johnson introduced Executive Assistant Kay Clement and invited her to conduct a roll call. The following members were present:

Stephanie Smith  
John Adams  
Abe Alangadan  
Jennifer O’Flannery Anderson  
Kiley Damone  
Robert Doyle  
Sophia Eccleston  
Eric Hall  
Shevaun Harris  
Tim Hinson  
Meredith Ivey  
Bill Johnson  
Allison Kinney  
Joe Marino  
Kevin McDonald  
Brent McNeal  
Rep. Lauren Melo  
Kevin O’Farrell  
Commissioner Mel Ponder  
Kimberly Richey  
Laurie Sallarulo  
Patsy Sanchez  
Les Sims  
Meredith Stanfield  
Emmanuel Tormes  
Rep. Dana Trabulsy

**III. Consent Agenda**

Chair Smith introduced Florida Department of Education Chancellor Kimberly Richey, Commissioner Manny Diaz designee, and invited her to share a brief introduction. Richey introduced herself, noting her background in law, state and federal government.

Chair Smith said board members had a rewarding day at the board field experience, hosted by Lively Technical College, which allowed members of the board to see firsthand the partnership between Florida’s education and workforce systems. She gave a special thanks to CareerSource Capital Region for helping to coordinate the opportunity.



Chair Smith gave a recap of the previous Board of Director's meeting and presented the consent agenda.

1. Feb. 23, 2023, Meeting Minutes
2. Approval of Master Credentials List for Delivery to State Board of Education
3. Sunset Reobligation and Deobligation of Temporary Assistance for Needy Families (TANF) Funds Strategic Policy
4. Workforce Innovation and Opportunity Act (WIOA) Local Workforce Development Board Two-Year Plan Modifications
5. Local Workforce Development Board Requests to Serve as One-Stop Operator
6. Local Workforce Development Board Requests for Designation as Direct Service Provider
7. Appointment of Lindsay Volpe to the Florida Credentials Review Committee
8. Appointment of Kimberly Richey to serve as Department of Education Designee

Chair Smith called for a vote to approve the consent agenda.

**Motion:** Eric Hall

**Second:** Mel Ponder

The Consent Agenda passed unanimously.

#### **IV. President's Report**

CareerSource Florida President and CEO Adrienne Johnston shared legislative updates and highlights, noting Governor DeSantis' signing of Senate Bill 240, which expands workforce education programs and increases access to career and technical education programs. The bill also expands the Reimagining Education and Career Help (REACH) office's role to facilitate the development and expansion of apprenticeships, preapprenticeships and other work-based learning. It also requires the Able Trust to report on systems in the state that provide services to persons with disabilities.

Johnston invited Rep. Lauren Melo, chair of the House Postsecondary Education & Workforce Subcommittee, to speak about the valuable and important work that will result from SB 240. Rep. Melo shared an update.

Johnston presented the Florida Workforce System Transformation Plan, consistent expectations for implementation of the state REACH Act, saying the plan will continue to be CareerSource Florida's priority in this next fiscal year. Johnston ended her report with updates on CareerSource Florida's recent collaborative work with partners including local workforce development boards.

#### **V. Strategic Policy and Performance Council Report**

Strategic Policy and Performance Council Chair Sophia Eccleston reported on the discussion during yesterday's meeting. The council heard from members of the CareerSource Florida Business and Workforce Strategies team on a variety of initiatives and received a statewide labor market and program performance update from Florida Department of Economic Opportunity staff.

#### **VI. Action Items**

CareerSource Florida Business and Workforce Strategies Senior Vice President Dan McGrew presented Action Items 1 through 5.

**1. Local Workforce Development Board Composition and Certification**

Chair Smith called for a vote to approve the action item.

**Motion:** Sophia Eccleston

**Second:** Laurie Sallarulo

The action item passed unanimously.

**2. Local Workforce Development Areas Subsequent Designation**

Chair Smith called for a vote to approve the action item.

**Motion:** John Adams

**Second:** Robert Doyle

The action item passed unanimously.

**3. Revision to Certification of Local Workforce Development Areas and Local Workforce Development Boards Strategic Policy**

Chair Smith called for a vote to approve the action item.

**Motion:** Patsy Sanchez

**Second:** Eric Hall

The action item passed unanimously.

**4. Board Governance and Leadership Strategic Policy Revision**

Chair Smith called for a vote to approve the action item.

**Motion:** Allison Kinney

**Second:** John Adams

The action item passed unanimously.

**5. Florida Career Ladder Identifier and Financial Forecaster (CLIFF) Strategic Policy**

Chair Smith called for a vote to approve the action item.

**Motion:** Robert Doyle

**Second:** Patsy Sanchez

The action item passed unanimously.

**VII. Finance Council Report**

Finance Council Chair Bill Johnson shared an update on yesterday's meeting. After receiving an update on the Florida Workforce System Transformation Plan, CareerSource Florida Accounting Director Josh Booth shared an overview of

CareerSource Florida financial operations. The council also received feedback from local workforce development board leaders on Individual Training Account waivers after CareerSource Florida Chief Operating and Financial Officer Andrew Collins and Florida Department of Economic Opportunity Chief Financial Officer Allyce Moriak presented the Action Items.

**VIII. Action Items**

CareerSource Florida Chief Operating and Financial Officer Andrew Collins presented Action Items 6 and 7.

**6. Recapture and Reallocation of Workforce Innovation and Opportunity Act (WIOA) Funds Strategic Policy Revision**

Chair Smith called for a vote to approve the action item.

**Motion:** Sophia Eccleston

**Second:** Kevin McDonald

The action item passed unanimously.

**7. Fiscal Year 2023-2024 CareerSource Florida Network Funding**

Chair Smith called for a vote to approve the action item.

**Motion:** Emanuel Tormes

**Second:** Kevin O'Farrell

The action item passed unanimously.

**IX. Hope Florida – A Pathway to Prosperity Initiative**

Florida Department of Children and Families Secretary Shevaun Harris explained that while the department is primarily known for its work in child safety and protection, staff often encounter families who are struggling and require assistance accessing services to get back on track.

The Hope Florida – A Pathway to Prosperity initiative, spearheaded by First Lady Casey DeSantis, aims to address barriers such as childcare, transportation, food and housing instability, underemployment, and unemployment through government collaboration and partnerships. To date, 50 percent of Hope Florida participants on public assistance benefits have successfully reduced or eliminated their reliance on those programs.

**X. Florida Department of Economic Opportunity Update**

Florida Department of Economic Opportunity Acting Secretary Meredith Ivey presented an update on House Bill 5, which renames the Florida Department of Economic Opportunity as the Department of Commerce. She also announced the Governor's Deputy Chief of Staff, Alex Kelly, has been named the Florida Department of Economic Opportunity's secretary.

Ivey shared a list of grant awards provided to Florida businesses, counties and communities under Governor Ron DeSantis' and legislative leadership. She also said DEO continues to work closely with the REACH Office, CareerSource Florida, Department of Children and Families and Department of Education to implement various requirements of the REACH Act.

The U.S. Department of Labor approved the two waivers submitted by DEO earlier this year for Workforce Innovation and Opportunity Act youth programs.

#### **XI. Local Partners Report**

Florida Workforce Development Association (FWDA) President and CareerSource Polk President and CEO Stacy Campbell-Domineck gave her final presentation as FWDA president on behalf of Florida's 24 local workforce development boards. CareerSource Escarosa Chief Executive Officer Marcus McBride, Ph.D., is her successor.

#### **XII. Open Discussion/Public Comment**

Chair Smith asked if any board members or members of the public wished to comment on board business or other topics.

Board member Patsy Sanchez expressed gratitude for yesterday's board field experience.

Board member Laurie Sallarulo said she would like to learn more about the marketing and communications strategies in place to attract job seekers and businesses. Johnston referred to the statewide outreach line item in the agenda packet and highlighted the Cooperative Outreach program, led by CareerSource Florida Communications and Board Relations Senior Director Victoria Heller, which provides outreach support to assist local workforce development boards in raising awareness and use of job seeker and business services available locally.

#### **XIII. Chair's Closing Remarks**

Chair Smith reminded the board of the Chair's Challenge to visit their local workforce development board for a tour and announced upcoming September board and council meetings. She adjourned the meeting at 11:43 a.m.

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Consent Item 2**

### **CAREERSOURCE FLORIDA BOARD APPOINTMENT OF FLORIDA CREDENTIALS REVIEW COMMITTEE MEMBER**

The Reimagining Education and Career Help (REACH) Act, which amends Chapter 445.004, Florida Statutes, addresses the evolving needs of Florida's economy by increasing collaboration and cooperation among state businesses and education communities while improving training within and access to a more integrated workforce and education system for all Floridians.

Pursuant to Chapter 445.004(4)(h)(1), the state workforce development board shall appoint a Florida Credentials Review Committee to identify nondegree credentials and degree credentials of value for approval by the state workforce development board and inclusion in a Master Credentials List. Such credentials must include registered apprenticeship programs, industry certifications, licenses, advanced technical certificates, college credit certificates, career certificates, applied technology diplomas, associate degrees, baccalaureate degrees and graduate degrees.

The membership of the Credentials Review Committee is designated by statute. The CareerSource Florida Executive Committee solicited nominees to fill a vacancy on the Credentials Review Committee. Mary Jane Brecklin is system vice president of human resource operations for Health First, Florida's only fully integrated delivery network and not-for-profit healthcare system. Brecklin's experience and expertise make her an ideal appointee to fill this vacancy.

Members of the Credentials Review Committee shall serve for a period determined by the chair and the CareerSource Florida Executive Committee. The CareerSource Florida team recommends consideration of a term of two years. Qualified members of the Credentials Review Committee may be reappointed by the chair and the CareerSource Florida Executive Committee.

The Credentials Review Committee acts as an advisory committee or similar group created by the state workforce development board.

## **FOR CONSIDERATION**

- **Approve and appoint Mary Jane Brecklin to fill an existing vacancy on the Credentials Review Committee for a period of no more than two years.**

## **ATTACHMENTS**

- **Mary Jane Brecklin Bio**

# Florida Credentials Review Committee

## Appointee Bio

### Mary Jane Brecklin

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Mary Jane (MJ) Brecklin is system vice president of human resource operations for Health First, Florida's only fully integrated delivery network and not-for-profit healthcare system. In her tenure with Health First, Brecklin has been responsible for leadership and direction of human resources operations, including recruitment and workforce planning, staffing services, compensation, benefits, employee services and human resources information systems.

Brecklin holds a bachelor's degree in nursing from St. Louis University and a master's degree in health services from Webster University. She worked in a number of nursing roles, including nursing leadership, prior to transitioning into human resources.

Today, leading talent and connecting with customers remains her passion. She is ever in pursuit of how to achieve the best experiences and outcomes.

**Consent Item 3**

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Consent Item 3**

### **APPOINTMENT OF DESIGNEE TO SERVE IN PLACE OF APPOINTED BOARD MEMBER**

Pursuant to Section 445.004(3)(a), Florida Statutes, and Public Law No. 113-128, Title I, Section 101(b), Florida Department of Commerce Secretary J. Alex Kelly serves as a member of the CareerSource Florida Board of Directors.

Pursuant to the CareerSource Florida Bylaws, s. 4.17, Secretary Kelly designates FloridaCommerce Division of Workforce Services Deputy Secretary Lindsay Volpe to serve in his absence, subject to the board's approval.

### **FOR CONSIDERATION**

- **Approval of FloridaCommerce Secretary J. Alex Kelly's request to appoint Deputy Secretary Lindsay Volpe as the FloridaCommerce designee to serve in his absence on the CareerSource Florida Board of Directors, contingent upon any additional information or approval signatures required.**



August 10, 2023

Stephanie Smith, Chairman  
CareerSource Florida  
P.O. Box 13179  
Tallahassee, FL 32317

Re: Designation of CareerSource Florida Board Member

Dear Chairman Smith,

Section 445.004(3)(d), Florida Statutes, provides that the Secretary of the Florida Department of Commerce, or a designee, serves as a member of the CareerSource Florida Board of Directors. I am hereby designating Lindsay Volpe, Deputy Secretary of the Division of Workforce Services, to serve in my place on the CareerSource Florida Board of Directors, effective August 10, 2023.

If you have any questions concerning this matter, please contact me at (850) 245-7298.

Sincerely,

J. Alex Kelly  
Secretary



# Board Designee Bio

## Lindsay Volpe

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Lindsay Volpe is the deputy secretary of workforce services at FloridaCommerce. Volpe held several leadership positions at the department's predecessor, the Florida Department of Economic Opportunity, including deputy bureau chief of the Reemployment Assistance Program and director of economic accountability and transparency. Volpe has also served in various leadership roles at the Department of Children and Families to help drive the agency's transformation toward supporting Floridians' economic self-sufficiency through care coordination.

Prior to joining the state of Florida, Lindsay worked in economic development for two Florida counties for nearly 10 years, including launching a new economic development office in Leon County. She and her husband, Robert, reside in Tallahassee.

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Consent Item 4**

### **REQUEST FOR DESIGNATION AS DIRECT PROVIDER OF WORKFORCE SERVICES**

The Workforce Innovation and Opportunity Act allows local workforce development boards to serve as direct providers of basic and individualized career services with the agreement of the chief elected official in the local area, the local workforce development board and the Governor. Section 445.007(6), Florida Statutes, allows for local workforce development boards to be designated as direct providers of intake, assessment, eligibility determinations or other direct provider services, except training services. Further, it requires the state workforce development board to establish the criteria by which a local workforce development board may request permission to operate under this section and the criteria by which such permission may be granted. This includes but is not limited to a reduction in the cost of providing the permitted services and the requirement that such permission shall be granted for a period not to exceed three years for any single request submitted by the local workforce development board.

CareerSource Flagler Volusia requests approval for designation as a direct provider of workforce services. The local workforce development board provided the required documentation as described in CareerSource Florida Administrative Policy 083: Direct Provider of Workforce Services. FloridaCommerce has reviewed the submitted documentation.

CareerSource Florida and FloridaCommerce recommend approval of the local workforce development board's request for designation as direct provider of workforce services.

### **FOR CONSIDERATION**

- **Authorize CareerSource Flagler Volusia's request to be designated as a Direct Provider of Workforce Services starting Oct. 1, 2023, through July 1, 2026.**



**Robin R. King**  
President & CEO

August 28, 2023

Ms. Christa Nelson  
Florida Department of Commerce  
Bureau of One-Stop and Program Support  
Caldwell Building  
107 E Madison Street  
Tallahassee, Florida 32399

Dear Ms. Nelson:

Attached please find CareerSource Flagler Volusia's request to serve as a Direct Provider of Workforce Services.

The request was presented and approved by the Flagler Board of County Commissioners and the Volusia County Council.

If you have any questions or need any further information, please do not hesitate to contact me.

Sincerely,

A handwritten signature in blue ink, appearing to read "Robin King", is written over the typed name and title.

Robin King  
President & CEO

cc: Mr. Dan McGrew  
Workforce Program Development  
Senior Vice President



## **LWDB 11 – CareerSource Flagler Volusia Direct Services Provider – Request**

**Date:** June 28<sup>th</sup>, 2023

**RE:** Request to serve as a Direct Provider of Workforce Services

### **1. Business Model:**

The Workforce Development Board of Flagler and Volusia Counties, Inc. d.b.a CareerSource Flagler Volusia (CareerSourceFV) is requesting that all job seeker and business services for adults and dislocated workers are to be provided directly by CareerSourceFV to reduce overhead costs created through the procurement of service providers. Additionally, CareerSourceFV is making this request in order to quickly pivot during the merger with CareerSource Brevard to ensure that no services are disrupted.

CareerSourceFV is responsible for constant improvement of the organizational structure to efficiently and effectively manage the day-to-day operations to ensure CareerSourceFV's Local Plan is carried out and provides excellent customer service, achieving State and Federal required performance measures, completing all reports and meeting all deadlines.

By providing direct services to businesses, CareerSourceFV is better able to align with the structure of services provided by CareerSource Brevard. The Request for Proposal (RFP) schedule requires selection of new contractors with a contract start date of July 1<sup>st</sup>, 2024 in LWDB 11, while the RFP schedule for LWDB 13 requires selection of new contractors with a contract start date of July 1<sup>st</sup>, 2025. With this overlap in procurement schedule and the unknown timeline of merger of the two regions, CareerSourceFV would like to be positioned to step in quickly to ensure that there is no disruption of services in the three-county area while new providers of services are procured.

Currently CareerSourceFV has two contracted providers who have provided services to adult and dislocated workers since July 1, 2016 in the three Career Centers and throughout the two county area through community partnerships. However, by eliminating the two Career Center providers and making all staff CareerSourceFV board employees, there will be a significant cost savings that will allow CareerSourceFV to provide for additional services to the residents in the two-county area. In addition, the management structure will become streamlined without redundant overhead and will provide direct supervision without the additional layer of provider management.



Under this structure CareerSourceFV will continue to provide the full menu of workforce services in each of the three brick and mortar facilities, community locations in the county area, as well as services provided virtually under the following programs:

- Workforce Innovation and Opportunity Act Title III (Wagner-Peyser)
- Workforce Innovation and Opportunity Act Title I
- Welfare Transition Program/ Temporary Assistance for Needy Families
- Supplemental Nutrition Assistance Employment & Training Program
- UC/Unemployment Compensation (Reemployment Assistance)
- Jobs for Veterans State Grant

A description of the proposed new organizational structure is discussed more at length in section 5. – Firewall.

## **2. Effective Dates:**

The effective date of this request will begin October 1<sup>st</sup>, 2023 for business services and potentially July 1<sup>st</sup>, 2024 for all direct adult and dislocated worker career services if needed due to the merger with CareerSource Brevard.

## **3. Period of Time:**

The request period of time is for at a minimum of 9 months (until the end of PY23-24) and for up to three years dependent on the timeline of consolidation with CareerSource Brevard and the ability to procure training and career services for the three-county area.

## **4. Reasoning for Request:**

This new structure allows for direct communication between the board of directors, executive leadership, management, and frontline staff, creating cohesive practices across all levels of the organization. This direct communication eliminates a 'middle-man' and provides a clean, consistent, and unfiltered conduit of information to staff ensuring quick turn around on directives and changes in business. It will also allow CareerSourceFV to be more proactive to dynamic changes in the labor market, economy, business environment, funding fluctuations and regional changes as a result of the merger with CareerSource Brevard by being a more lean and nimble organization.

As the implementation of the REACH Act moves forward with the merger between CareerSourceFV and CareerSource Brevard the request for direct service provider allows for the ability to ensure that there are no disruption of services to job seekers and businesses. With the timeline of operational consolidation between the two regions undetermined at this time, CareerSourceFV wants to align its operations as closely as possible for CareerSource Brevard and to ensure that there will be no disruption of services to the communities that both regions serve.

Additionally, providing more consistent messaging to frontline staff will eliminate most perceived communication issues within the organization. Since administrative and Career Center staff closely plan and implement any changes to the organization, the

consistency of messaging provides a clear and concise vision to all staff. All CareerSourceFV staff will receive the same messaging, so all expectations and service delivery requirements are managed and delivered to the same high standard across all programs of the organization.

The structure of business service staff becoming CareerSourceFV Board staff will create some cost savings in payroll and financial processing services.

## **5. Firewall:**

The Workforce Innovation and Opportunity Act (WIOA) requires that workforce boards that provide direct services are required to provide adequate internal firewalls to ensure the integrity of public funding.

CareerSourceFV policies define the role of the Board of Directors, President & CEO, executive leadership and staff. Through continued communication from the CareerSourceFV President & CEO to the CareerSourceFV Board of Directors, the message is clearly delivered that the Board's primary mission is for design, oversight and policymaking. This includes identifying and proactively dealing with emerging issues, interpreting the organization's mission to the public, selecting and evaluating the performance of the President & CEO, and establishing and maintaining programs and systems designed to ensure compliance with the terms of charter, contracts, and grants.

The CareerSourceFV Board of Directors hires the President & CEO to perform the operational and administrative functions of the Board. The President & CEO has been designated as the sole person accountable to the CareerSourceFV Board of Directors. The Vice President of Innovative Workforce Solutions, the Vice President of Business Development and Technology, the Chief Administrative Officer, and the Chief Financial Officer, support the Career Center operations but report directly to and take direction from the President & CEO. Board members and Committee members are keenly aware of the distinction between the roles of Board oversight and the staff's role in managing the day-to-day operations.

The new operation's organizational structure will show that the President & CEO has delegated authority for day-to-day operations management to the Vice President of Innovative Workforce Solutions. The Vice President of Innovative Workforce Solutions is responsible for all programs and services provided through the CareerSource Flagler Volusia system. The Vice President of Innovative Workforce Solutions will direct the Managing Director of Operations (MDOO) who is accountable for all CareerSourceFV and partner staff within the Career Center or affiliated sites. The Vice President of Innovative Workforce Solutions acts as the liaison between the MDOO and executive leadership. The MDOO provides programmatic support and continuous improvement, ensuring that all partner programs within the One Stop 'system' are performing at maximum efficiency. The MDOO will also directly supervise the Department of Economic Opportunity (DEO) Program Administrator, who is responsible for all DEO veteran staff in the Career Centers.



CareerSourceFV administrative staff consists of EO/Human Resources, Information Technology, Finance and Quality Assurance/MIS. The staff members within these departments are not directly involved in the daily execution of services within the Career Centers, but act as support to general operations of the organization.

- All finance and human resources staff report directly to the Chief Financial Officer who in turn reports to the President & CEO and functions between finance and operations are clearly delineated. Financial monitoring will continue to be contracted to an external independent contracted monitor/auditor.
- All information technology staff report directly to the Vice President of Business Development and Technology who in turn reports directly to the President & CEO. These staff manage all facets of technology and communications to the organization. These support staff members provide support to staff in all departments and monitors activities within the system to provide a secure network for customers and staff. Information being transmitted through the network is routinely monitored to ensure that all activities fall within the requirements of applicable State and Federal laws.
- All programmatic monitoring staff report to the Vice President of Innovative Workforce Solutions, who in turn reports directly to the President & CEO. Internal programmatic monitor staff are not individuals delivering direct services to customers in order to maintain the necessary separation and checks and balances. A Quality Assurance plan is currently in place which requires peer monitoring on an ongoing basis by Career Center staff, to ensure that programmatic compliance is imbedded into daily operations. Monitoring staff also complete monthly file reviews based upon guidance from the Florida Department of Economic Opportunity (DEO) and work with management staff to provide any needed staff training based on the results. Programmatic monitoring staff also take the lead to work with DEO for their annual monitoring review, complete any required Corrective Action Plan (CAP) and ensure that any required training is completed with all frontline staff.

**6. Identification of Grant Program(s) that fund the Workforce Service Delivery Model:**

Funding for the Workforce Services Delivery Model may come from the following sources:

- Workforce Innovation and Opportunity Act Adult
- Workforce Innovation and Opportunity Act Dislocated Worker
- Workforce Innovation and Opportunity Act Youth
- Trade Readjustment Allowances/ Trade Adjustment Assistance
- Temporary Assistance for Needy Families
- Supplemental Nutrition Assistance Program
- UC/Unemployment Compensation (Reemployment Assistance)
- Wagner-Peyser
- Jobs for Veterans State Grant, which funds:
  - Disabled Veterans Outreach Program



## Local Veteran Employment Representative

### **7. Analysis of Cost Savings:**

The initial cost savings within the first year (9 months) is estimated to be \$110,000 due to the decrease of the 10% profit of the current contractor who provides business services and fringe costs. While the cost savings is not high, it is difficult to do a cost analysis of the benefits of aligning with CareerSource Brevard's organizational structure.

Should all adult and dislocated worker training and career services (including business services) become Board staff due to the merger, the increase in cost savings would be closer to \$450,000 due to the elimination of staff that serve to support the requirements of contract(s) instead of job seekers and businesses which would result in an increase in direct client contact and services. In addition, as local workforce trends change, CareerSourceFV would have the agility to combine job duties in areas that current contracts do not allow. This flexibility of job duties would result in more efficient services and/or a reduction in cost to CareerSourceFV.

While this request for providing direct services' priority is for providing only business services, CareerSourceFV will continue to analyze and revise the organizational structure as needed in order to provide services in an effective and efficient manner as the merger moves forward.

### **8. Improvements to Service Delivery and Performance Outcomes:**

CareerSourceFV will continue to leverage technology to improve service efficiency and effectiveness by leveraging the technology afforded through the state's online labor exchange and case management systems, Employ Florida and OSST. Innovative use of data dashboards will continue to be used to monitor real time performance of services to both job seekers and businesses. These dashboards are used by frontline staff, management, executive leadership and the CareerSourceFV's Board of Directors and Committee members to inform its mission, track not only the performance tied to the federal indicators, but the demographics, barriers and priority populations of those they serve. The utilization of Microsoft Business Intelligence software to track outcomes and set goals for the region to achieve not only the requirements of the REACH Act, but the intent.

While difficult to measure but generally recognized as a valuable practice is the opportunity for more direct staff involvement in planning and decision-making that affect the individual service delivery locations and the regional workforce system. The participation of program staff in decision-making, including front-line, mid-management and support staff will result in a better decision-making when implementing operating policies and procedures. The clear channel of reporting and accountability permits more effective staff training and development for both new and existing staff.

Greater efficiencies will also be realized in allowing more flexibility in training and support services to customers and timely payments to training vendors because of expediting payment documentation directly from the applicable staff. Real-time tracking of

expenditures, encumbrances and projections for training costs will allow for better management of funds, ensuring a maximum number of clients receive training resources.

### WIOA INDICATORS OF PERFORMANCE

#### CareerSource Flagler Volusia

July 1<sup>st</sup>, 2022 – March 31<sup>st</sup>, 2023

Measures	PY2021-2022 4th Quarter Performance	PY2021-2022 % of Performance Goal Met For Q4	PY2021-2022 Performance Goals	PY2022-2023 1st Quarter Performance	PY2022-2023 % of Performance Goal Met For Q1	PY2022-2023 2nd Quarter Performance	PY2022-2023 % of Performance Goal Met For Q2	PY2022-2023 3rd Quarter Performance	PY2022-2023 % of Performance Goal Met For Q3	PY2022-2023 Performance Goals
Employed 4th Qtr After Exit	84.20	99.64	84.50	86.30	107.88	73.40	91.75	79.60	99.50	80.00
Credential Attainment Rate	69.60	89.23	78.00	68.40	95.00	69.80	96.94	69.20	96.11	72.00
Measurable Skill Gains	93.30	133.29	70.00	83.70	107.31	81.40	104.36	81.00	103.85	78.00
<b>Dislocated Workers:</b>										
Employed 2nd Qtr After Exit	74.50	87.44	85.20	73.30	92.67	75.50	95.45	73.50	92.92	79.10
Median Wage 2nd Quarter After Exit	\$8,840	124.51	\$7,100	\$10,146.00	166.44	\$9,704.00	159.19	\$9,131	149.79	\$6,096
Employed 4th Qtr After Exit	82.10	101.99	80.50	88.00	113.26	80.90	104.12	84.40	108.62	77.70
Credential Attainment Rate	100.00	142.86	70.00	100.00	155.28	87.50	135.87	90.00	139.75	64.40
Measurable Skill Gains	90.60	129.43	70.00	75.70	107.72	69.20	97.19	74.30	104.35	71.20
<b>Youth:</b>										
Employed 2nd Qtr After Exit	93.80	117.99	79.50	90.70	112.81	87.00	108.21	86.90	108.08	80.40
Median Wage 2nd Quarter After Exit	\$3,783	135.11	\$2,800	\$3,810.00	136.12	\$3,783	135.16	\$3,860	137.91	\$2,799
Employed 4th Qtr After Exit	90.80	122.70	74.00	91.50	116.86	88.90	113.54	87.20	111.37	78.30
Credential Attainment Rate	98.80	109.78	90.00	98.80	105.89	100.00	107.18	98.80	105.89	93.30
Measurable Skill Gains	86.10	113.29	76.00	84.60	98.37	86.60	100.70	80.80	93.95	86.00
<b>Wagner Peyser:</b>										
Employed 2nd Qtr After Exit	60.80	93.54	65.00	62.40	96.00	61.60	94.77	66.00	101.54	65.00
Median Wage 2nd Quarter After Exit	\$6,664	130.67	\$5,100	\$6,887.00	123.03	\$6,877.00	122.85	\$7,065	126.21	\$5,598
Employed 4th Qtr After Exit	62.00	95.38	65.00	64.90	99.85	61.60	94.77	65.40	102.15	65.00
Not Met (less than 90% of negotiated)										
Met (90-100% of negotiated)										
Exceeded (greater than 100% of negotiated)										

As seen in the chart above, CareerSourceFV has met or exceeded every WIOA measure for the first three quarters of the current program year.

#### **9. Public Comment:**

The draft of the “Request to serve as a Direct Provider of Workforce Services” is available on the CareerSource Flagler Volusia website at [Doing Business With Us Archives - CareerSource Flagler Volusia \(careersourcefv.com\)](https://careersourcefv.com). Any public comments will be submitted to DEO and will be posted on CareerSourceFV’s website during the 30-day comment period.

#### **10. Approval of the Chief Elected Official:**

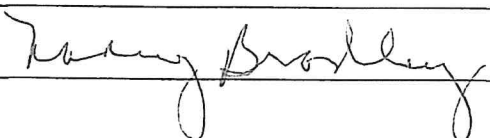
The current document has been submitted to the Volusia County Council and the Flagler County Commissioners for approval. Upon approval the Chief Elected Official of both counties will formally sign the “Statement of Intent”.

#### **11. Completed Statement of Intent to Serve as a Direct Provider of Workforce Services:**

The “Statement of Intent to Serve as a Direct Provider of Workforce Services” is attached to this document.

**STATEMENT OF INTENT  
(Requesting Permission to Serve As a Direct Service Provider)**

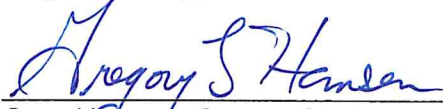
<b>LOCAL WORKFORCE AREA INFORMATION</b>	
Name of Local Area:	CareerSource Flagler Volusia
LWDB Number:	LWDB 11
Date of Submission:	June 28th, 2023
Contact Person Name:  Robin R. King	Phone: 386-323-7077  Email Address: robinking@careersourcefv.com
<b>AMENDMENT TO THE LOCAL WORKFORCE SERVICES PLAN</b>	
<p>This amendment authorizes designation of the Local Workforce Development Board as a direct provider of certain services by agreement of the Chief Elected Official and the Governor.</p> <p>The Local Workforce Service Plan will be amended to include designation of the Local Workforce Development Board as a direct provider of workforce services (other than training services). This amendment to the Local Workforce Service Plan will be effective for the period from <u>October 1<sup>st</sup>, 2023</u> through <u>July 1<sup>st</sup>, 2026</u>.</p> <p>The signatures below certify agreement to the plan amendment submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this plan amendment and applicable federal and state laws and regulations.</p>	

<b>LOCAL WORKFORCE DEVELOPMENT BOARD CHAIRMAN</b>	
Name: Nancy Bradley	Title: Chair, Board of Directors
Signature: 	Date: 6/28/2023

<b>LOCAL CHIEF ELECTED OFFICIAL</b>	
Name and Title:	County:
Signature:	Date:

At the Flagler County Board of Commissioners Meeting held on August 7, 2023, the designated local elected official of Flagler County/Local Workforce Development Board 11, approved the planned change in service delivery.

Board of County Commissioners  
Flagler County, Florida

A handwritten signature in blue ink that reads "Gregory S Hansen". The signature is written in a cursive style with a horizontal line underneath it.

Greg Hansen, County Chair  
Flagler Board of County Commissioners

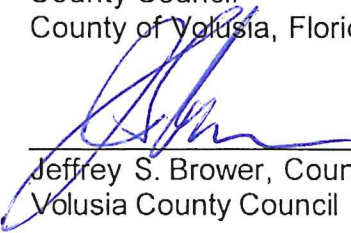
SSM

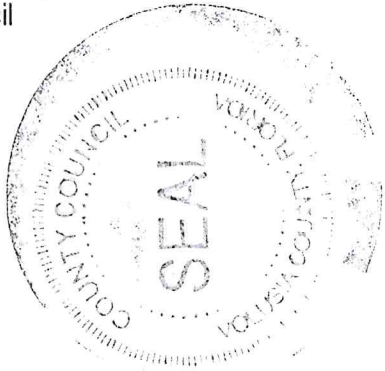
At the Volusia County Council Meeting held on August 1, 2023, the designated local elected official of Volusia County/Local Workforce Development Board 11, approved the planned change in service delivery.

Attest:

County Council  
County of Volusia, Florida

  
\_\_\_\_\_  
George Recktenwald  
County Manager

  
\_\_\_\_\_  
Jeffrey S. Brower, County Chair  
Volusia County Council

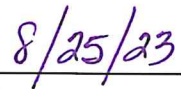




In accordance with Administrative Policy #83 "Direct Provider of Workforce Services", CareerSource Flagler Volusia posted notification of the request to operate as a direct provider of workforce services on the organization's webpage.

As of COB, August 25, 2023 no public comments have been received.

  
\_\_\_\_\_  
Anna C. Lesizza  
Chief Administrative Officer

  
\_\_\_\_\_  
Date



Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## Consent Item 5

### REQUEST TO SERVE AS ONE-STOP OPERATOR

The Workforce Innovation and Opportunity Act requires local workforce development boards to use a competitive procurement process to select a one-stop operator and to conduct a competitive procurement of one-stop operators at least once every four years. Local workforce development boards may serve as a one-stop operator, if selected through the competitive procurement process pursuant to 20 Code of Federal Regulations 678.605 and 678.615(a). In instances where the local workforce development board competes to serve as one-stop operators, the procurement process must be completed by a third party. The third party may be a consultant, a professional or any other independent entity retained specifically to arrange, notice and process the procurement. The third party must not bid on, compete for or have any financial interest in the contract for procurement or its outcome. Pursuant to [CareerSource Florida Administrative Policy 97 – One-Stop Operator Procurement](#), if the local workforce development board successfully competes to serve as the one-stop operator, the local workforce development board must obtain approval from the Governor and the chief local elected official.

FloridaCommerce received two requests from local workforce development boards to serve as a one-stop operator.

1. CareerSource Research Coast, serving as the third party for CareerSource Polk, published a Request for Proposal on May 2, 2023. The deadline for proposals was May 31, 2023. CareerSource Polk was the only respondent to the Request for Proposal. CareerSource Research Coast submitted a letter to CareerSource Polk's Board of Directors on June 9, 2023, recommending CareerSource Polk as the one-stop operator. The recommendation was approved by CareerSource Polk's Board of Directors on June 15, 2023. Subsequently, the chief local elected officials approved the recommendation by way of executing an agreement with CareerSource Polk on July 11, 2023, to serve as the one-stop operator. Pursuant to CareerSource Florida Administrative Policy 97 – One-Stop Operator Procurement, CareerSource Polk has met the requirements to serve as the one-stop operator for CareerSource Polk.

FloridaCommerce recommends the CareerSource Florida Board of Directors authorize CareerSource Polk to serve as the one-stop operator effective July 1, 2023, through June 30, 2027.

2. The Florida Workforce Development Association, serving as the third party for CareerSource Okaloosa Walton, published a Request for Proposal on April 24, 2023. The deadline for proposals was May 24, 2023. CareerSource Okaloosa Walton was the only respondent to the Request for Proposal. The Florida Workforce Development Association submitted a letter to CareerSource Okaloosa Walton's Board of Directors on June 9, 2023, recommending CareerSource Okaloosa Walton as the one-stop operator. The recommendation was approved by CareerSource Okaloosa Walton's Board of Directors on June 14, 2023. Subsequently, the chief local elected officials approved the recommendation by way of executing an agreement with CareerSource Okaloosa Walton on July 18, 2023, to serve as the one-stop operator. Pursuant to CareerSource Florida Administrative Policy 97 – One-Stop Operator Procurement, CareerSource Okaloosa Walton has met the requirements to serve as the one-stop operator for CareerSource Okaloosa Walton.

FloridaCommerce recommends the CareerSource Florida Board of Directors authorize CareerSource Okaloosa Walton to serve as the one-stop operator effective July 1, 2023, through June 30, 2026.

## **FOR CONSIDERATION**

- **Authorize CareerSource Polk to serve as one-stop operator effective July 1, 2023, through June 30, 2027.**
- **Authorize CareerSource Okaloosa Walton to serve as a one-stop operator effective July 1, 2023, through June 30, 2026.**

### **Supporting Documents**

- **CareerSource Polk's request for authorization to serve as the one-stop operator for local workforce development board 17, CareerSource Polk.**
- **CareerSource Okaloosa Walton's request for authorization to serve as the one-stop operator for local workforce development board 2, CareerSource Okaloosa Walton.**





**REQUEST FOR PROPOSAL  
FOR  
ONE-STOP OPERATOR, CAREERSOURCE POLK**

**RFP-PWDB-23-OSO-01  
Date Issued: May 2, 2023  
DEADLINE FOR SUBMISSION: May 31, 2023**

**Submit Responses Electronically Only to:**

**CareerSource Research Coast**

[proposals@careersourcerc.com](mailto:proposals@careersourcerc.com)

As an equal opportunity employer and program, CareerSource Polk is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$12.9 million (revised annually). The total cost of this program will be 100% financed with federal funds. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

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## I. BACKGROUND

The Polk County Workforce Development Board, Inc. dba CareerSource Polk (CSP) a not-for-profit 501(c) (3) corporation, serves as fiscal agent and provider of WIOA Title I services. CareerSource Polk is governed by an independent volunteer board of directors, whose members are appointed by the Polk County Board of County Commissioners. To service Polk County area, thousands of jobseekers and businesses receive employment and training services through our career center operations. This includes two comprehensive career centers and three satellite offices dedicated to serve the youth through our Young Leaders Program.

The career centers are access points for services available through the system. Job seekers can utilize resource rooms stocked with computers, copiers, faxes, telephones, and job search materials, attend workshops, receive one-to-one job search assistance, career counseling, and access training funds to improve skills. Businesses find qualified employees, post jobs, opportunities for training funds to upgrade the skills of their workforce, and use the Career Centers to conduct recruitment events, get tax credit information, access outplacement services for laid-off employees and be connected to other economic development resources and initiatives. Additional information on programs and services is available at [www.careersourcepolk.com](http://www.careersourcepolk.com)

At the time of this RFP, CSP has two (2) full-service career centers:

1. 500 E. Lake Howard Dr., Winter Haven, FL 33881
2. 309 N Ingraham Ave., Lakeland, FL 33801

The Administrative Offices are located at 600 N Broadway Ave., Suite B, Bartow, FL 33830

## II. OVERVIEW OF SERVICES SOLICITED UNDER THIS RFP

### A. Background:

WIOA's focus is on further enhancing the high quality one-stop center system by continuing to align investments in workforce, education, and economic development to regional in-demand jobs. The new law places greater emphasis on local resource coordinator to better meet the needs of jobseekers, workers, and businesses. This includes the cultivation of partnerships and strategies necessary for one-stops to provide job seekers and workers with the high-quality career services, education and training, and supportive services. Therefore, under WIOA the Career Centers are required to partner with a range of federally funded employment and training programs to promote the coordination of services on behalf of job seekers and businesses. The one-stop operator will be integral in supporting the system and coordinating these services.

CareerSource Research Coast (CSRC) is issuing this Request for Proposal (RFP) as the method of solicitation to assure the greatest degree of open competition and to achieve the best technical proposals and services at the lowest possible cost from qualified entities capable of carrying out the duties of the one-stop operator for CareerSource Polk (CSP) as described in the Workforce Innovation and Opportunity Act (WIOA).

Public notice of this RFP has been published in the local newspaper of general circulation and posted under the Public Notices section of the CareerSource Polk website at <https://www.careersourcepolk.com/public-notices/>

## B. Funding Period

It is the intent to obligate no more than \$30,000 annually for this reimbursement-based contract. At its discretion, CareerSource Polk Board of Directors may amend contracts based on performance and funding availability, and/or renew contracts for up to three consecutive contract periods (July 1 through June 30). Proposers must include their hourly reimbursement rate in the proposal. The rate should be inclusive, and detail all expenses, i.e., travel, etc. CareerSource Polk Board of Directors reserves the right to negotiate amounts based on proposals received.

CareerSource Polk is funded by federal grants, which are subject to ongoing appropriation and actual funding. Due to the nature of the funding source, potential changes in legislation and policies, proposers are advised that any contract awarded under this RFP may be modified to incorporate such changes.

Entities selected and serving as one-stop operators are subrecipients of a Federal award and thus are required to follow the Uniform Guidance. Additional clarification is provided in the Training and Employment Guidance Letter (TEGL) #15-16 as found at

[https://wdr.doleta.gov/directives/attach/TEGL/TEGL\\_15-16\\_Acc.pdf](https://wdr.doleta.gov/directives/attach/TEGL/TEGL_15-16_Acc.pdf)

## III. APPLICANT ELIGIBILITY

The WIOA Joint Final Rule requires Local Workforce Development Boards (LWDBs) to use a competitive process based on the principles of competitive procurement in the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) at 2 CFR part 200, including the Department of Labor (Department) specific requirements at 2 CFR part 2900, which may be found at <http://www.ecfr.gov>. Entities selected and serving as one-stop operators are subrecipients of a Federal award and thus are required to follow the Uniform Guidance.

As described in WIOA Section 121, one-stop operators must be an entity (public, private, or non-profit) or a consortium of entities (including a consortium of entities that, at a minimum, includes 3 or more of the one-stop partners described in subsection (b)(1)), of demonstrated effectiveness, located in the Local Area. Such entities may include:

- An institution of higher education
- An employment service State agency established under the Wagner-Peyser Act
- A community-based organization, non-profit organization, or intermediary
- A private for-profit entity
- A government agency
- Another interested organization or entity that may include a local chamber of commerce or other business organization, or a labor organization.

### Qualifications are as follows:

- An understanding of the Workforce Innovation and Opportunity Act. Similarly, a general understanding of the local workforce system and its stakeholders is not required but preferred.
- Strong, demonstrated experience (3-5 years) facilitating large, diverse stakeholder groups to a common goal or outcome is expected. The ability to remain a neutral facilitator will be critical.
- Experience in meeting agenda development, planning, and execution.
- Ability to work closely with Workforce Development Board to monitor the system's strategic objectives and make recommendations for system continuous improvements.

As an equal opportunity employer and program, CareerSource Polk is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$12.9 million (revised annually). The total cost of this program will be 100% financed with federal funds. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

- Other roles and responsibilities as defined by the Board.

CSP requires that entities must be organized in accordance with State and Federal law and in business for at least 1 year. No person, affiliate, or entity may submit a response or be awarded under contract if:

- Placed on the convicted Proposer list following a conviction for a public entity crime, for a period of 36 months from the date of being placed on the convicted Proposer list.
- Has been debarred or suspended or otherwise determined to be ineligible to receive federal funds by an action of any governmental agency.
- Has not complied with an official order of any agency of the State of Florida or the United States Department of Labor to repay disallowed costs incurred during its conduct of projects, programs, or services.
- Previous contract(s) with CareerSource Polk have been terminated for cause.

## A. Additional Requirements

### 1. Monitoring

WIOA requires the Local Workforce Development Board (LWDB) to conduct monitoring of its one-stop operator. Oversight and monitoring are an integral function of the States and LWDBs to ensure the one-stop operator's compliance with the requirements of WIOA, the activities per the Statement of Work, performance reporting requirements, and the terms and conditions of the contract or agreement governing the one-stop operator. The LWDB must measure, track, and monitor performance, service deliverables, and achievement of program or performance measures.

CareerSource Polk Board of Directors must ensure that the one-stop operator do the following:

- a. Disclose any potential conflicts of interest arising from the relationships of the one-stop operator with training service providers or other service providers, including but not limited to, career services providers.
- b. In coordinating services and serving as a one-stop operator, refrain from establishing practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services, such as intensive employment, training, and education services; and
- c. Comply with Federal regulations, and procurement policies, relating to the calculation and use of profits.

An entity serving as a one-stop operator, that also serves a different role within the one-stop delivery system, may perform some or all these functions when it is acting in its other role if it has established sufficient firewalls and conflict of interest policies and procedures. The policies and procedures must conform to the specifications in 20 CFR § 679.430 for demonstrating internal controls and preventing conflict of interest.

### 2. Confidentiality and Disclosure

The one-stop operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.

The one-stop operator will keep all documents and other information related to the one-stop operator services confidential. Such information will only be disclosed to designated members of the Polk

County Board of County Commissioners, the CareerSource Polk Board of Directors, and appropriate Board staff. Other than these exceptions, the operator will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.

The one-stop operator shall comply fully with all security procedures of the United States, State of Florida, and CareerSource Polk Board of Directors in performance of the contract. The one-stop operator shall not divulge to third parties any confidential information obtained by the contractor or its agents, distributors, resellers, subcontractors, officers, or employees while performing contract work, including, but not limited to, security procedures, business operations information, or commercial proprietary information in the possession of the State or CareerSource Polk.

## **B. Questions**

Questions concerning this Request for Proposal must be submitted in writing via email (with Subject: RFP-PWDB-23-OSO-01 Questions) to the following email address: [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com). Questions must be received no later than the time and date reflected on the Timetable of Events. All questions submitted shall be published and answered in a manner that all respondents will be able to view in accordance with the Timetable of Events. Each respondent is responsible for monitoring the Public Notice section of the CSP website <https://www.careersourcepolk.com/public-notices/>

Respondents shall not contact any CareerSource Polk or CareerSource Research Coast employee for information with respect to this solicitation. CareerSource Research Coast shall not be bound by any verbal information or by any written information that is not contained within the solicitation documents or formally noticed and issued by CareerSource Research Coast.

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#### IV. TIMETABLE/SCHEDULE OF EVENTS

Listed below is the schedule of events identifying important actions and dates/times by which the actions must be taken or completed. Time is stated in terms of local time (EST).

<b>Procurement Activity</b>	<b>Date and Time</b>
RFP Issued and Posted	May 2, 2023
Deadline for Submitting Questions	12:00 PM (EST) May 24, 2023
Questions and Answers Posted	4:00 PM (EST) May 25, 2023
<b>Proposal Submission Deadline</b>	May 31, 2023, by 12:00 PM, EST
Special CSP Executive Committee Meeting	June 2023 (see CSP website for details)
Provision of Services Begins	July 1, 2023

**Submit electronic proposals by posted deadline to:**

CareerSource Research Coast  
at  
[proposals@careersourcerc.com](mailto:proposals@careersourcerc.com)

*\*The Executive Committee Meeting and the Board Meeting are Public Notice open meetings (open to the public) and are posted on the CSP website <https://www.careersourcepolk.com/about-us/board-trustees/board-committee-meetings/>*

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## V. SCOPE OF WORK/SPECIFICATION FOR SERVICES

Each respondent shall be responsible for all services required under this solicitation. The respondent is required to examine the specifications set forth and to be knowledgeable of all conditions and requirements that may affect the work to be performed as described in this solicitation. No allowances will be made to the selected respondent because of lack of knowledge of conditions or requirements and the selected respondent will not be relieved of any liabilities or obligations.

- A. The One-Stop Operator (“Operator”), in a consultant role, will play a critical role in supporting the local workforce system to coordinate its diverse partners to achieve its service delivery vision and reach its to be defined’ performance goals. Specifically, the Operator will:
1. Develop, review, and monitor appropriate memorandum of understanding (between the local board and the one-stop partners) concerning the operation of the one-stop delivery system in the local area. This will include at a minimum:
    - a. The required content of MOUs.
    - b. the way the services will be coordinated and delivered through such a system.
    - c. how the costs of such services and the operating costs of such system will be funded.
    - d. methods of referral of individuals between the one-stop operator and the one-stop partners for appropriate services and activities.
    - e. methods to ensure the needs of workers and youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in the provision of necessary and appropriate access to services, including access to technology and materials, made available through the one-stop delivery system.
    - f. the duration of the MOU and the procedures for amending its duration, and assurances that such MOU shall be reviewed not less than once every 3-year period to ensure appropriate funding and delivery of services.
    - g. such other provisions, consistent with the requirements, as the parties to the agreement determine to be appropriate.
  2. Continuous Improvement of One-Stop Centers: develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies, including at a minimum:
    - a. Coordinating and holding up to four meetings with partners to support the Memorandum of Understanding (MOU) implementation. The Operator will develop meeting agendas (in conjunction with CSP staff), meeting activities, facilitate meetings, and provide meeting notes.
    - b. Establish objective criteria and procedures in assessing the effectiveness, physical and programmatic accessibility in accordance with section 188, if applicable, and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.).
    - c. Develop strategies for technological improvements to facilitate access to, and improve the quality of, services and activities provided through the one-stop delivery system. Such improvements include enhancing digital literacy skills; accelerating the acquisition of skills and recognized postsecondary credentials by participants; strengthening the professional development of providers and workforce professionals; and ensuring such technology is accessible to individuals with disabilities.
    - d. Developing strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies (including but not limited to the design and implementation of common intake, data collection, performance measurement and reporting processes) with local input into such design and implementation.

As an equal opportunity employer and program, CareerSource Polk is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$12.9 million (revised annually). The total cost of this program will be 100% financed with federal funds. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.



3. Develop Quarterly Reports: In conjunction with CSP staff, the One-Stop Operator will develop an appropriate mechanism to report on the progress and performance of the partnerships across the system to the Workforce Development Board through the Workforce Performance Council. The Council meets on the first Wednesday (August, November, February, and May) of every quarter at 1:30 pm. Specific meeting information is posted on the CSP website, <https://www.careersourcepolk.com/about-us/board-trustees/board-committee-meetings/>

CareerSource Polk has been approved to provide and will continue to provide direct career services as defined within the WIOA at sec.134(c)(2) and shown below. As a result, this RFP's Scope of Work does not include the one-stop operator providing training services or providing any of the following career services:

- Eligibility determination
- Outreach, intake, orientation
- Initial assessment of skills and support service needs
- Labor exchange services (job search and placement assistance and career counseling) and services to businesses
- Referrals and coordination with other programs
- Providing Labor Market Information • Providing performance and program cost information of training Proposers
- Providing performance information on Local WDB regarding accountability measures
- Providing information on the availability of and referral to support services, SNAP and TANF
- Providing information and assistance on filing claims for Reemployment Assistance
- Providing assistance in establishing eligibility for financial aid for programs not funded through WIOA.
- Providing services to obtain and retain employment, such as comprehensive assessment, IEP development, group and individual counseling, career planning, short-term pre-vocational services, internship and work experience, work prep, financial literacy, out of area job search, ESOL.
- Providing follow-up services

Per WIOA, one-stop operators MAY NOT perform the following functions:

- convene system stakeholders to assist in the development of the local plan.
- prepare and submit local plans (as required under WIOA sec. 107).
- be responsible for oversight of itself.
- manage or significantly participate in the competitive selection process for one-stop operators.
- select or terminate one-stop operators, career service providers, and youth providers.
- negotiate local performance accountability measures; or
- develop and submit budgets for activities of the Local WDB in the Local Area.

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## VI. PROPOSAL INSTRUCTIONS

### A. Requirements For Responsiveness

To be considered responsive and eligible to be further reviewed and rated, proposals MUST be submitted following these instructions.

1. Proposals must be single-spaced using 12-point font with pages numbered in consecutive order at the bottom. Proposal should be prepared simply and economically, providing a straightforward response to this RFP, with responses labeled and made in the same order as the categories of information requested.
2. Include IRS Determination Letter - Copy of Employer Identification Number (EIN) with registered name assignment and agency designation (as private, non-profit, for profit, public corporation) as granted by the U.S. Internal Revenue Service.
3. Email one (1) signed proposal (preferably blue ink) with all required attachments to email address identified in the RFP, by the deadline specified in the Timetable of Events.

### B. Outline Of Content Required In Proposal

Respond to all categories of information requested below with responses labeled and made in the same order as the categories of information requested.

1. **Proposal Cover Sheet and Required Attachments** (Certifications and Assurances, and IRS Determination Letter)
2. **Entity's Organizational Structure and Qualifications:**
  - a. Organizational Structure
  - b. Entity's name
  - c. Type of Entity - Corporation, partnership, sole proprietorship
  - d. Status as minority-owned, women-owned, or veteran-owned enterprise if applicable; include the Business Enterprise Certificate if applicable.
  - e. Corporate parent, subsidiaries, and/or affiliates
  - f. List of current partners, principles, directors, officers
  - g. Location of main office and all other offices
  - h. Organizational chart showing size and positions.
3. **Qualifications:**
  - a. Provide relevant entity history.
  - b. List of recent assessments (within past 2 years) of nonprofit corporations, locally and in the state of Florida. If partners or other employees serve in an advisory capacity, please list such positions.
  - c. List of recent assessments (within past 2 years) involving workforce entities, locally and in the state of Florida. If partners or other employees serve in an advisory capacity, please list such positions.
  - d. Explain experience in conducting assessments of federal grant programs, including but not limited to WIOA, Wagner-Peyser, Veterans, TANF/SNAP.
  - e. Explain how your firm can provide continuity of staff.
  - f. Explain internal quality assurance practices and procedures.
4. **References:** CSP reserves the right to contact any person(s) or organization(s) who is familiar with the work of respondent to document the qualifications and successful experiences of respondent, as well as to solicit character references.

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- a. Provide three (3) relevant references that can speak to the respondent’s prior experience and past performance in delivering similar services, preferably of similar size and purpose to our organization, and serviced by the same partner, manager and/or senior assigned staff as you propose for this RFP. Include Company Name, Address, Contact Name and Title, Telephone Number, Email, Description of Work, Service Dates, and approximate Contract Value.
  - b. Provide a list of clients, including brief description of work, service dates and approximate contract value, if applicable.
5. **Service Team’s Qualifications:**
- a. Identify proposed team members.
  - b. For each proposed team member, list qualifications in terms of overall experience, nonprofit or federal program assessment experience, and education. Resumes may be included.
6. **Scope of Work / Service Plan:**
- a. Memorandums of Understanding (MOUs)
  - b. Certification and Continuous Improvement of One-Stop Centers
  - c. Develop Annual Report(s)
7. **Price:**
- a. Propose a total price to perform the scope of work identified for one-stop operator services for July 1, 2023 through June 30, 2024.
  - b. Provide estimated cost for each of the three (3) subsequent years under this procurement.

**C. Proposal Review Criteria**

Factors to be considered in evaluating each responsive proposal will include the entity’s relevant experience and availability of staff with professional qualifications and technical abilities, the service plan detailed to meet the scope of work, and price.

Rating Summary: <b>Points Available</b>	<b>Selection Criteria</b>
0	1. Required Cover Sheet and Attachments
0-15	2. Entity’s Organizational Structure and Qualifications
0-15	3. Service Team’s Qualifications
0-40	4. Scope of Work (Service Plan)
0-30	5. Price
<b>100 TOTAL</b>	

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## VII. SELECTION PROCESS

All prospective proposers are prohibited from contacting any CSP board member, committee member or staff, **other than the contact person identified on the cover of this RFP**, regarding this solicitation to avoid actual conflicts, the appearance of conflicts, or undue influence over the process. Contact with anyone for purposes of influencing the outcome of the procurement process will result in the disqualification of the prospective proposer.

The following conditions are applicable to all proposals:

- All proposals are subject to negotiation with the CareerSource Polk Board of Directors.
- Non-conforming proposals may be considered non-responsive and subject to no further review.
- CareerSource Polk Board of Directors reserves the right to request additional information for clarification from proposers, or to allow correction of errors or omissions.
- CareerSource Polk Board of Directors reserves the right to reject all proposals completely or in part, and to accept any proposal that is deemed most favorable to CSP at the time and under the conditions stipulated in the specifications of this request.
- CareerSource Polk Board of Directors reserves the right to retain all proposals submitted; CareerSource Polk Board of Directors will not return proposals. All proposals become the property of CSP and a matter public record available for inspection to any interested parties.

### A. Review and Award

1. CareerSource Polk Board of Directors may act to award an agreement under this solicitation based solely on a proposal as submitted. Therefore, proposals should describe all aspects of services proposed in the most favorable terms from both a price and a technical standpoint. CareerSource Polk Board of Directors reserves the right to request additional data in support of the proposal and/or to request that the proposer make a presentation about its proposal. All successful proposers may be required to participate in negotiations and submit any financial and/or other technical revisions to the proposal prior to final award of an agreement. Furthermore, CareerSource Polk Board of Directors reserves the right to reject any proposal submitted and/or to negotiate with all qualified sources. Receipt of a proposal does not commit CareerSource Polk Board of Directors to authorize negotiations of an agreement, to pay any of the costs associated with preparation of the proposal, to reimburse a proposer for any costs incurred prior to the signing of an agreement, or to procure the requested professional services.
2. Award will be based on the review and rating of proposals received. The President/CEO of CareerSource Research Coast will assign staff members, following the format outlined within this RFP, to complete the initial review for responsiveness. Responsive proposals will be forwarded to the CareerSource Research Coast RFP Review Committee, which will meet on the date/time as indicated on the Timetable of Events. Their recommendation will be presented to the CareerSource Polk Executive Committee, and upon approval, the recommendation will be forwarded to the CSP Board of Directors on the date/time as indicated on the Timetable of Events.
3. The CSP Board of Directors will decide to accept, reject, or accept with modifications the recommendation of the CareerSource Research Coast RFP Review Committee.
4. The approval of a proposal does not provide approval for any proposed cost, term, and/or condition.

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5. Final award of an agreement is contingent upon successful negotiation of an agreement, and acceptance by the respondent of the agreement terms and conditions.

## **B. Negotiations**

The negotiations will involve the full review of services sought and the fees to be charged based on the proposal submitted. If successful, these negotiations will culminate in an agreement. If these negotiations prove to be unsuccessful, negotiations may be entered into with the second selected firm and so forth until an approved firm enters into an agreement.

## **C. Agreement**

1. The respondent selected under this solicitation will enter into an agreement with CSP for one-stop operator services. The agreement will specify the duties of the parties and the terms of the engagement for the Program/Fiscal Year July 1, 2023, through June 30, 2024.
2. CareerSource Polk Board of Directors shall have the option, in its sole and absolute discretion, to negotiate annual contracts for up to three (3) additional one-year periods beyond the completion of the first year, provided quality services are delivered and funding is available.
3. Payment for one-stop operator services will be specified in the agreement.
4. Due to the nature of the funding source, potential changes in legislation and policies, proposers are advised that any contract awarded under this RFP may be modified to incorporate such changes. In addition to any other remedies or rights it may have by law, CareerSource Polk Board of Directors will include the right to terminate the contract without penalty.

## **D. Protest Procedures**

1. Unsuccessful proposers will be notified in writing within 30 days of the decision.
2. Proposers who are not awarded contracts may appeal the contract awarding process within a 10-day period of the notification by submitting a written protest to the President/CEO of CareerSource Research Coast that clearly states the reason for the appeal.
3. The President/CEO of CareerSource Research Coast will review the protest and compare it to the CSP established procurement/evaluation procedures to decide on appropriate action.
4. If it is determined that the action taken in awarding the contract was appropriate and justifiable, the President/CEO of CareerSource Research Coast will notify the protester of the decision to deny the appeal within a 10-day period.
5. If it is determined that the letting of the contract was not in compliance with established procedures, or that other oversights were involved, the President/CEO of CareerSource Research Coast will notify the protester, and the proposal process will be reinitialized.

Appropriate measures will be taken to ensure that established procedures will be followed, and contracts will be let in compliance with those procedures and all applicable law.

6. In cases where the protester is not satisfied with the President/CEO of CareerSource Research Coast's determination, the protester must notify the President/CEO of CareerSource Research Coast in writing within a 10-day period of the determination. The CareerSource Polk's Executive Committee may serve as the Appeals Board and will follow the procedures outlined above. The Executive Committee will review the case and make a final determination. The President/CEO of CareerSource Research Coast or Executive Committee will hear no further appeals.

## **VIII. ATTACHMENTS**

Required Attachments - provided by CSP to be completed by respondents:

- Proposal Cover Sheet
- General Provisions and Assurances

Additional Required Attachment – provided by respondents:

- IRS Determination Letter - Copy of Employer Identification Number (EIN) with registered name assignment and agency designation (as private, non-profit, for profit, public corporation) as granted by the U.S. Internal Revenue Service.

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## IX. PROPOSAL COVER SHEET

### PROPOSAL COVER SHEET

Entity Name: Click or tap here to enter text.

Entity Physical Address: Click or tap here to enter text.

Entity Mailing Address: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

FEID#: Click or tap here to enter text.

Type Of Entity: Click or tap here to enter text.

**PROPOSER CONTACTS:** Please provide the name, title, telephone number and e-mail address of the official contact and an alternate, if available. These individuals shall be available to be contacted as may be appropriate regarding the solicitation schedule.

**Primary Contact:** Click or tap here to enter text.

Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

**Secondary Contact:** Click or tap here to enter text.

Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

I certify that this proposal is submitted in accordance with the provisions and conditions outlined in the RFP, that all the information is complete and accurate, and that this proposal represents a firm and fixed offer to provide the requested services. This offer shall remain valid for a minimum of 90 days. I also certify that the price/fees have been determined independently, without consultation, communication, or agreement with any other proposer or with any other competitor for the purpose of restricting competition as to any matter relating to such fees; and no attempt has been made or will be made by the proposer to induce any other person or agency to submit or not submit a proposal for the purpose of limiting or restricting competition.

**\*Must be signed by individual with the authority to bind the entity.**

Click or tap here to enter text.

**\*Print Name and Title of Authorized Representative**

Click or tap to enter a date.

**\*Signature of Authorized Representative**

**Date**

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## **X. GENERAL PROVISIONS AND ASSURANCES**

The Polk County Workforce Development Board, Inc., dba CareerSource Polk, will not award a grant where the Proposer has failed to accept the GENERAL PROVISIONS, CERTIFICATIONS AND ASSURANCES contained in this section. In performing its responsibilities under this agreement, the Proposer hereby certifies and assures that it will fully comply with the following:

By signing the agreement, the Proposer is providing the assurances and certifications as detailed below:

### **1. COMPLIANCE WITH POLICIES AND LAWS**

The warranty of this Section specifically includes compliance by Proposer and its subcontractors with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265, and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Proposer agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. Proposer will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

### **2. CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER MATTERS**

Proposer certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

### **3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS**

As a condition of funding from CareerSource under Title I of the WIOA, Proposer assures that it will comply fully with the following:

- a. Title VI of the Civil Rights Act of 1964 as amended, 42 U.S.C. 2000d et seq., which prohibits discrimination on the basis of race, color or national origin.
- b. Section 504 of the Rehabilitation Act of 1973 as amended, 29 U.S.C. 794, which prohibits discrimination based on disability.
- c. Title IX of the Education Amendments of 1972 as amended, 20 U.S.C. 1681 et. Seq., which prohibits discrimination based on sex in educational programs.
- d. The Age Discrimination Act of 1975 as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination based on age.
- e. Section 654 of the Omnibus Budget Reconciliation Act of 1981 as amended, 42 U.S.C. 9849, which prohibits discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs.
- f. Section 188 of the Workforce Innovation and Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status

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as a lawfully admitted immigrant authorized to work in the United States or Participation in any WIOA Title I financially assisted program or activity.

- g. The American with Disabilities Act of 1990, P.L. 101-336, which prohibits discrimination on the basis of disability and requires reasonable accommodation for persons with disabilities.
- h. Equal Employment Opportunity (EEO): The Proposer agrees that it shall comply with Executive Order (EO) No. 11246, Equal Employment Opportunity, as amended by EO No. 11375, requires that Federal Contractors and subcontractors not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. It also requires the Proposer and its subcontractors to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin and as supplemented in Department of Labor regulation 29 CFR Parts 33 and 37 as well as 41 CFR Part 60 and 45 CFR Part 80 if applicable.
- i. Proposer also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the grant applicant's operation of the WIOA Title I-financially assisted program or activity, and to all agreements, Proposer makes to carry out the WIOA Title I-financially assisted program or activity. Proposer understands that the United States has the right to seek judicial enforcement of this assurance.

#### **4. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE**

Clean Air and Water Act: When applicable, if this Contract is in excess of \$100,000, Proposer shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Proposer shall report any violation of the above to the contract manager. Energy Efficiency: The Proposer shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Proposer will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Proposer will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

#### **5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY**

Proposer shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is in excess of \$100,000, the Proposer must, prior to contract execution, complete the Certification Regarding Lobbying Form.

#### **6. CONFIDENTIALITY**

It is understood that the Proposer shall maintain the confidentiality of any information, regarding CareerSource customers and the immediate family of any applicant or customer, that identifies or may be used to identify them, and which may be obtained through application forms, interviews, tests, reports from public agencies or As an equal opportunity employer and program, CareerSource Polk is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$12.9 million (revised annually). The total cost of this program will be 100% financed with federal funds. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

counselors, or any other source. Proposer shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CareerSource for purposes related to the performance or evaluation of the Agreement may be divulged to CareerSource or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of the CareerSource. No release of information by Proposer, if Federal or State law requires such release, shall be construed as a breach of this Section.

## **7. RIGHTS TO DATA/COPYRIGHTS AND PATENTS**

CareerSource Polk, State of Florida, and the U.S. Department of Labor, shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

## **8. MONITORING**

At any time and as often as CareerSource, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Proposer shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Proposer's expense, at reasonable locations as determined by CareerSource. Proposer shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CareerSource.

## **9. PUBLIC ANNOUNCEMENTS AND ADVERTISING**

Proposer agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, Proposer shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

## **10. PUBLIC ENTITY CRIMES**

Proposer shall comply with subsection 287.133 (2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Proposer list following a conviction for a public entity crime, may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a Proposer, supplier, subcontractor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.0t7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Proposer list.

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## **11. THE PRO-CHILDREN ACT**

Proposer agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

## **12. TERMINATION FOR DEFAULT/CONVENIENCE**

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 30 days prior written notice to the other party.
- b. CareerSource Polk may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CareerSource Polk may unilaterally terminate this modified agreement at any time that it is determined that:
  - i. Proposer fails to provide any of the services it has contracted to provide; or
  - ii. Proposer fails to comply with the provisions of this modified agreement; or
  - iii. Such termination is in the best interest of CareerSource Polk.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Proposer disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CareerSource Polk, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Proposer shall be liable to CareerSource Polk for damages sustained for any breach of this modified agreement by the Proposer, including court costs and attorney fees, when cause is attributable to the Proposer.

In instances where Proposers/sub grantees violate or breach modified agreement terms, CareerSource Polk will use all administrative, contractual, or legal remedies allowed by law to provide for such sanctions and penalties as may be appropriate.

## **13. PROCUREMENT OF RECOVERED MATERIALS**

Proposer agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

## **14. DOMESTIC PREFERENCES FOR PROCUREMENTS**

Proposer agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

As an equal opportunity employer and program, CareerSource Polk is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$12.9 million (revised annually). The total cost of this program will be 100% financed with federal funds. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

**15. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT**

Proposer agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See [Public Law 115-232](#), section 889 for additional information and 2 CFR part 200.471.

**16. E-Verify**

Proposer warrants and represents that it complies with section 448.095, F.S., where the State of Florida expressly requires the following:

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person’s employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee’s employment eligibility upon the renewal or extension of his or her contract.

**17. Free Speech and Religious Liberty (applicable to Sub-recipients only)**

Proposer agrees to follow the statutory and national policy requirements, as applicable, stated in 2 CFR § 200.300 and Executive Order 13798 Promoting Free Speech and Religious Liberty and Executive Order 13864 Improving Free Inquiry, Transparency and Accountability at College and Universities.

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Proposer

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Name and Title of Authorized Representative

---

Signature Date



The Gainesville Sun | The Ledger  
Daily Commercial | Ocala StarBanner  
News Chief | Herald-Tribune

PO Box 631244 Cincinnati, OH 45263-1244

**PROOF OF PUBLICATION**

Polk Workforce Dev Board  
Polk Workforce Dev Board  
600 N BROADWAY AVE STE B  
BARTHOW FL 33830

STATE OF FLORIDA, COUNTY OF POLK

The Ledger-News Chief, a newspaper printed and published in the city of Lakeland, and of general circulation in the County of Polk, State of Florida, and personal knowledge of the facts herein state and that the notice hereto annexed was Published in said newspapers in the issue dated:

12/09/2021

and that the fees charged are legal.  
Sworn to and subscribed before on 12/09/2021

**LEGAL NOTICE  
REQUEST FOR PROPOSALS  
ONE-STOP OPERATOR  
RFP-PWDB-21-OSO-01**

The Polk County Workforce Development Board, Inc. dba Career-Source Polk is soliciting proposals from qualified entities to provide one-stop operator services as required in WIOA Section 121.

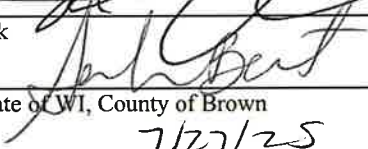
All proposals are due in the Board's administrative office before **Noon (ET) on Monday, January 11, 2021.**

A copy of this Request for Proposals may be obtained from the Board's website:

[www.careersourcepolk.com/publicnotices/requestforproposals](http://www.careersourcepolk.com/publicnotices/requestforproposals) .

Dec 9, 2021 #6622223

  
\_\_\_\_\_  
Legal Clerk

  
\_\_\_\_\_  
Notary, State of WI, County of Brown  
7/27/25

My commision expires

Publication Cost: \$91.01  
Order No: 6622223 # of Copies:  
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PO #:

**THIS IS NOT AN INVOICE!**

*Please do not use this form for payment remittance.*

SARAH BERTELSEN  
Notary Public  
State of Wisconsin

**RECEIVED**

DEC 14 2021





careersourcerc.com

June 9, 2023

Dear Proposer:

The Workforce Development Board of Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) has reviewed your proposal for a One-Stop Operator (OSO) in accordance with the Workforce Innovation and Opportunity Act (WIOA) sec. 121 (d) (2) (a), which requires the Local Workforce Development Board (LWDB) to competitively select a “one-stop operator” to support the implementation of services with the career center system locally. The One-Stop Operator may be a single entity or multiple entities working together to form a consortium operator.

CareerSource Polk (CSP) and your proposal passed technical review and was the only proposal received. Based on this review, CSRC is making the recommendation to the Board of Directors to have CSP serve as the OSO for the Local Workforce Development Area and LWDB17.

This recommendation does not oblige CSP or its Board of Directors to award a contract, or contracts, nor will the CSRC pay any costs incurred in the preparation of proposals. All required backup documentation is available upon request.

Sincerely,

A handwritten signature in blue ink, appearing to read "B. Bauer".

Brian K. Bauer  
President/CEO

Administrative Office  
584 NW University Boulevard, Suite 100 | Port Saint Lucie, FL 34986  
p: 866.482.4473 | f: 866.314.6580







**MINUTES**  
**EXECUTIVE COMMITTEE MEETING – Virtual**  
**Thursday, June 15, 2023 @ 9:00am**

<b>Members</b>		<b>Members</b>		<b>Staff &amp; Guests Present</b>
David McCraw, Chair	P	Sherry Sapp	E	Stacy Campbell-Domineck
Katrina Lunsford	P	Gary Clark	P	
Adil Khan	E	Scott Dimmick	P	

**CALL TO ORDER**

The meeting was called to order at 9:05a by Chair David McCraw.

**APPROVAL OF MINUTES**

Motion to approve the Executive Committee Meeting minutes of February May 16, 2023, was made by Gary Clark and seconded by Scott Dimmick. All voted. The motion was carried unanimously.

**OLD BUSINESS:** There was no old business.

**EXECUTIVE COMMITTEE**

**Recommendation: Approved One-Stop Operator for PY2023-2026**

Chair McCraw directed the committee to pages 5-7 of the agenda packet and called for a motion to approve the recommendation to approve CareerSource Polk as the One-Stop Operator. Chair McCraw Scott Dimmick moved to approve the recommendation and Gary Clark seconded. The floor was open for discussion. Chair McCraw asked CEO Campbell-Domineck to explain why this procurement process was handled by CareerSource Research Coast and CEO explained that DEO notified her in February that the process that we had previously followed was no longer accepted. CareerSource Florida could not approve a board to serve as OSO for years based on a failed procurement. The approval of the board to operate as OSO for failed procurement could only be temporary (maximum of 3 months). Should the board desire to operate as OSO, the procurement must be handled by an outside entity and CareerSource Polk must bid on it just like any other vendor. There were a few questions. All voted and the motion was carried unanimously.

**Report: Board Evaluation of CEO Performance for PY2023**

Chair McCraw discussed the results of the board's evaluation of the CEO, reference the scores and comments reflected on the screen. The combined board scores showed the CEO rated a 2.9 out of a possible 3.0 and all comments were highly positive.

**Recommendation: Approval of Chair Recommendation for Merit Increase for CEO**

Chair McCraw brought forth the recommendation to approve a merit increase for the CEO. Katrina Lunsford made a motion to approve the Board Chair's recommendation Scott Dimmick seconded. The floor was open for discussion. There was key discussion regarding the structure of the increase, and the great work of the CEO. All voted. Motion was carried unanimously.

There was no other business.

The meeting adjourned at 9:32 a.m.

Agreement between  
Polk County, a political subdivision of the State of Florida  
And  
The Polk County Workforce Development Board, Inc., d.b.a. CareerSource Polk

This Agreement is entered into by and between Polk County, a political subdivision of the State of Florida (the "COUNTY") and the Polk County Workforce Development Board, Inc. dba CareerSource Polk (the "BOARD").

The COUNTY and the BOARD wish to enter into an agreement in compliance with the one-stop operator requirements imposed by WIOA.

I. Purpose.

The purpose of this Agreement is to authorize CareerSource Polk to fulfill the duties of the one-stop operator ensuring the appropriate firewalls are in place with regard to oversight, monitoring, and evaluation of performance.

To do so, the BOARD shall have the following responsibilities and authority:

A. Designate personnel to carry out the duties of the one-stop operator as follows:

The one-stop operator ("Operator") will play a critical role in supporting the local workforce system to coordinate its diverse partners to achieve its service delivery vision and reach its 'to be defined' performance goals.

1. The Operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.
2. The Operator will keep all documents and other information related to the one-stop operator services confidential. Such information will only be disclosed to designated members of the Polk County Board of County Commissioners, the Board of Directors, the Executive Committee, and CSP Finance/Audit Committee. Other than these exceptions, the Operator will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.
3. Develop, review and monitor appropriate memorandum of understanding (between the local board and the required one-stop partners) concerning the operation of the one-stop delivery system in the local area. This will include at a minimum:
  - a. The required content of MOUs;
  - b. the manner in which the services will be coordinated and delivered through such system;
  - c. how the costs of such services and the operating costs of such system will be funded;
  - d. methods of referral of individuals between the Operator and the one-stop partners for appropriate services and activities;
  - e. methods to ensure the needs of workers and youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in the provision of



- necessary and appropriate access to services, including access to technology and materials, made available through the one-stop delivery system;
      - f. the duration of the MOU and the procedures for amending its duration, and assurances that such MOU shall be reviewed not less than once every 3-years to ensure appropriate funding and delivery of services; and
      - g. such other provisions, consistent with the requirements, as the parties to the agreement determine to be appropriate.
  - 4. Continuous Improvement of One-Stop Centers: develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies, including at a minimum:
    - a. Coordinating and holding up to four meetings with partners during the program year to support the Memorandum of Understanding (MOU) implementation. The Operator will develop meeting agendas, (in conjunction with CSP staff), meeting activities, facilitate meetings, and provide meeting notes;
    - b. Establish objective criteria and procedures in assessing the effectiveness, physical and programmatic accessibility in accordance with section 188, if applicable, and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.);
    - c. Develop strategies for technological improvements to facilitate access to, and improve the quality of, services and activities provided through the one-stop delivery system. Such improvements include enhancing digital literacy skills; accelerating the acquisition of skills and recognized postsecondary credentials by participants; strengthen the professional development of providers and workforce professionals; and ensure such technology is accessible; and
    - d. Developing strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies (including but not limited to the design and implementation of common intake, data collection, performance measurement and reporting processes) with local input into such design and implementation.
  - 5. Develop Quarterly Reports: In conjunction with CSP staff, the Operator will develop an appropriate mechanism to report quarterly on the progress and performance of the partner across the system to the Workforce Development Board through the Workforce Performance Council.
- B. The BOARD will establish and certify to the County on a biannual basis that sufficient firewalls in regard to oversight, monitoring, and evaluation of performance of the Operator, and conflict of interest policies and procedures are in place and working effectively.

## II. Authority and Responsibility of the County.

The COUNTY shall have the following responsibilities and authority:

- A. Consult from time to time and on a continuing basis with the BOARD or as either party requests;
- B. Ensure that there is no conflict of interest, or the appearance thereof, in the activities of the COUNTY or its members or staff with respect to all activities provided for under this Agreement; and
- C. In collaboration with and at the request of the BOARD, take prompt and decisive corrective action when necessary to comply with the Acts, Regulations, or to assure that performance standards are met.

III. Authority and Responsibilities Held Jointly Between the Board and the County.

- A. It is the joint responsibility of both parties to ensure the effective delivery of services to provide the most benefit to residents and employers of Polk County. It is further the shared responsibility of both parties to stimulate the active and effective participation of all sectors of the community in the provision of workforce development services.
- B. The BOARD and the COUNTY may choose to further effective communication by meeting jointly, on occasion, in accordance with mutually agreed-upon meeting schedules and either party may take whatever additional steps as deemed necessary to assure effective communication between the two bodies.
- C. The BOARD and the COUNTY agree to resolve any disputes between the parties through mutually satisfactory negotiations.

IV. Term.

The term of this Agreement shall begin on July 1, 2023, and shall continue through June 30, 2027 unless the BOARD neglects to fulfill its responsibilities for reasons unforeseen to either of the parties. Either party may terminate this Agreement, with or without cause, upon thirty (30) days written notice to the other party.

V. Merger.

It is understood and agreed that the entire Agreement between the parties is contained herein, and that this Agreement supersedes any oral agreements and/or negotiations between the parties relating to the subject matter hereof. All items referred to in this Agreement are incorporated and deemed a part of this Agreement. This agreement shall supersede the agreement signed by the County on December 6, 2022.

VI. Modification.

This Agreement may only be modified or amended by the mutual consent of the parties hereto, in writing, and consistent with the Acts, or any rule promulgated thereunder.

VII. Independence of Terms.

In the event any terms or provisions of this Agreement or the application to any of the parties hereto, to any extent, be held invalid or unenforceable, the remainder of this Agreement, or the application

unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by the Acts, Regulations, Federal, State, or Local Law.

**IN WITNESS WHEREOF**, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Polk County Workforce Development Board, Inc., through its Chairman authorized to execute it by Board action on the 15 day of June 2023 and by Polk County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 11<sup>th</sup> day of July, 2023.

**POLK COUNTY WORKFORCE DEVELOPMENT BOARD, INC.**

By: David McCraw  
Board Chair

This 28 day of June, 2023

ATTEST:

**POLK COUNTY**  
Board of County Commissioners

By: Alison Holland  
Deputy Clerk

By: [Signature]  
Chairman R. 48

This 11<sup>th</sup> day of July, 2023

Reviewed as to form and legality

[Signature] 7/10/23  
County Attorney Date





# REQUEST FOR PROPOSAL

**WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)  
ONE-STOP OPERATOR  
FOR  
CAREERSOURCE OKALOOSA WALTON**

ISSUE DATE: April 24, 2023

**PROPOSALS DUE: May 24, 2023**

**Submit Responses Electronically Only to:**

Stacy Campbell-Domineck, FWDA President

[fwda.president@careersourcepolk.com](mailto:fwda.president@careersourcepolk.com)

*An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.*

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## I. BACKGROUND

CareerSource Okaloosa Walton (CSOW), a not-for-profit 501c3 corporation, serves as fiscal agent and provider of WIOA Title I services. CSOW is governed by an independent volunteer board of directors, whose members are appointed to provide strategic direction to effectively service Okaloosa and Walton Counties, where thousands of jobseekers and businesses receive employment and training services through its' career center operations.

The career centers are access points for services available through the system. Job seekers can utilize resource rooms stocked with computers, copiers, faxes, telephones, and job search materials, attend workshops, receive one-to-one job search assistance, career counseling, and access training funds to improve skills. Businesses find qualified employees, post jobs, opportunities for training funds to upgrade the skills of their workforce, and use the career centers to conduct recruitment events, get tax credit information, access outplacement services for laid-off employees and be connected to other economic development resources and initiatives. Additional information on programs and services is available at [www.careersourceokaloosawalton.com](http://www.careersourceokaloosawalton.com)

At the time of this RFP, CSOW has one (1) comprehensive career center and one (1) affiliate site.

1. 409 Racetrack Road NE, Fort Walton Beach, FL (comprehensive)
2. 761 North 20th Street, DeFuniak Springs, FL 32433 (affiliate)

## II. OVERVIEW OF SERVICES SOLICITED UNDER THIS RFP

### A. Background:

WIOA's focus is on further enhancing the high quality one-stop center system by continuing to align investments in workforce, education, and economic development to regional in-demand jobs. The new law places greater emphasis on local resource coordination to better meet the needs of jobseekers, workers, and businesses. This includes the cultivation of partnerships and strategies necessary for one-stops to provide job seekers and workers with high-quality career services, education and training, and supportive services. Therefore, under WIOA the career centers are required to partner with a range of federally funded employment and training programs to promote the coordination of services on behalf of job seekers and businesses. The one-stop operator will be integral in supporting the system and coordinating these services.

The Florida Workforce Development Association (FWDA) is issuing this Request for Proposal (RFP) as the method of solicitation to assure the greatest degree of open competition and to achieve the best technical proposals and services at the lowest possible cost from qualified entities capable of carrying out the duties of the One-Stop Operator for CareerSource Okaloosa Walton as described in the Workforce Innovation and Opportunity Act (WIOA).

Public notice of this RFP has been published in the Northwest Florida Daily News and distributed via email to organizations on the CSOW's Bidder's List. Upon its release, the RFP, and all accompanying attachments, will be posted on CSOW's website at [www.careersourceokaloosawalton.com](http://www.careersourceokaloosawalton.com).

### B. Contract / Funding Period

Funding awarded under this RFP is not expected to exceed \$15,000 annually. This amount is provided as a planning figure only and does not commit CareerSource Okaloosa Walton to award a contract for this amount. The Respondent is responsible for proposing a reasonable total cost for delivering the services described in this RFP. Funding during the contract period may be adjusted due to changes in funding received.

This is intended to be a cost reimbursement-based contract. At its discretion, the CareerSource Okaloosa Walton Board of Directors may amend contracts based on performance and funding availability, and/or renew contracts for up to three consecutive contract periods (July 1 through June 30). Proposers must include their hourly reimbursement rate in the proposal. The rate should be inclusive, and detail all expenses, i.e., travel, etc. FWDA reserves the right to negotiate amounts based on proposals received.

CSOW is funded by federal grants, which are subject to ongoing appropriation and actual funding. Due to the nature of the funding source, potential changes in legislation and policies, proposers are advised that any contract awarded under this RFP may be modified to incorporate such changes.

Entities selected and serving as one-stop operators are subrecipients of a Federal award and thus are required to follow the Uniform Guidance. Additional clarification is provided in the Training and Employment Guidance Letter (TEGL) #15-16 as found at [https://wdr.doleta.gov/directives/attach/TEGL/TEGL\\_15-16\\_Acc.pdf](https://wdr.doleta.gov/directives/attach/TEGL/TEGL_15-16_Acc.pdf)

### III. APPLICANT ELIGIBILITY

The WIOA Joint Final Rule requires Local Workforce Development Boards (LWDBs) to use a competitive process based on the principles of competitive procurement in the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) at 2 CFR part 200, including the Department of Labor (Department) specific requirements at 2 CFR part 2900, which may be found at <http://www.ecfr.gov>. Entities selected and serving as one-stop operators are subrecipients of a Federal award and thus are required to follow the Uniform Guidance.

As described in WIOA Section 121, one-stop operators must be an entity (public, private, or non-profit) or a consortium of entities (including a consortium of entities that, at a minimum, includes 3 or more of the one-stop partners described in subsection (b)(1)), of demonstrated effectiveness, located in the Local Area. Such entities may include:

- An institution of higher education
- An employment service State agency established under the Wagner-Peyser Act
- A community-based organization, non-profit organization, or intermediary
- A private for-profit entity
- A government agency
- Another interested organization or entity that may include a local chamber of commerce or other business organization, or a labor organization.

#### **Qualifications are as follows:**

- An understanding of the Workforce Innovation and Opportunity Act. Similarly, a general understanding of the local workforce system and its stakeholders is not required but preferred.
- Strong, demonstrated experience (3-5 years) facilitating large, diverse stakeholder groups to a common goal or outcome is expected. The ability to remain a neutral facilitator will be critical.
- Experience in meeting agenda development, planning, and execution.
- Ability to work closely with Workforce Development Board to monitor the system's strategic objectives and make recommendations for system continuous improvements.
- Other roles and responsibilities as defined by the Board.



Responding entities must be organized in accordance with State and Federal law and in business for at least 1 year. No person, affiliate, or entity may submit a response or be awarded under contract if:

- placed on the convicted Proposer list following a conviction for a public entity crime, for a period of 36 months from the date of being placed on the convicted Proposer list;
- has been debarred or suspended or otherwise determined to be ineligible to receive federal funds by an action of any governmental agency;
- has not complied with an official order of any agency of the State of Florida or the United States Department of Labor to repay disallowed costs incurred during its conduct of projects, programs or services;
- previous contract(s) with CSP have been terminated for cause.

## A. **Additional Requirements**

### 1. **Monitoring**

WIOA requires the Local Workforce Development Board (LWDB) to conduct monitoring of its one-stop operator. Oversight and monitoring are an integral function of the States and LWDBs to ensure the one-stop operator's compliance with the requirements of WIOA, the activities per the Statement of Work, performance reporting requirements, and the terms and conditions of the contract or agreement governing the one-stop operator. The LWDB must measure, track, and monitor performance, service deliverables, and achievement of program or performance measures.

CareerSource Okaloosa Walton Board of Directors must ensure that the one-stop operator do the following:

- a. Disclose any potential conflicts of interest arising from the relationships of the one-stop operator with particular training service providers or other service providers, including but not limited to, career services providers;
- b. In coordinating services and serving as a one-stop operator, refrain from establishing practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services, such as intensive employment, training, and education services; and
- c. Comply with Federal regulations, and procurement policies, relating to the calculation and use of profits.

An entity serving as a one-stop operator, that also serves a different role within the one-stop delivery system, may perform some or all these functions when it is acting in its other role if it has established sufficient firewalls and conflict of interest policies and procedures. The policies and procedures must conform to the specifications in 20 CFR § 679.430 for demonstrating internal controls and preventing conflict of interest.

### 2. **Confidentiality and Disclosure**

The one-stop operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.

The one-stop operator will keep all documents and other information related to the one-stop operator services confidential. Such information will only be disclosed to designated members of the Okaloosa and Walton Counties Boards of County Commissioners, the CSOW Board of Directors, and appropriate Board staff. Other than these exceptions, the operator will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.

The one-stop operator shall comply fully with all security procedures of the United States, State of Florida and CSOW in performance of the contract. The one-stop operator shall not divulge to third parties any confidential information obtained by the contractor or its agents, distributors, resellers, subcontractors, officers, or employees in the course of performing contract work, including, but not limited to, security procedures, business operations information, or commercial proprietary information in the possession of the State or CSOW.

## B. Questions

Questions concerning this Request for Proposals must be submitted in writing via email (with Subject: RFP Questions) to the following email address: [fwda.president@careersourcepolk.com](mailto:fwda.president@careersourcepolk.com). Questions must be received no later than the time and date reflected on the Timetable of Events. All questions submitted shall be published and answered in a manner that all respondents will be able to view in accordance with the Timetable of Events. Each respondent is responsible for monitoring the Public Notice section of the CSP website <https://www.careersourcepolk.com/public-notices/>

Verbal questions/requests for clarification shall not be accepted. Further, FWDA reserves the right to reject any or all requests for clarification, in whole or in part.

All written questions/requests for clarification that are accepted by FWDA will be posted on the CareerSource Okaloosa Walton website by 4:00 p.m., April 28, 2023: [www.careersourceokaloosawalton.com](http://www.careersourceokaloosawalton.com).

To avoid actual or perceived conflict or undue influence over the process, all respondents are prohibited from contacting any CSOW board member, committee member, or staff regarding this RFP. Contact with anyone for the purpose of influencing the outcome of the procurement will result in disqualification of the prospective Respondent from this competitive procurement process.

Respondents shall not contact any CSOW employee for information with respect to this solicitation. FWDA shall not be bound by any verbal information or by any written information that is not contained within the solicitation documents or formally noticed and issued by the FWDA President.

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#### IV. TIMETABLE/SCHEDULE OF EVENTS

Listed below is the schedule of events identifying important actions and dates/times by which the actions must be taken or completed. Time is stated in terms of local time (EST) in Bartow, Florida.

<b>Procurement Activity</b>	<b>Date and Time</b>
RFP Issued and Posted	April 24, 2023
Deadline for Submitting Questions	12:00 PM (CT) April 28, 2023
Questions and Answers Posted	4:00 PM (CT) April 28, 2023
<b>Proposal Submission Deadline</b>	<b>No later than 12:00 PM (CT) May 24, 2023</b>
CSOW Board Approval	June 14, 2023
Notify Approved Bidder	On or about June 16, 2023
Contract Execution	On or about June 21, 2023
Provision of Services Begins	July 1, 2023

**Submit electronic proposals by posted deadline to:**

Stacy Campbell-Domineck, FWDA President  
at  
[fwda.president@careersourcepolk.com](mailto:fwda.president@careersourcepolk.com)

*\*The CSOW Board of Directors Meetings are Public Notice open meetings (open to the public) and are posted on the CSOW website here: [https://www.careersourceokaloosawalton.com/pages/board\\_and\\_exec](https://www.careersourceokaloosawalton.com/pages/board_and_exec)*

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## V. SCOPE OF WORK/SPECIFICATION FOR SERVICES

Each respondent shall be responsible for all services required under this solicitation. The respondent is required to examine the specifications set forth and to be knowledgeable of all conditions and requirements that may affect the work to be performed as described in this solicitation. No allowances will be made to the selected respondent because of lack of knowledge of conditions or requirements and the selected respondent will not be relieved of any liabilities or obligations.

- A. The One-Stop Operator (“Operator”), in a consultant role, will play a critical role in supporting the local workforce system to coordinate its diverse partners to achieve its service delivery vision and reach its to be defined’ performance goals. Specifically, the Operator will:
  1. Develop, review, and monitor appropriate memorandum of understanding (between the local board and the one-stop partners) concerning the operation of the one-stop delivery system in the local area. This will include at a minimum:
    - a. The required content of MOUs;
    - b. the manner in which the services will be coordinated and delivered through such system;
    - c. how the costs of such services and the operating costs of such system will be funded;
    - d. methods of referral of individuals between the one-stop operator and the one-stop partners for appropriate services and activities;
    - e. methods to ensure the needs of workers and youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in the provision of necessary and appropriate access to services, including access to technology and materials, made available through the one-stop delivery system;
    - f. the duration of the MOU and the procedures for amending its duration, and assurances that such MOU shall be reviewed not less than once every 3-year period to ensure appropriate funding and delivery of services;
    - g. such other provisions, consistent with the requirements, as the parties to the agreement determine to be appropriate.
  2. Continuous Improvement of One-Stop Centers: develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies, including at a minimum:
    - a. Coordinating and holding up to four meetings with partners to support the Memorandum of Understanding (MOU) implementation. The Operator will develop meeting agendas (in conjunction with CSOW staff), meeting activities, facilitate meetings, and provide meeting notes;
    - b. Establish objective criteria and procedures in assessing the effectiveness, physical and programmatic accessibility in accordance with section 188, if applicable, and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.);
    - c. Develop strategies for technological improvements to facilitate access to, and improve the quality of, services and activities provided through the one-stop delivery system. Such improvements include enhancing digital literacy skills; accelerating the acquisition of skills and recognized postsecondary credentials by participants; strengthening the professional development of providers and workforce professionals; and ensuring such technology is accessible to individuals with disabilities;
    - d. Developing strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies (including but not limited to the design and implementation of common intake, data collection, performance measurement and reporting processes) with local input into such design and implementation.

3. Develop Quarterly Reports: In conjunction with CSOW staff, the Operator will develop an appropriate mechanism to report on the progress and performance of the partnerships across the system to the Workforce Development Board. Specific meeting information is posted on the CSOW website, [https://www.careersourceokaloosawalton.com/pages/board\\_and\\_exec](https://www.careersourceokaloosawalton.com/pages/board_and_exec).

CareerSource Okaloosa Walton has been approved to provide and will continue to provide direct career services as defined within the WIOA at sec.134(c)(2) and shown below. As a result, this RFP's Scope of Work does not include the one-stop operator providing training services or providing any of the following career services:

- Eligibility determination
- Outreach, intake, orientation
- Initial assessment of skills and support service needs
- Labor exchange services (job search and placement assistance and career counseling) and services to businesses
- Referrals and coordination with other programs
- Providing Labor Market Information • Providing performance and program cost information of training Proposers
- Providing performance information on Local WDB in regard to accountability measures
- Providing information on the availability of and referral to support services, SNAP and TANF
- Providing information and assistance on filing claims for Reemployment Assistance
- Providing assistance in establishing eligibility for financial aid for programs not funded through WIOA
- Providing services in order to obtain and retain employment, such as comprehensive assessment, IEP development, group and individual counseling, career planning, short-term pre-vocational services, internship and work experience, work prep, financial literacy, out of area job search, ESOL.
- Providing follow-up services

Per WIOA, one-stop operators MAY NOT perform the following functions:

- convene system stakeholders to assist in the development of the local plan;
- prepare and submit local plans (as required under WIOA sec. 107);
- be responsible for oversight of itself;
- manage or significantly participate in the competitive selection process for one-stop operators;
- select or terminate one-stop operators, career service providers, and youth providers;
- negotiate local performance accountability measures; or
- develop and submit budgets for activities of the Local WDB in the Local Area.

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## VI. PROPOSAL INSTRUCTIONS

### A. Requirements For Responsiveness

To be considered responsive and eligible to be further reviewed and rated, proposals MUST be submitted following these instructions.

1. Proposals must be on 8.5 x 11-inch white paper, single-spaced using 12-point font, presented single-sided, pages numbered in consecutive order at the bottom. Proposal should be prepared simply and economically, providing a straightforward response to this RFP, with responses labeled and made in the same order as the categories of information requested.
2. Include IRS Determination Letter - Copy of Employer Identification Number (EIN) with registered name assignment and agency designation (as private, non-profit, for profit, public corporation) as granted by the U.S. Internal Revenue Service.
3. Deliver one (1) signed proposal (preferably blue ink) with all required attachments to email address identified in the RFP, by the deadline specified in the Timetable of Events.

### B. Outline Of Content Required In Proposal

Respond to all categories of information requested below with responses labeled and made in the same order as the categories of information requested.

1. **Proposal Cover Sheet and Required Attachments** (Certifications and Assurances, and IRS Determination Letter)
2. **Entity's Organizational Structure and Qualifications:**
  - a. Organizational Structure
  - b. Entity's name
  - c. Type of Entity - Corporation, partnership, sole proprietorship
  - d. Status as minority-owned, women-owned, or veteran-owned enterprise if applicable; include the Business Enterprise Certificate if applicable
  - e. Corporate parent, subsidiaries, and/or affiliates
  - f. List of current partners, principles, directors, officers
  - g. Location of main office and all other offices
  - h. Organizational chart showing size and positions
3. **Qualifications:**
  - a. Provide relevant entity history
  - b. List of recent assessments (within past 2 years) of nonprofit corporations, locally and in the state of Florida. If partners or other employees serve in an advisory capacity, please list such positions.
  - c. List of recent assessments (within past 2 years) involving workforce entities, locally and in the state of Florida. If partners or other employees serve in an advisory capacity, please list such positions.
  - d. Explain experience in conducting assessments of federal grant programs, including but not limited to WIOA, Wagner-Peyser, Veterans, TANF/SNAP.
  - e. Explain how your firm can provide continuity of staff.
  - f. Explain internal quality assurance practices and procedures.
4. **References:** FWDA reserves the right to contact any person(s) or organization(s) who is familiar with the work of respondent to document the qualifications and successful experiences of respondent, as well as to solicit character references.

- a. Provide three (3) relevant references that can speak to the respondent’s prior experience and past performance in delivering similar services, preferably of similar size and purpose to our organization, and serviced by the same partner, manager and/or senior assigned staff as you propose for this RFP. Include Company Name, Address, Contact Name and Title, Telephone Number, Email, Description of Work, Service Dates, and approximate Contract Value.
  - b. Provide a list of clients, including a brief description of work, service dates and approximate contract value, if applicable.
5. **Service Team’s Qualifications:**
- a. Identify proposed team members.
  - b. For each proposed team member, list qualifications in terms of overall experience, nonprofit or federal program assessment experience, and education. Resumes may be included.
6. **Scope of Work / Service Plan:**
- a. Memorandums of Understanding (MOUs)
  - b. Certification and Continuous Improvement of One-Stop Centers
  - c. Develop Annual Report(s)
7. **Price:**
- a. Propose a total price to perform the scope of work identified for one-stop operator services for July 1, 2023 through June 30, 2024.
  - b. Provide estimated cost for each of the three (3) subsequent years under this procurement.

**C. Proposal Review Criteria**

Factors to be considered in evaluating each responsive proposal will include the entity’s relevant experience and availability of staff with professional qualifications and technical abilities, the service plan detailed to meet the scope of work, and price.

Rating Summary: <b>Points Available</b>	<b>Selection Criteria</b>
0	1. Required Cover Sheet and Attachments
0-15	2. Entity’s Organizational Structure and Qualifications
0-15	3. Service Team’s Qualifications
0-40	4. Scope of Work (Service Plan)
0-30	5. Price
<b>100 TOTAL</b>	

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## VII. SELECTION PROCESS

All prospective proposers are prohibited from contacting any CSOW board member, committee member or staff, **other than the contact person identified on the cover of this RFP**, regarding this solicitation to avoid actual conflicts, the appearance of conflicts, or undue influence over the process. Contact with anyone for the purpose of influencing the outcome of the procurement process will result in the disqualification of the prospective proposer.

The following conditions are applicable to all proposals:

- All proposals are subject to negotiation with the CareerSource Okaloosa Walton Board of Directors.
- Non-conforming proposals may be considered non-responsive and subject to no further review.
- The CareerSource Okaloosa Walton Board of Directors reserves the right to request additional information for clarification from proposers, or to allow correction of errors or omissions.
- The CareerSource Okaloosa Walton Board of Directors reserves the right to reject all proposals completely or in part, and to accept any proposal that is deemed most favorable to CSP at the time and under the conditions stipulated in the specifications of this request.
- The CareerSource Okaloosa Walton Board of Directors reserves the right to retain all proposals submitted; The CareerSource Okaloosa Walton Board of Directors will not return proposals. All proposals become the property of CSOW and a matter public record available for inspection to any interested parties.

### A. Review and Award

1. The CareerSource Okaloosa Walton Board of Directors may act to award an agreement under this solicitation based solely on a proposal as submitted. Therefore, proposals should describe all aspects of services proposed in the most favorable terms from both a price and a technical standpoint. The CareerSource Okaloosa Walton Board of Directors reserves the right to request additional data in support of the proposal and/or to request that the proposer make a presentation about its proposal. All successful proposers may be required to participate in negotiations and submit any financial and/or other technical revisions to the proposal prior to final award of an agreement. Furthermore, the CareerSource Okaloosa Walton Board of Directors reserves the right to reject any proposal submitted and/or to negotiate with all qualified sources. Receipt of a proposal does not commit the CareerSource Okaloosa Walton Board of Directors to authorize negotiations of an agreement, to pay any of the costs associated with preparation of the proposal, to reimburse a proposer for any costs incurred prior to the signing of an agreement, or to procure the requested professional services.
2. An award will be based on the review and rating of proposals received. The President of FWDA will assign a member of her team, following the format outlined within this RFP, to complete the initial review for responsiveness. Responsive proposals will be forwarded to the FWDA RFP Review Committee, which will meet on the date/time as indicated on the Timetable of Events. Their recommendation will be presented to the CareerSource Okaloosa Walton Board of Directors on the date/time as indicated on the Timetable of Events.
3. The Board of Directors will decide to accept, reject, or accept with modifications the recommendation of the RFP Review Committee.
4. The approval of a proposal does not provide approval for any proposed cost, term, and/or condition.
5. Final award of an agreement is contingent upon successful negotiation of an agreement, and acceptance by the respondent of the agreement terms and conditions.

## **B. Negotiations**

The negotiations will involve a full review of services sought and the fees to be charged based on the proposal submitted. If successful, these negotiations will culminate in an agreement. If these negotiations prove to be unsuccessful, negotiations may be entered into with the second selected firm and so forth until an approved firm enters into an agreement.

## **C. Agreement**

1. The respondent selected under this solicitation will enter into an agreement with CSOW for one-stop operator services. The agreement will specify the duties of the parties and the terms of the engagement for the Program/Fiscal Year July 1, 2023, through June 30, 2024.
2. CSOW shall have the option, in its sole and absolute discretion, to negotiate annual contracts for up to three (3) additional one-year periods beyond the completion of the first year, provided quality services are delivered and funding is available.
3. Payment for one-stop operator services will be specified in the agreement.
4. Due to the nature of the funding source, potential changes in legislation and policies, proposers are advised that any contract awarded under this RFP may be modified to incorporate such changes. In addition to any other remedies or rights it may have by law, the CareerSource Okaloosa Walton Board of Directors will include the right to terminate the contract without penalty.

## **D. Protest Procedures**

1. Unsuccessful proposers will be notified in writing within 30 days of the decision.
2. Proposers who are not awarded contracts may appeal the contract awarding process within a 10-day period of the notification by submitting a written protest to the President of the FWDA that clearly states the reason for the appeal.
3. The President of the FWDA will review the protest and compare it to the established procurement/evaluation procedures to decide on appropriate action.
4. If it is determined that the action taken in awarding the contract was appropriate and justifiable, the President of FWDA will notify the protester of the decision to deny the appeal within a 10-day period.
5. If it is determined that the letting of the contract was not in compliance with established procedures, or that other oversights were involved, the President of FWWDA will notify the protester, and the proposal process will be reinitialized. Appropriate measures will be taken to ensure that established procedures will be followed and contracts will be let in compliance with those procedures and all applicable law.

6. In cases where the protester is not satisfied with the President of FWDA's determination, the protester must notify the President of FWDA in writing within a 10-day period of the determination. The CSOW Board's Executive Committee may serve as the Appeals Board and will follow the procedures outlined above. The CSOW Board's Executive Committee will review the case and make a final determination. The President of FWDA or Executive Committee will hear no further appeals.

## **VIII. ATTACHMENTS**

Required Attachments - provided by CSP to be completed by respondents:

- Proposal Cover Sheet
- General Provisions and Assurances

Additional Required Attachment – provided by respondents:

- IRS Determination Letter - Copy of Employer Identification Number (EIN) with registered name assignment and agency designation (as private, non-profit, for profit, public corporation) as granted by the U.S. Internal Revenue Service.

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## IX. PROPOSAL COVER SHEET

### PROPOSAL COVER SHEET

Entity Name: Click or tap here to enter text.

Entity Physical Address: Click or tap here to enter text.

Entity Mailing Address: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

FEID#: Click or tap here to enter text.

Type Of Entity: Click or tap here to enter text.

**PROPOSER CONTACTS:** Please provide the name, title, telephone number and e-mail address of the official contact and an alternate, if available. These individuals shall be available to be contacted as may be appropriate regarding the solicitation schedule.

**Primary Contact:** Click or tap here to enter text.

Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

**Secondary Contact:** Click or tap here to enter text.

Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Phone Number: Click or tap here to enter text.

Email Address: Click or tap here to enter text.

I certify that this proposal is submitted in accordance with the provisions and conditions outlined in the RFP, that all the information is complete and accurate, and that this proposal represents a firm and fixed offer to provide the requested services. This offer shall remain valid for a minimum of 90 days. I also certify that the price/fees have been determined independently, without consultation, communication, or agreement with any other proposer or with any other competitor for the purpose of restricting competition as to any matter relating to such fees; and no attempt has been made or will be made by the proposer to induce any other person or agency to submit or not submit a proposal for the purpose of limiting or restricting competition.

**\*Must be signed by individual with the authority to bind the entity.**

Click or tap here to enter text.

\*Print Name and Title of Authorized Representative

Click or tap to enter a date.

\*Signature of Authorized Representative

Date

## **X. GENERAL PROVISIONS AND ASSURANCES**

The Board of Directors of CareerSource Okaloosa Walton will not award a grant where the Proposer has failed to accept the GENERAL PROVISIONS, CERTIFICATIONS AND ASSURANCES contained in this section. In performing its responsibilities under this agreement, the Proposer hereby certifies and assures that it will fully comply with the following:

By signing the agreement, the Proposer is providing the assurances and certifications as detailed below:

### **1. COMPLIANCE WITH POLICIES AND LAWS**

The warranty of this Section specifically includes compliance by Proposer and its subcontractors with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the Workforce Innovation Act of 2000, 45 CFR 98, the Temporary Assistance for Needy Families Program (TANF), 45 CFR parts 260-265, and other applicable federal regulations and policies promulgated thereunder and other applicable State, Federal, criminal and civil law with respect to the alteration or falsification of records created in connection with this Agreement. Office of Management and Budget (OMB) Circulars: Proposer agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200 Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. Proposer will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. 276a to 276a7), the Copeland Act (40 U.S.C. 276c and 18 U.S.C. 874, and the Contract Work Hours and Safety Standards Act (40.327-333), regarding labor standards for federally assisted construction sub agreements.

### **2. CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER MATTERS**

Proposer certifies that it is not currently debarred, suspended, or excluded from or for participation in Federal assistance programs, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Agreement in accordance with 29 CFR Parts 45, 74, 95 and 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement or Non-Procurement Programs.

### **3. NON-DISCRIMINATION, EQUAL OPPORTUNITY ASSURANCES, CERTIFICATIONS, OTHER PROVISIONS**

As a condition of funding from CareerSource under Title I of the WIOA, Proposer assures that it will comply fully with the following:

- a. Title VI of the Civil Rights Act of 1964 as amended, 42 U.S.C. 2000d et seq., which prohibits discrimination on the basis of race, color or national origin.
- b. Section 504 of the Rehabilitation Act of 1973 as amended, 29 U.S.C. 794, which prohibits discrimination based on disability.
- c. Title IX of the Education Amendments of 1972 as amended, 20 U.S.C. 1681 et. Seq., which prohibits discrimination based on sex in educational programs.
- d. The Age Discrimination Act of 1975 as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination based on age.
- e. Section 654 of the Omnibus Budget Reconciliation Act of 1981 as amended, 42 U.S.C. 9849, which prohibits discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation, or beliefs.
- f. Section 188 of the Workforce Innovation and Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or Participation in any WIOA Title I financially assisted program or activity.

- g. The American with Disabilities Act of 1990, P.L. 101-336, which prohibits discrimination on the basis of disability and requires reasonable accommodation for persons with disabilities.
- h. Equal Employment Opportunity (EEO): The Proposer agrees that it shall comply with Executive Order (EO) No. 11246, Equal Employment Opportunity, as amended by EO No. 11375, requires that Federal Contractors and subcontractors not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. It also requires the Proposer and its subcontractors to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin and as supplemented in Department of Labor regulation 29 CFR Parts 33 and 37 as well as 41 CFR Part 60 and 45 CFR Part 80 if applicable.
- i. Proposer also assures that it will comply with 29 CFR Part 37 and all other regulations implementing the laws listed above. This assurance applies to the grant applicant's operation of the WIOA Title I-financially assisted program or activity, and to all agreements, Proposer makes to carry out the WIOA Title I-financially assisted program or activity. Proposer understands that the United States has the right to seek judicial enforcement of this assurance.

#### **4. CERTIFICATION REGARDING CLEAN AIR ACT, WATER ACT, ENERGY EFFICIENCY AND ENVIRONMENTAL STANDARDS, SOLID WASTE**

Clean Air and Water Act: When applicable, if this Contract is in excess of \$100,000, Proposer shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 et seq.), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR Part 15). The Proposer shall report any violation of the above to the contract manager. Energy Efficiency: The Proposer shall comply with mandatory standards and policies relating to energy efficiency which are contained in the State of Florida's Energy Conservation Plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

Proposer will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205). The Proposer will comply with the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act (42 U.S.C. 6962).

#### **5. CERTIFICATION REGARDING LOBBYING AND INTEGRITY**

Proposer shall comply with the provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352) 29 CFR Part 93. When applicable, if this Agreement is in excess of \$100,000, the Proposer must, prior to contract execution, complete the Certification Regarding Lobbying Form.

#### **6. CONFIDENTIALITY**

It is understood that the Proposer shall maintain the confidentiality of any information, regarding CareerSource customers and the immediate family of any applicant or customer, that identifies or may be used to identify them, and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Proposer shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CareerSource for purposes related to the performance or evaluation of the Agreement may be divulged to CareerSource or such other parties as



they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws and policies of CareerSource. No release of information by Proposer, if Federal or State law requires such release, shall be construed as a breach of this Section.

## **7. RIGHTS TO DATA/COPYRIGHTS AND PATENTS**

CareerSource State of Florida, and the U.S. Department of Labor, shall have unlimited rights to inventions made under contract or agreement: Contracts or agreements for the performance of experimental, developmental, or research work shall provide for the rights of the Federal Government and the recipient in any resulting invention in accordance with 37 CFR part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements" and any implementing regulations issued by the awarding agency.

## **8. MONITORING**

At any time and as often as CareerSource, the State of Florida, United States Department of Labor, Comptroller General of the United States, the Inspector Generals of the United States and the State of Florida, or their designated agency or representative may deem necessary, Proposer shall make available all appropriate personnel for interviews and all financial, applicant, or participant books, documents, papers and records or other data relating to matters covered by this contract, for examination and/or audit, and/or for the making of excerpts or copies of such records for the purpose of auditing and monitoring activities and determining compliance with all applicable rules and regulations, and the provisions of this Agreement. The above referenced records shall be made available at the Proposer's expense, at reasonable locations as determined by CareerSource. The proposer shall respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CareerSource.

## **9. PUBLIC ANNOUNCEMENTS AND ADVERTISING**

Proposer agrees that when issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part under this Agreement, Proposer shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money under this Agreement and (2) the dollar amount of Federal funds for the project or program.

## **10. PUBLIC ENTITY CRIMES**

Proposer shall comply with subsection 287.133 (2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Proposer list following a conviction for a public entity crime, may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a Proposer, supplier, subcontractor or consultant under a contract with any public entity and may not transact business with any public entity in excess of the threshold amount provided in section 287.07, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Proposer list.

## **11. THE PRO-CHILDREN ACT**

Proposer agrees to comply with the Pro-Children Act of 1994, 20 U.S.C. 6083. Failure to comply with the provisions of the law may result in the imposition of civil monetary penalty up to \$1,000 for each violation and/or the imposition of an administrative compliance order on the responsible entity. This clause is applicable to all approved subcontracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking

in any portion of any indoor facility used for the provision of federally funded services including health, day care, early childhood development, education, or library services on a routine or regular basis, to children up to age 18.

## **12. PROCUREMENT OF RECOVERED MATERIALS**

Contractor agrees to comply with the provisions of section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, and as supplemented by 2 CFR Appendix II to part 200 and 2 CFR part 200.323 and the requirements stated therein.

## **13. DOMESTIC PREFERENCES FOR PROCUREMENTS**

Contractor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.322 and the requirements stated therein.

## **14. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT**

Contractor agrees to comply with the provisions of 2 CFR Appendix II to part 200 and 2 CFR part 200.216 and the requirements stated therein. See Public Law 115-232, section 889 for additional information and 2 CFR part 200.471

## **15. PROVISION OF SERVICES**

Contractor agrees to provide goods and services as specified on Attachment 1.

## **16. E-VERIFY**

Contractor warrants and represents that it is in compliance with section 448.095, Florida Statutes, as may be amended, and that it: (1) is registered with the E-Verify system (<https://www.e-verify.gov/>), and beginning January 1, 2021 uses the E-Verify system to electronically verify the employment eligibility of all newly hired workers; and (2) has verified that all of Contractor's subcontractors performing the duties and obligations of the Agreement are registered with the E-Verify System, and beginning January 1, 2021, use the E-Verify System to electronically verify the employment eligibility of all newly hired workers.

## **17. TERMS**

This Agreement shall become effective with the latest date of signature on the Agreement and shall remain in force until June 30, 2022, unless otherwise terminated as provided for herein.

## **18. TERMINATION FOR DEFAULT/CONVENIENCE**

This modified agreement may be terminated as follows:

- a. Either party may request termination of the modified agreement upon 30 days prior written notice to the other party.
- b. CareerSource Okaloosa Walton Board of Directors may unilaterally terminate or modify this modified agreement, if for any reason either the U.S. Department of Labor or the State of Florida reduces funding through the grants under which this modified agreement is funded.
- c. CareerSource Okaloosa Walton Board of Directors may unilaterally terminate this modified agreement at any time that it is determined that:
  - i. Proposer fails to provide any of the services it has contracted to provide; or
  - ii. Proposer fails to comply with the provisions of this modified agreement; or
  - iii. Such termination is in the best interest of CareerSource Okaloosa Walton.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Proposer disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CareerSource Okaloosa Walton, who will conduct a grievance hearing and decide, from evidence presented by both parties, the validity of termination.

In the event this modified agreement is terminated for cause, Proposer shall be liable to CareerSource Okaloosa Walton for damages sustained for any breach of this modified agreement by the Proposer, including court costs and attorney fees, when cause is attributable to the Proposer.

In instances where Proposers/sub grantees violate or breach modified agreement terms, CareerSource Okaloosa Walton will use all administrative, contractual, or legal remedies allowed by law to provide for such sanctions and penalties as may be appropriate.

**19. STEVENS AMENDMENT**

This project is supported by the Employment and Training Administration of the U.S. Department of Labor as part of an award totaling \$3,912,739.00 with 0% financed from non-governmental sources.

Click or tap here to enter text.

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Proposer

Click or tap here to enter text.

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Name and Title of Authorized Representative

Click or tap to enter a date.

---

Signature

Date



**Board of Directors Meeting  
June 14, 2023 - 9:00 a.m.**

*All Board Meetings are open to the Public and are electronically recorded*

- I. Call to Order.....**Scott Seay, Chair**
- II. Consent Agenda
  - **March 8, 2023 meeting minutes**
  - **Continuation of CSOW contribution to 401(k) – The current rate is 8%**
  - **Holiday Schedule – see attached**
  - **One-Stop Hours of Operation – Centers are open to the public from 8:00am – 4:00pm Monday through Friday**
- III. DEO Performance Presentation.....**Daniel Harper**
- IV. James Moore Audit Presentation.....**Ben Clark**
- V. Election of Officers.....**Alan Baggett**
- VI. One-Stop Operator.....**Michele Burns**
- VII. Finance Committee.....**Bill Dillman**
  - **Initial Budget PY 2023-2024**
  - **Request to Move WIOA Funds**
- VIII. Business & Education Committee.....**Michelle Crocker**
  - **Regional Demand Occupation List (RDOL)/Eligible Training Providers List (ETPL)**
- IX. Executive Committee.....**Scott Seay**
- X. Executive Director’s Report .....**Michele Burns**
  - **Financial Disclosure reminder – Due by July 1, 2023**
- XI. CareerSource Okaloosa Walton Partner Updates
  - **Education**
  - **Vocational Rehabilitation**
  - **Okaloosa EDC/Walton EDA**
  - **Okaloosa & Walton Boards of County Commissioners**
  - **Military**
  - **Tri-County Community Council**
- XII. Chair’s Comments.....**Scott Seay**
- XIII. Roundtable Board Members Updates/Public Comments.....**Scott Seay/All**
- XIV. Adjournment.....**Scott Seay**

**The next CareerSource Okaloosa Walton Board meeting: Sept 6, 2023 at 9:00 a.m.**

Board members who have a conflict of interest on any issue coming before the board for a vote must declare the nature of the conflict, abstain from discussions, and not offer any motion or second on the issue. Board members declaring a conflict of interest must also complete a Conflict of Interest Form.

**Financial Disclosure Notice:** All Board members are required to file appropriate financial disclosure form(s) within 30 days of appointment, within 60 days of resignation and annually by July 1<sup>st</sup>. Information is available at [www.ethics.state.fl.us](http://www.ethics.state.fl.us).



**Board of Directors meeting \* June 14, 2023 – 9:00 am.**

**Call to Order:** Scott Seay called the meeting to order at 9:02 am and welcomed the DEO representatives attending and new Board members Bob Bennett & Dr. Jeff McGill.

**Attending were:**

Alan Baggett	Bob Bennett	Michelle Crocker
Wyndy Crozier	Jean Ann Encardes	Louis Erickson
David Haines	Dr. Jeff McGill	Rebecca Pazik
Cheryl Pedone	Scott Seay	Leslie Sheekley
Nathan Sparks	Al Ward	Melinda Bowers
Daniel Harper	Valerie Peacock	Tameka Austin
Yvette McCullough	Shawn Brown	Ben Clark

**CSOW staff members present:**

Michele Burns	Kelly Jordan	Shawn Knobel
Will Miles	Sue Berntsen	

**Approval of Consent Agenda:**

March 8, 2023 minutes                      Continuation of CSOW 401(k) contributions  
 Holiday schedule                              One-Stop Hours of Operation

*A motion by Michele Crocker, seconded by Leslie Sheekley, to approve the March 8, 2023 minutes as presented. All Ayes.*

**DEO Performance Presentation:** Daniel Harper and Valerie Peacock presented the DEO Performance review of CSOW, beginning with an overview Funding Sources, Oversight, and Local Service Delivery, progressing to state-level funding and local board funding. They then covered Direct Client Services and Administrative expenditures, ITA, Work Experience, and Out-of-School Youth expenditures. After explaining the Primary Indicators of Performance they moved to Local Performance Results and Self-Sufficiency Quarterly Results. An explanation of the new Letter Grade metrics developed by the Governor’s R.E.A.C.H. office which are based on local Board Primary Indicators of Performance and Return on Investment. The majority of the grade is based on the improvement of each local Board. Our current grade, just released yesterday, is 83.77, a strong B.

Program Monitoring Activities and Financial Monitoring Activities, comparing PY 20 and PY 21 results showed no findings in either year and one Technical Assist.

**Audit Presentation:** Ben Clark of James Moore reviewed the Audit for June 30, 2022, reviewing financial statements which are materially correct, which is the best opinion. New accounting standards required that the leases had to be added to the balance sheet. Compliance factors for all major grants are included in a single audit. The Total Net Position is about \$372K, in line with the prior year. There are no material weaknesses noted and compliance requirements were met. The earmark for 20% for Youth Work Experience was noted. There is a potential waiver for this and a management response is included. It is a Program issue, but Finance gets the finding.

**Election of Officers:** Scott Seay thanked the Committee for their work. Alan Baggett presented the recommended slate, and asked if there were any nominations from the floor. There were none and no further discussion.

*A motion by Nathan Sparks, seconded by Louis Erickson, to approve the Slate of Officers for PY 2023-24 as presented. All Ayes.*

**One-Stop Operator:** Michele Burns explained the procurement process, which has changed. We put out an RFP and received no responses. We cannot automatically be the One-Stop Operator, so we requested and received a three-month extension to 09/30/23, and CareerSource Polk issued an RFP to which we responded and were recommended. Board approval is required, and then it will go to the CareerSource Florida Board in September.

*A motion by Wyndy Crozier, seconded by David Haines, to approve the recommendation that CSOW be the One-Stop Operator. All Ayes.*

**Finance Committee:** Shawn Knobel presented the preliminary budget for 2023-24. It is down slightly from last year. The Get There Faster grant last year was about \$1M, and some remains extended into this year.

*A motion by Al Ward, seconded by Leslie Sheekley, to approve the preliminary budget for 2023-24 All Ayes.*

Shawn then reviewed the budget vs. actual spending as of the end of April. It is being managed and timed to fully expend without overspending. Some issues are just timing. Year-end purchases are ready if funds are available. Two-year grants enable us to be more flexible if needed.

Last year we paid the FWB rent in an annual payment from Discretionary funds, which gives us a discount, and then funds are paid back monthly. Approval is requested to do the same this year.

*A motion by Alan Baggett, seconded by Louis Erickson, to approve paying the FWB annual rent from discretionary funds and repaying monthly. All Ayes.*

We also have the flexibility to move up to 90% of WIOA Dislocated Worker funds to Adult. This was done last year, and was very helpful. Approval is requested to move funds again this year.

*A motion by David Haines, seconded by Al Ward, to approve moving up to 90% of WIOA Dislocated Worker funds to WIOA Adult.* All Ayes.

**Business & Education Committee:** Will Miles gave an overview of the Regional Demand Occupations List (RDOL) developed by DEO and federal entities. We are making no local changes at this time. He then moved to the Eligible Training Providers List (ETPL). We have two new companies with initial applications.

Action Item #1 – Approval of Training Provider Initial Application and Programs to the ETPL.

*A motion by Nathan Sparks, seconded by Al Ward, to add Providers and Programs to the ETPL as presented.* All Ayes.

Action Item #2 – Approve Training Providers Continued Eligibility Application and Programs for 2023-2024.

*A motion by Leslie Sheekley, seconded by Louis Erickson to approve adding Providers and their programs for 2023-24 as presented.* All Ayes.  
Melinda Bowers (UWF), Dr. Jeff McGill (NWFSC), and Wyndy Crozier (ECTC) abstained from the vote due to their employment by the respective institutions.

Will also explained that Apprenticeship providers only have to give notice that they want to be included on the list, and then they may remain there as long as they wish; no Board action is required. LT3, and Northwest Florida State College are apprenticeship providers.

**Executive Committee:** Scott Seay said the Executive Committee has been working on staff retention strategies, and we are still struggling to fill Board positions.

**Executive Director's Report:** Michele Burns said DEO is issuing new policies and procedures. DEO will change to the Dept. of Commerce on July 1<sup>st</sup> with Alex Kelly as the new Secretary. The R.E.A.C.H. office recommendations have been signed, changing Florida from 24 Regions to 21. CSOW is not affected. Regional Planning Boards will be implemented, and Regions 1 – 4 will cooperate. A new policy from FloridaCommerce regarding the Business & Education Committee is due out in September. It may say that no Board members will be members of the Committee; even the Chair cannot be a Board member. Board members will be realigned, following Sector Strategies. We are strong except in health care, we will need assistance adding a representative. The Summer Youth Program started Monday. Thanks to everyone providing donations, space and work experience opportunities.

A reminder that annual Financial Disclosures are due to the Florida Commission on Ethics by July 1<sup>st</sup>.

### **Partner Updates**

Northwest Florida State College – Jeff McGill said they have partnered with FleetForce for CDL training.



Emerald Coast Technical College – Wyndy Crozier said they are excited to have the SYEP students there. The plumbing program starts in August and patient care tech and practical nurse start at Watersound. The adult education program is growing rapidly, doubling numbers every year.

UWF – Melinda Bowers said they are preparing for fall semester with record applications. Civil Engineering will be added in the fall of next year.

One Okaloosa – Nathan Sparks thanked CSOW for our support of TeCMEN Industry Day. They expect to announce a new tenant of Shoal River Ranch on July 13<sup>th</sup>. Okaloosa County has engaged a consultant for an Attainable Housing Strategic Plan. There will be workshops June 27 & 28, and preregistration will be on their website.

**Chair’s Comments:** Scott Seay opened the floor, and Alan Baggett asked about the effects of the Immigration bill that goes into effect July 1<sup>st</sup>. Building, hospitality and agriculture may be seriously affected.

**Adjournment:** There being no further business, the meeting was adjourned at 10:23 am.

**The next Board meeting is scheduled for September 6, 2023, at 9:00 am.**

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## Consent Item 6

### REQUEST FOR EXTENSION TO SERVE AS ONE-STOP OPERATOR

The Workforce Innovation and Opportunity Act requires local workforce development boards to use a competitive procurement process to select a one-stop operator and to conduct a competitive procurement of one-stop operators at least once every four years. Local workforce development boards may serve as a one-stop operator, if selected through the competitive procurement process pursuant to 20 Code of Federal Regulations (CFR) 678.605 and 678.615(a). However, in certain critical circumstances (i.e., sudden termination of contract or failed procurement), the local workforce development board may need to temporarily assume the role of one-stop operator. When this happens, local workforce development boards may request to temporarily assume the responsibilities that were being provided by a contracted vendor or services being sought when the procurement failed. Pursuant to [CareerSource Florida Administrative Policy 110 – Local Workforce Development Area and Board Governance](#), the local workforce development board must obtain approval from the chief local elected official and submit a request in writing to FloridaCommerce which includes:

- A copy of the competitive solicitation.
- Proof of the announcement medium used to include documentation showing how long the announcement was posted.
- Duration for which the local workforce development board will temporarily act as a one-stop operator.
- An explanation and an organizational chart showing who will temporarily be responsible for assuming the role including a description of:
  - Separation of duties – including but not limited to the temporary removal of duties from certain areas/individuals to allow assumption of the temporary role.
  - Firewalls – including but not limited to restriction from access to any information that may lead to impropriety.
  - Conflict of interest requirements.

FloridaCommerce received three requests from local workforce development boards to temporarily assume the role of one-stop operator.

1. CareerSource Palm Beach County submitted a request to FloridaCommerce on July 28, 2023, requesting a three-month extension to serve as the one-stop operator to conduct a competitive procurement pursuant to 20 CFR 678.605 and 678.615(a). The current approval will expire on Sept. 30, 2023.

A Request for Proposal was issued by a third party, the Florida Workforce Development Association, on July 28, 2023. The deadline to submit proposals was Aug. 28, 2023. CareerSource Palm Beach County submitted a proposal to serve as the one-stop operator. The CareerSource Palm Beach County Board of Directors will meet on Oct. 19, 2023, to vote on the Florida Workforce Development Association's recommendation for CareerSource Palm Beach County to serve as the one-stop operator, in order to have a contracted provider in place by Dec. 1, 2023.

FloridaCommerce recommends the CareerSource Florida Board of Directors authorize CareerSource Palm Beach County to serve as the one-stop operator on a time-limited basis and recommends approval from Sept. 30, 2023, through Dec. 31, 2023, or until another qualified one-stop operator is procured. Approval is contingent on CareerSource Palm Beach meeting all the requirements pertaining to temporary assumption of duties outlined in CareerSource Florida Administrative Policy 110.

2. CareerSource Escarosa submitted a request to FloridaCommerce on Aug. 7, 2023, requesting a three-month extension to serve as the one-stop operator to conduct a competitive procurement pursuant to 20 CFR 678.605 and 678.615(a). The current approval will expire on Sept. 30, 2023.

A Request for Proposal was issued by a third party, the Florida Workforce Development Association, on June 27, 2023. The deadline to submit proposals was July 27, 2023. CareerSource Escarosa submitted a proposal to serve as the one-stop operator. The CareerSource Escarosa Board of Directors will meet on Sept. 7, 2023, to vote on the Florida Workforce Development Association's recommendation for CareerSource Escarosa to serve as the one-stop operator. Subsequent to the CareerSource Escarosa's Board of Directors meeting, the designated chief local elected officials will meet to vote on the recommendation.

FloridaCommerce recommends the CareerSource Florida Board of Directors authorize CareerSource Escarosa to serve as the one-stop operator on a time-limited basis and recommends approval from Sept. 30, 2023, through Dec. 31, 2023, or until another qualified one-stop operator is procured. Approval is contingent on CareerSource Escarosa meeting all the requirements pertaining to temporary assumption of duties outlined in CareerSource Florida Administrative Policy 110.

3. CareerSource South Florida submitted a request to FloridaCommerce on Aug. 15, 2023, requesting a three-month extension to serve as the one-stop operator to

conduct a competitive procurement pursuant to 20 CFR 678.605 and 678.615(a). The current approval will expire on Sept. 30, 2023.

CareerSource South Florida released a Request for Proposal on June 5, 2023, for a one-stop operator that yielded no respondents. As a result, CareerSource South Florida re-released a second Request for Proposals on July 27, 2023. To date, CareerSource South Florida has received clarification requests from two potential respondents concerning this second release. Because of these factors, CareerSource South Florida may be able to conduct a sole source procurement and contract with one or more of the interested parties. If unsuccessful in directly contracting with a one-stop operator, CareerSource South Florida will engage a third party to conduct a competitive procurement to allow CareerSource South Florida to compete.

FloridaCommerce recommends the CareerSource Florida Board of Directors authorize CareerSource South Florida to serve as the one-stop operator on a time-limited basis and recommends approval from Sept. 30, 2023, through Dec. 31, 2023, or until another qualified one-stop operator is procured. Approval is contingent on CareerSource South Florida meeting all the requirements pertaining to temporary assumption of duties outlined in CareerSource Florida Administrative Policy 110.

## **FOR CONSIDERATION**

- **Authorize CareerSource Palm Beach County to serve as a one-stop operator starting Oct. 1, 2023, through Dec. 31, 2023.**
- **Authorize CareerSource Escarosa to serve as a one-stop operator starting Oct. 1, 2023, through Dec. 31, 2023.**
- **Authorize CareerSource South Florida to serve as a one-stop operator starting Oct. 1, 2023, through Dec. 31, 2023.**

### **Supporting Documents**

- **CareerSource Palm Beach County's request for authorization to serve temporarily as the one-stop operator for local workforce development board 21, CareerSource Palm Beach County.**
- **CareerSource Escarosa's request for authorization to serve temporarily as the one-stop operator for local workforce development board 1, CareerSource Escarosa.**
- **CareerSource South Florida's request for authorization to serve temporarily as the one-stop operator for local workforce development board 23, CareerSource South Florida.**



**Kathaleen Cole**  
Board Chair

**Marcus L. McBride, PhD**  
Chief Executive Officer

August 2, 2023

Christa Nelson  
Florida Department of Economic Opportunity  
Caldwell Building  
107 E. Madison Street  
Tallahassee, FL 32399

Dear Ms. Nelson,

On May 15, 2023, CareerSource Escarosa (CSE) requested a three-month (3-month) extension to serve as One-Stop Operator to complete the process of procurement.

On June 27, 2023, a Request for Proposals (RFP) was issued by a third party, Florida Workforce Development Association, for One-Stop Operator serving CareerSource Escarosa. The deadline to submit proposals was July 27, 2023. CSE submitted a proposal, and was notified by Florida Workforce Development Association on August 1, 2023, of their selection/recommendation for the service of One-Stop Operator serving CareerSource Escarosa for PY 2023-2026. (See attached letter).

CSE's Board of Directors is scheduled to meet on September 7, 2023, to approve Florida Workforce Development Association's recommendation to serve as One-Stop Operator. Further approval from the designated CLEO is expected at their September 7, 2023, or September 21, 2023 meeting.

CSE requests continued service as One-Stop Operator through December 2023, as this will allow all local approval processes to be complete and to submit request for CareerSource Escarosa to be named as a One-Stop Operator to Florida Commerce.

Thank you for your consideration.

Best regards,

A handwritten signature in blue ink that reads "M. McBride".

Marcus L. McBride, PhD  
Chief Executive Officer

Attachment



August 1, 2023

Dear Chairwoman Cole:

The Florida Workforce Development Association has reviewed your proposal for One-Stop Operator (OSO) in accordance with the Workforce Innovation and Opportunity Act (WIOA) sec. 121 (d) (2) (a), which requires the Local Workforce Development Board (LWDB) to competitively select a “one-stop operator” to support the implementation of services with the career center system locally. The One-Stop Operator may be a single entity or multiple entities working together to form a consortium operator.

CareerSource Escarosa was the only application received during this procurement process. CareerSource Escarosa’s proposal passed the technical review and contained the necessary elements required to carry out the functions of One-Stop Operator as outlined in law. It is the recommendation of the Florida Workforce Development to CareerSource Escarosa’s Board of Directors, that CareerSource Escarosa be selected to serve as One-Stop Operator for PY2023-2026 based on the proposal submitted.

This recommendation does not oblige CareerSource Escarosa Board to award a contract, or contracts, nor will the Florida Workforce Development Association be responsible for any costs incurred in the preparation of proposals. All required backup documentation is available upon request.

Sincerely,

A handwritten signature in blue ink that reads "Stacy Campbell-Domineck". The signature is written in a cursive, flowing style.

Stacy Campbell-Domineck, Immediate Past President  
Florida Workforce Development Association



**DATE:** July 28, 2023  
**TO:** FloridaCommerce, Bureau of One-Stop and Program Support  
**FROM:** Julia Dattolo, President and CEO, CareerSource Palm Beach County  
**SUBJECT:** One-Stop Operator Waiver Extension Request

CareerSource Palm Beach County (CSPBC) is requesting a waiver to continue serving as our own One-Stop Operator until December 1, 2023. This waiver extension is required to allow our organization to complete the procurement process for One -Stop Operator. Because we will be bidding to be our own One-Stop Operator; the procurement process was delayed as we worked to ensure necessary firewalls were established.

CareerSource Polk will be conducting all aspects of the procurement process with appropriate guidance from our local area; below is an approximate timeline of procurement milestones. If you have any questions or concerns, please contact Steven Gustafson at [sgustafson@careersourcepbc.com](mailto:sgustafson@careersourcepbc.com).

### TIMETABLE/SCHEDULE OF EVENTS

Listed below is the schedule of events identifying important actions and dates/times by which the actions must be taken or completed. Time is stated in terms of local time (EST) in Bartow, Florida.

Procurement Activity	Date and Time
RFP Issued and Posted	July 28, 2023
Deadline for Submitting Questions	12:00 PM (EST) August 11, 2023
Questions and Answers Posted	12:00 PM (EST) August 14, 2023
<b>Proposal Submission Deadline</b>	<b>No later than 4:00 PM EST) August 28, 2023</b>
CSPBC Board Approval	October 19, 2023
Notify Approved Bidder	On or about October 27, 2023
Contract Execution	On or about November 3, 2023
Provision of Services Begins	December 1, 2023

cc: Steven Gustafson  
Sharon Brea  
Mary Mullen-Butler



To: Florida Commerce, Bureau of One-Stop and Program Support

From: Rick Beasley, Executive Director, CareerSource South Florida *RB*

Date: August 15, 2023

Re: One-Stop Operator Waiver Extension Request

CareerSource South Florida (CSSF) is requesting an extension to the current temporary authorization to serve as the One-Stop Operator for Local Workforce Development Area 23 until December 30, 2023. This waiver extension is required to allow our organization to complete a sole source and/or third competitive procurement process for One-Stop Operator.

CSSF released a Request for Proposal on June 5, 2023 for a One-stop Operator that yield no respondents. As a result of which, CSSF re-released a second Request for Proposals on July 27, 2023. CSSF hosted an Offeror's Conference for the first proposal on July 7, 2023 with four potential respondents in attendance. CSSF will host another Offer's Conference for the second release on August 15, 2023. To date, CSSF has received clarification request from two potential respondents concerning this second release. Because of these factors, CSSF believes that if granted permission to conduct a sole source procurement, the board will be able to successfully contract with one or more of the interested parties.

In the unlikely event, that CSSF is unsuccessful in directly contracting with a One-Stop Operator, the extension will allow enough time for CSSF to request another workforce board to conduct the procurement process on our behalf. This will allow CSSF the opportunity to compete in the competitive process as outline in Administrative Policy 097.

#### TIME TABLE/SCHEDULE OF EVENTS

RFP Released	July 27, 2023
Offeror's Conference	August 15, 2023
Deadline for Receipt of Proposals	August 28, 2023
Public review Forum	August 31, 2023
Board Approval	September 14, 2023
Execution of Contract	September 14, 2023

#### Sole Source Procurement

Failure of Current RFP process for no responses	August 29, 2023
One-Stop Operator inquires with identified agencies	August 30 – September 13, 2023
Board Approval	September 14, 2023
Execution of Contract	September 14, 2023

info@careersourcesfl.com

7300 Corporate Center Drive, Suite 500  
Miami, Florida 33126

p: 305-594-7615 | f: 305-470-5629



Competitive Process by another Workforce Board

RFP Coordination	September 14 – September 29, 2023
RFP Release	October 16, 2023 (Tentative)
Offeror's Conference/Questions	November 1, 2023
Deadline for Receipt of Proposals	November 15, 2023
Notification of selected provider	November 30, 2023
Board Approval	December 21, 2023
Execution of Contract	December 29, 2023

Pc: Robert Smith, Special Projects Administrator II, SFWIB/CSSF  
Central File, SFWIB/CSSF

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## Consent Item 7

### **WORKFORCE INNOVATION AND OPPORTUNITY ACT LOCAL WORKFORCE DEVELOPMENT BOARD TWO-YEAR (2023-2024) PLAN MODIFICATION APPROVAL**

The Workforce Innovation and Opportunity Act requires each local workforce development board to develop and deliver to the state a four-year plan. These plans must be submitted in partnership with the local chief elected official.

Regulations require state and local workforce development boards to regularly revisit and recalibrate state plan strategies in response to changing economic conditions and workforce needs of the state (20 CFR, Unified and Combined Plans Under Title I of Workforce Innovation and Opportunity Act, §676.135), culminating in a plan modification biennially. CareerSource Florida issued local plan modification instructions to the local workforce development boards on May 25, 2022. Plans were due to CareerSource Florida and FloridaCommerce on Oct. 13, 2022. The local plans were reviewed by FloridaCommerce.

On June 7, 2023, CareerSource Florida and FloridaCommerce recommended conditional approval of the local plan modifications for CareerSource North Central Florida through June 30, 2023, contingent on receipt of additional information or approval signatures required. FloridaCommerce subsequently received signed Memoranda of Understanding from CareerSource North Central Florida.

CareerSource Florida and FloridaCommerce recommend full approval of CareerSource North Central Florida's Workforce Innovation and Opportunity Act Local Workforce Development Board Two-Year (2023-2024) Plan Modification.

### **FOR CONSIDERATION**

- **Approve the [Workforce Innovation and Opportunity Act Local Workforce Development Board Two-Year Plan Modification for CareerSource North Central Florida](#).**

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## Consent Item 8

### DELIVERY OF AN ADDITION TO THE 2023-2024 MASTER CREDENTIALS LIST TO THE STATE BOARD OF EDUCATION

The Reimagining Education and Career Help (REACH) Act amended Chapter 445.004, Florida Statutes, and requires the Florida Credentials Review Committee to define Credentials of Value and make recommendations for these credentials to be added to a state-approved Master Credentials List. The Credentials Review Committee is also charged with establishing a process for quarterly review and approval of credential applications.

In December 2022, the Credentials Review Committee approved the definition for Credentials of Value and a Framework of Quality by which these credentials would be evaluated. This [Framework of Quality](#) is used to evaluate credentials for inclusion on the Master Credentials List.

In February 2022, an online application for credentials seeking inclusion on the Master Credentials List was made publicly available and the Credentials Review Committee established application deadlines supporting a quarterly review and approval of applications. Applications received by June 30, 2023, were evaluated using the Framework of Quality for consideration for the Master Credentials List. Credentials seeking eligibility for Career and Professional Education (CAPE) funding were further evaluated against the Florida Department of Education's criteria for CAPE consideration. A total of 18 applications representing 15 unique credentials were received by June 30, 2023. A summary of the applications received is described below:

- Two applications were for credentials currently on the Master Credentials List and no evaluation was required.
- Six applications were for credentials currently on the Master Credentials List that were seeking CAPE post-secondary funding eligibility.
- Seven applications were for credentials not currently on the Master Credentials List.

Evaluation of applications was conducted by an interagency team of subject matter experts from FloridaCommerce, the Florida Department of Education and CareerSource Florida. Each credential is evaluated against the Framework of Quality and, if applicable, the eligibility requirements for CAPE funding established by the Florida Department of Education. The results of this evaluation are as follows:

- One credential was recommended for addition to the Master Credentials List.

The Credentials Review Committee met on Sept. 6, 2023, and approved the addition of the one credential to the Master Credentials List.

## **FOR CONSIDERATION**

- **Approve delivery to the Florida State Board of Education of one addition to the 2023-2024 Master Credentials List as approved by the Florida Credentials Review Committee at the Sept. 6, 2023, meeting.**
- **Authorize the CareerSource Florida team in collaboration with the Florida Department of Education staff to make technical revisions to approved certifications. This does not include authority to amend or add certifications to the approved list.**

## **ATTACHMENTS**

- [Framework of Quality](#)
- **Addition to the 2023-2024 Master Credentials List**

**2023-2024 Master Credentials List Recommended Additions**  
**June 30, 2023 Applications: Industry Certifications**

FDOE Certification Code	Certification Title	Certifying Agency Name	Eligible for CAPE Funding?	Eligible for Post-Secondary CAPE Funding?	Degree / Non Degree Designation	SOC Code Linkage(s)	Major SOC Code	Major SOC Title	Pass Demand Criteria	Pass Wage Criteria
	CIW AI Data Science Specialist	Certification Partners, LLC (CIW)	Yes	No	Non Degree	15-1299; 15-2051; 15-2099	15-0000	Computer and Mathematical Occupations	Yes	Yes

# FLORIDA WORKFORCE SYSTEM TRANSFORMATION PLAN OVERVIEW

The Florida Workforce System Transformation Plan streamlines and modernizes the state's workforce system, enhancing alignment and accountability, serving job seekers and businesses more effectively, and improving outcomes for Floridians.

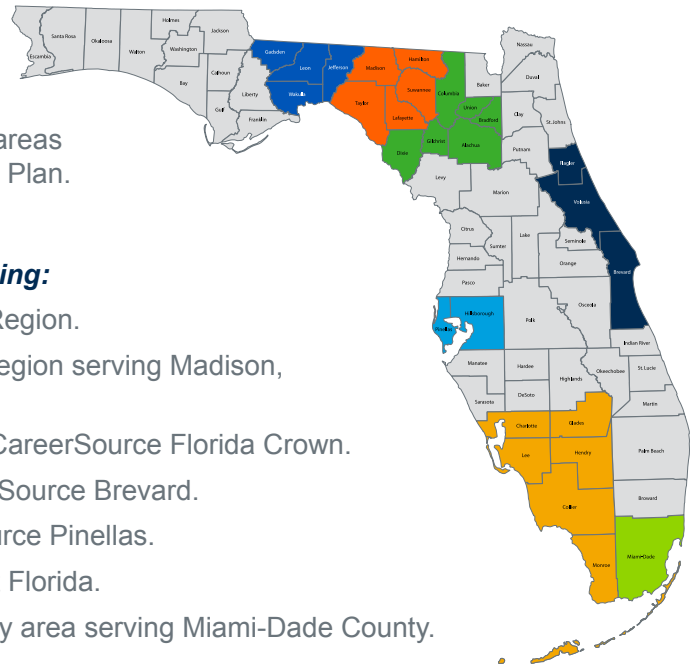
Empowered by the state's landmark Reimagining Education and Career Help (REACH) Act, the plan is focused around three pillars: Alignment and Consolidation, System-wide Improvements and Regional Planning. Implementation currently underway will increase collaboration among economic, educational, and governmental agencies; enhance services to customers to be consistent across the state; use resources more effectively and strengthen the state's economy by supporting regional economies.

## BACKGROUND

A reduction in the number of local workforce development boards was required by the REACH Act to minimize duplication, improve consistency and maximize resources to enhance outcomes for businesses and individuals, emphasizing a customer-focused approach. Extensive feedback and research during an Alignment Evaluation phase in 2022 - 2023 resulted in the CareerSource Florida Board of Directors' approval of two additional transformation strategies – System-wide Improvements and Regional Planning.

## PILLAR I – ALIGNMENT AND CONSOLIDATION

In May 2023, the Governor affirmed the recommendation provided by the CareerSource Florida Board of Directors to realign and consolidate 10 local workforce development areas as outlined in the Florida Workforce System Transformation Plan. These changes will affect 27 counties.



### *Alignment and consolidation actions include the following:*

- ▶ Realign Jefferson County with CareerSource Capital Region.
- ▶ Realign CareerSource North Florida as a five-county region serving Madison, Taylor, Lafayette, Hamilton and Suwannee counties.
- ▶ Consolidate CareerSource North Central Florida and CareerSource Florida Crown.
- ▶ Consolidate CareerSource Flagler Volusia and CareerSource Brevard.
- ▶ Consolidate CareerSource Tampa Bay and CareerSource Pinellas.
- ▶ Realign Monroe County with CareerSource Southwest Florida.
- ▶ Realign CareerSource South Florida as a single-county area serving Miami-Dade County.

By June 30, 2024, significant local actions will have been taken to ensure Florida has transitioned to 21 local workforce development areas and boards. This will include:

- New local governance determined and in place across impacted boards.
- Interlocal agreements, consortiums, and new organizational structures that may reflect 501(c)(3) filings to establish nonprofits or other administrative structures such as governmental entities.
- Operational transitions underway for all impacted boards.

## **PILLAR II – SYSTEM-WIDE IMPROVEMENTS**

The Florida Workforce System Transformation Plan provides an unprecedented opportunity to combine strategic local workforce development board alignment changes with statewide and state-level improvements in policy and operations.

These system-wide improvements will enhance consistency and coordination between local workforce development boards and state workforce partners, including CareerSource Florida, the Florida Department of Commerce and the Florida Department of Education. Consistency system-wide will help streamline experiences for job seekers, workers, and businesses, allowing a more agile workforce system to better adapt to changing marketplace and consumer expectations.

By June 30, 2024, significant improvements in policies, processes, technology and tools will have been made and will be ongoing in alignment with the workforce system's commitment to continuous improvement. These enhancements, applied operationally across Florida's workforce development system, include, but are not limited to, standardized contracts and processes as well as cost savings achieved through leveraging state buying power.

## **PILLAR III – REGIONAL PLANNING**

The Workforce Innovation and Opportunity Act encourages the development of regional plans to align workforce development activities and resources with larger regional economic development areas and available resources to provide coordinated and efficient services to both job seekers and employers. The goal of regional planning is to develop, align and integrate strategies and resources to support regional economic growth.

As part of Florida Workforce System Transformation Plan implementation, regional planning areas will be developed to include a minimum of two contiguous local workforce development areas, ensuring increased collaboration and productivity.

The Regional Planning Area Policy will be presented to the state workforce development board for approval in September 2023, with the request for initial regional planning area designation submitted to the state workforce development board for approval and recommendation to the Governor in December 2023. By June 30, 2024, at least two regional planning areas will be identified, structured, and compliant with regional planning requirements.

# FLORIDA WORKFORCE SYSTEM TRANSFORMATION

The [Florida Workforce System Transformation Plan](#) is the first major modernization effort for the state workforce system in nearly 30 years. The plan streamlines and modernizes the state's workforce system, enhancing alignment and accountability, serving job seekers and businesses more effectively, and improving outcomes for Floridians.

Empowered by the state's landmark Reimagining Education and Career Help (REACH) Act, the plan is focused around three pillars: Alignment and Consolidation, System-wide Improvements and Regional Planning. Implementation currently underway will increase collaboration among economic, educational, and governmental agencies; enhance services to customers to be consistent across the state; use resources more effectively; and strengthen the state's economy by supporting regional economies.

## ROLE OF LOCAL ELECTED OFFICIALS

CareerSource Florida is committed to providing comprehensive assistance to elected leaders in creating positive outcomes for job seekers and businesses. Goals include:

- ▶ Creating a Workforce Innovation and Opportunity Act (WIOA) compliant governance structure for the receipt and administration of federal funds.
- ▶ Reducing administrative redundancies.
- ▶ Equitable and appropriate representation of counties, regardless of population size.
- ▶ Stronger community bonds that create additional partnerships and resources.
- ▶ Greater opportunities for job seekers and businesses in both small and large counties.

County leaders in areas being realigned or consolidated will lead the process of creating new local workforce development boards with support from CareerSource Florida and its contractor, Ernst & Young (EY), and the Florida Department of Commerce (FloridaCommerce). EY will work one-on-one to help develop a strategy and approach, and create solutions tailored to each area.

## ROLE OF LOCAL WORKFORCE DEVELOPMENT BOARDS

Local workforce development boards will be integral to the workforce system transformation process in the newly aligned areas. Goals for the newly established local boards include:

- ▶ Establishing service strategies for the newly designated areas that ensure positive outcomes for job seekers and businesses.
- ▶ Identifying best practices that can be scaled across the newly designated area.
- ▶ Administering the federal grants designated for the new area.

With support from CareerSource Florida, its contractor, EY, and FloridaCommerce, local workforce development boards will work with local elected officials to consolidate or realign local workforce development areas where needed, assist in identifying and implementing system-wide improvements and create regional planning areas while maintaining a strong, localized approach to service delivery.



For more information, please visit [careersourceflorida.com/reachact](https://careersourceflorida.com/reachact).



Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

# Action Item 1

## **CAREERSOURCE FLORIDA STRATEGIC POLICY REGIONAL PLANNING AREAS**

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida’s WIOA State Plan describes Florida’s strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state; are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses the evolving needs of Florida’s economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and access to a more integrated workforce and education system for all Floridians. The law takes an integrated, collaborative approach to strengthen partnerships and enhance access to education, training and employment opportunities within and across key workforce, education and support services systems that are the backbone of Florida’s comprehensive workforce development ecosystem.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to and provide excellent customer service for Florida’s workforce; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

The REACH Act amended Chapter 445, Florida Statutes. One key change introduced by the REACH Act was the creation of Section 445.006(4), Florida Statutes, which authorized FloridaCommerce to prepare a federal waiver to be submitted by the Governor to the U.S. Department of Labor that allows the CareerSource Florida Board of Directors to fulfill the roles

and responsibilities of local workforce development boards or reduce the number of local workforce development boards based on population size and commuting patterns in order to:

- Eliminate multiple layers of administrative entities to improve coordination of the workforce development system.
- Establish consistent eligibility standards across the state to improve the accountability of workforce-related programs.
- Provide greater flexibility in the allocation of resources to maximize the funds directed to training and business services.

Revisions to the REACH Act in Senate Bill 240, signed into law by the Governor on May 15, 2023, further require Regional Planning Areas to establish administrative cost arrangements.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan for accomplishing the REACH Act charge to reduce the number of local workforce development boards while allowing the CareerSource Florida network to modernize and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds.
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

This Regional Planning Area Strategic Policy defines the goals for Regional Planning Areas to include but not be limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers, and significant populations of job seekers.
- Addressing common labor shortages and worker skill gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time, or other).

Additionally, the policy defines the requirements for Regional Planning Areas in Florida.

## **FOR CONSIDERATION**

- **Approve CareerSource Florida Strategic Policy – Regional Planning Areas, implementing the requirements for Regional Planning Areas.**



## Strategic Policy

<b>Title:</b>	Regional Planning Areas Strategic Policy
<b>Adopted:</b>	
<b>Effective:</b>	

### I. PURPOSE AND SCOPE

A Regional Planning Area is made up of two or more local workforce development areas to improve workforce system alignment within larger economic development areas to support economic mobility, growth and prosperity.

The intended goals of establishing Regional Planning Areas across neighboring local workforce development areas include but are not limited to:

- Aligning workforce strategies to address the needs of shared industry sectors, employers and significant populations of job seekers.
- Addressing common labor shortages and worker skills gaps with aligned service strategies.
- Realizing system efficiencies through reducing resource costs (monetary, time or other).

Beyond establishing formal Regional Planning Areas as defined in this policy, local workforce development areas are encouraged to engage in other partnership opportunities with the broader CareerSource Florida network that achieves these goals.

### II. BACKGROUND

Public Law 113 – 128, The Workforce Innovation and Opportunity Act (WIOA), requires the state workforce development board to assist the Governor in developing, implementing and modifying a State Workforce Development Plan. Florida's WIOA State Plan describes Florida's strategy for supporting the publicly funded workforce system. WIOA Section 106 describes the process by which the Governor designates local workforce development areas within the state. Local areas are designated consistent with labor market areas in the state;

are consistent with regional economic development areas in the state; and have available the federal and non-federal resources necessary to effectively administer WIOA activities including whether the areas have the appropriate education and training providers such as institutions of higher education and area career and technical education schools.

The Reimagining Education and Career Help (REACH) Act was signed into law in June 2021. The REACH Act addresses the evolving needs of Florida's economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and access to a more integrated workforce and education system for all Floridians. The law takes an integrated, collaborative approach to strengthen partnerships and enhance access to education, training and employment opportunities within and across key workforce, education and support services systems that are the backbone of Florida's comprehensive workforce development ecosystem.

In December 2021, the CareerSource Florida Board of Directors approved CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy. This strategic policy encourages local workforce development boards to use all allowable resources and to collaborate with all partners to develop innovative strategies that create simplified access to Florida's workforce system and provide excellent customer service for Florida's job seekers and businesses; focus on continuous improvement, strengthen partnerships to leverage shared resources and eliminate duplication of services; align programs and resources to meet local market demand in occupations that lead to self-sustaining jobs; and, implement data-driven accountability measures and quantifiable outcomes related to training programs, employment and services to Florida businesses.

On Feb. 23, 2023, the CareerSource Florida Board of Directors approved the Florida Workforce System Transformation Plan, a three-pillar plan directing the CareerSource Florida network to modernize the local workforce development board governance structure in the nation's third-largest state and better position the system to be more customer-centered, cost effective and responsive to meet workforce talent demands. The plan focuses on:

- Alignment and consolidation for local workforce development boards.
- System-wide improvements for improved customer consistency and better leveraging of public funds; and
- Regional planning to further promote workforce system alignment with education and economic development and optimize opportunities for regional growth.

The Governor subsequently affirmed the CareerSource Florida Board of Directors' recommendation to realign and consolidate local workforce development areas as outlined in the Florida Workforce System Transformation Plan.

### **III. POLICIES AND PROCEDURES**

The Florida Workforce System Transformation Plan directs the CareerSource Florida network to establish Regional Planning Areas. The requirements for Regional Planning Areas in this policy are established by WIOA, Florida law, and actions by the CareerSource Florida Board of Directors.

CareerSource Florida, in collaboration with the Governor's REACH Office, FloridaCommerce and local workforce development boards, shall develop recommendations to the Governor and state workforce development board for the designation of Regional Planning Areas for the state. Local workforce development boards may request designation as a Regional Planning Area by submitting the request and supporting documentation to the state workforce development board for consideration.

The state, after consultation with local workforce development boards and chief local elected officials for the Regional Planning Area, shall require the local workforce development boards and chief local elected officials within a planning region to include the shared Regional Planning Area objectives, activities, and performance elements as a regional addendum to each local workforce development board's WIOA local plan. The state shall provide technical assistance and labor market data, as requested by local areas, to assist with such regional planning and subsequent service delivery efforts.

Regional Planning Area and local WIOA plans must align with Florida's WIOA Statewide Plan.

#### **Requirements for Regional Planning Areas:**

- Each local workforce development area must be part of a Regional Planning Area.
- Regional Planning Areas must include, at a minimum, two contiguous local workforce development areas within Florida.
- Regional Planning Areas shall have relevant relationships as evidenced by population centers, commuting patterns, industrial composition, location quotients, labor force conditions and geographic boundaries.
- Regional Planning Areas shall establish a shared regional service strategy with a defined goal.
- Regional planning areas shall establish administrative cost arrangements across local workforce development areas. Acceptable examples of administrative cost arrangements include but are not limited to shared staff, technology systems, or back-end administrative support tools.
- Chief Local Elected Officials in a new regional planning area **MUST** participate in the regional planning process that results in the inclusion of the shared regional objectives and initiatives as an addendum to each local workforce development board's WIOA plan.
- The regional plan must include a description of activities that result in the following items:
  - Establishment of regional service strategies using cooperative service delivery agreements that include but are not limited to:
    - Consistent eligibility standards and enrollment processes.
    - Common training and coordination of supportive service offerings.
    - Common technology tools and sharing of data within tools outside of Employ Florida.
  - Development and implementation of sector strategies for in-demand sectors or occupations.

- Collection and analysis of regional labor market data.
- Coordination of supportive services.
- Coordination of services with regional economic development services and providers.
- Establishment of agreement concerning how the regional planning area will collectively negotiate performance for the local workforce development areas or the planning region.

#### **IV. AUTHORITIES**

[Public Law 113-128, The Workforce Innovation and Opportunity Act \(WIOA\)](#)

[Chapter 445.003 – 445.007, Florida Statutes](#)

[Chapter 2021-164, Laws of Florida, The Reimagining Education and Career Help Act](#)

[CareerSource Florida Strategic Policy 2000.08.15.I.8D -- Certification of Local Workforce Development Boards](#)

[CareerSource Florida Strategic Policy 2020.02.20.A.1 – Board Governance and Leadership](#)

[CareerSource Florida Administrative Policy 094 – Local Workforce Development Area Designation](#)

[Consolidated Action Item – Reimagining Florida’s Workforce System](#)

#### **V. RESOURCES**

[Reimagining Florida’s Workforce System: A Three-Pillar Plan for Transformation](#)

[Future State Options Report](#)

[Background Research and Analysis Report](#)

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Action Item 2**

### **CAREERSOURCE FLORIDA STRATEGIC POLICY EDUCATION AND INDUSTRY CONSORTIUMS**

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended Section 445.007, Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

This policy requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members from a list of criteria described in the policy.

Local education and industry consortiums will meet quarterly to discuss both the needs of local businesses and the associated educational offerings in the local areas. The consortium will provide a quarterly report to the local workforce development board to inform the local board on programs, services and partnerships in the service delivery area.

Local education and industry consortium reports will be published on local workforce development board websites and made available to the public.

The policy defines the requirements for consortium membership and quarterly reporting.

### **FOR CONSIDERATION**

- **Approve CareerSource Florida Strategic Policy – Education and Industry Consortiums, implementing the requirements established in Senate Bill 240, signed into law May 15, 2023.**



<b>Title:</b>	<b>Education and Industry Consortiums</b>
<b>Adopted:</b>	
<b>Effective:</b>	

**I. PURPOSE AND SCOPE**

Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

This policy requires local workforce development boards to appoint education and industry consortiums composed of local leaders who provide independent information from stakeholders in their local area. Local workforce development boards shall consider this information in creating strategies and local plans that describe efforts to provide educational and workforce opportunities to businesses and job seekers. The goal is to align educational programming with industry needs at the local level.

This policy applies to local education and industry consortiums and the local workforce development boards that appoint them. Education and industry consortiums act as independent advisory groups. Members do not have any direct or implied authority over local workforce development boards, their membership or employees.

**II. BACKGROUND**

Signed into law May 15, 2023, Senate Bill 240, an act relating to education, amended section 445.007(15), Florida Statutes, requiring each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area.

CareerSource Florida surveyed local workforce development boards and education institutions to determine what ongoing activities existed and obtain information and recommendations from local education and industry stakeholders about the availability of education, employment and



training opportunities available to businesses and job seekers in local workforce development areas.

A workgroup was convened to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The goal for these consortia is for the local workforce development board to obtain local community-based information related to educational programs and industry needs and provide that information to local workforce development boards to inform programs, services and partnerships in the service delivery area. This approach ensures local workforce development boards are informed about the current workforce and talent needs of their targeted industries and existing educational and training offerings. This approach also affords businesses the opportunity to closely collaborate with workforce and education stakeholders to eliminate barriers and identify innovative talent pipeline opportunities like work-based learning experiences, internships, preapprenticeship, registered apprenticeship, on-the-job training, customized training, Incumbent Worker Training and other training opportunities.

The workgroup, which included stakeholders from education, business, state government and local workforce development boards, met six times and made recommendations informing the strategic policy elements listed below.

### **III. POLICY**

#### **Required Membership**

Each local workforce development board shall create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

#### Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

#### Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District Technical Colleges
  - State Colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

## Meetings

Each education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area must meet at least quarterly. The local workforce development board will ensure that administrative support is provided to the consortium as needed and will be specifically responsible for the following:

- Maintaining a roster of consortium members and posting the current roster on the local workforce development board website.
- Posting scheduled consortium meetings on the local workforce development board website.
- Posting the quarterly reports from each meeting on the local workforce development website.

It is not required that consortium meetings be separately conducted from existing, similar meetings in the local area. Consortium meetings' discussions need only focus on the local labor market needs including:

1. Industry representatives sharing their specific talent development needs or observations on talent in the local area.
2. Education representatives sharing what specific education offerings are available in the local area.

## Reports

Education and industry consortiums in each local area shall provide quarterly reports to the applicable local workforce development board (and locally designated areas) which provide community-based information related to educational programs and industry needs to inform the local workforce development board on programs, services, and partnerships in the service delivery area.

Quarterly reports shall include:

- A record of the consortium members in attendance.
- A summary analysis of the local labor market based on industry representative needs and education offerings.
- Information on priority industry sectors and occupations for the local area.
- Information on the status of existing talent pipelines for in-demand occupations and the need to expand or leverage existing and/or new resources.

Local workforce development boards are encouraged to consider information obtained from the education and industry consortium to determine effective ways to grow, retain and attract talent to the service delivery area.

As noted above, quarterly education and industry consortium reports shall be published on the local workforce development board's website. Links to education and industry consortium reports and rosters shall be included in each local workforce development board's Workforce Innovation and Opportunity Act local plan.

## IV. AUTHORITY

[Public Law 113-128, Workforce Innovation and Opportunity Act \(2014\)](#)

[Chapter 445.004, Florida Statutes](#)

[Chapter 445.007, Florida Statutes](#)

## **V. ATTACHMENTS**

Consortium Member Appointment Letter Template

Consortium Roster Matrix Template

Quarterly Report Template

Board Logo

*Board Chair*

*President & CEO/  
Executive Director*

[Date]

[Appointee name]

[Position]

[Organization]

[Address]

Dear [appointee name]:

Thank you for volunteering to serve on the [name of education and industry consortium].

Section 445.007, Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area. Local consortiums are required to meet quarterly and provide reports to the local workforce development board that includes community-based information related to educational programs and industry needs. Consortium reports inform the local workforce development board and staff on programs, services and partnerships in the service delivery area.

The relationship between industry and education is vital to the state and local workforce development system. I am confident your representation on this consortium will enhance communication and help ensure the local workforce development board has access to independent and actionable information to enhance workforce opportunities to businesses and job seekers in our local area.

Information about the role of education and industry consortiums is available in the statewide strategic policy [insert link].

Your appointment to the consortium is effective [Jan. 1 or other date if interim appointment is made] and concludes on Dec. 31, [2025]. Thank you again for offering your time, talent and energy to this important initiative. If you have any questions, please do not hesitate to contact [insert local contact].

Sincerely,

[Name]

[Chair]

[Local workforce development board]

cc: [President/CEO, local workforce development board]  
[Senior staff responsible for maintaining consortium rosters]

[Add LWDB Footer]

# [Local Workforce Development Board] [NAME OF EDUCATION AND INDUSTRY CONSORTIUM] ROSTER

## GENERAL INFORMATION

Section 445.007 (15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

The chair of the local workforce development board shall appoint the consortium members. A member of a local workforce development board shall not serve as a member of the consortium. Consortium members shall be appointed for two-year terms beginning on Jan. 1 of the year of the appointment, and any vacancy on the consortium must be filled for the remainder of the unexpired term in the same manner as the original appointment.

The membership of the education and industry consortium must meet the following requirements:

### Industry Representative Requirements:

- Chief Executive Officers or presidents or other executive level staff from the top public and private employers in the local area.
- Industry representatives should reflect the priority industries in the local area.

### Education Representative Requirements:

- Superintendents, presidents, or other leadership staff from education institutions in the local area that represent both public and private education entities in:
  - K-12 education
  - District technical colleges
  - State colleges
  - Universities
  - Other degree or credential granting institutions in the local area

If a member of the education and industry consortium is unable to attend a meeting, a designee from the members' executive team may attend.

Chair of consortium: \_\_\_\_\_

Contact information: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Board contact: \_\_\_\_\_

Date: \_\_\_\_\_

## CONSORTIUM ROSTER

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

NAME	TITLE	ORGANIZATION NAME	INDUSTRY (For Business Partners Only)	PHONE NUMBER	EMAIL ADDRESS	TERM START DATE	TERM END DATE	CONSORTIUM SEAT FILLED

# [Local Workforce Development Board] [Name of EDUCATION AND INDUSTRY CONSORTIUM] QUARTERLY REPORT

## A. GENERAL INFORMATION

Report quarter: \_\_\_\_\_

Date of meeting: \_\_\_\_\_

Report prepared by: \_\_\_\_\_

Local workforce development board contact: \_\_\_\_\_ Date: \_\_\_\_\_

## B. ATTENDANCE

Name	Organization	Industry or Education Organization	Contact Information





## B. SUMMARY REPORT

1. Summary analysis of the local labor market based on the industry representative needs and education offerings. (Provide summary)
2. Information on priority industry sectors and occupations for the local area. (Provide summary)
3. Information on the status of existing talent pipelines for in-demand occupations. (Provide summary)

Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Action Item 3**

### **CAREERSOURCE FLORIDA ADMINISTRATIVE POLICY – ELIGIBLE TRAINING PROVIDERS LIST**

Public Law 113-128, the Workforce Innovation and Opportunity Act (WIOA), Section 122, requires the Governor, through the state workforce development board, to establish criteria, information requirements and procedures to determine the eligibility of providers of training services in the state. The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance and continuous improvement.

The Reimagining Education and Career Help (REACH) Act charges FloridaCommerce with establishing WIOA eligible training provider criteria focused on participant outcomes. The quality and selection of providers and training services programs is vital to achieving these core principles.

The CareerSource Florida Administrative Policy 090 – WIOA Eligible Training Providers List provides guidance to local workforce development boards about the Eligible Training Providers List and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers, including in-state and out-of-local-area and out-of-state providers and programs of study.

This policy describes the state policy on enforcement of Eligible Training Providers including denials, deactivation, removal, loss of eligibility, re-application, and the appeals process for local workforce development boards and providers.

This policy is being revised to conform to requirements established by the U.S. Department of Labor, the REACH Act, and to implement a critical system-wide improvement as part of the Florida Workforce System Transformation Plan approved by the CareerSource Florida Board of Directors in February 2023.

### **FOR CONSIDERATION**

- **Approve revisions to CareerSource Florida Administrative Policy 090 – Eligible Training Providers List.**



**POLICY  
NUMBER  
090**

## **Administrative Policy**

<b>Title:</b>	Eligible Training Providers List Requirements		
<b>Program:</b>	Workforce Innovation and Opportunity Act		
<b>Effective:</b>	3/1/2016	<b>Revised:</b>	TBD

### **I. PURPOSE AND SCOPE**

The purpose of this policy is to provide guidance to local workforce development boards (LWDBs) on the Eligible Training Provider List (ETPL) and related federal and state requirements, performance standards, data reporting, and procedures for determining initial and continued eligibility of training providers and programs of study.

### **II. BACKGROUND**

Workforce Innovation and Opportunity Act (WIOA) Title I training can be provided through a variety of contract mechanisms, or it may be funded through an Individual Training Account (ITA) that is used to purchase training from an Eligible Training Provider (ETP). ETPs are postsecondary providers of training services that are eligible to receive funds from LWDBs as prescribed in Section 133(b) of WIOA. The ETPL is mandated by Section 122 of WIOA, which requires the Governor, through the state workforce development board, CareerSource Florida, Inc., to establish criteria, information requirements, and procedures on the eligibility of training providers of training services in the state. Additionally, Florida's 2021 Reimagining Education and Career Help (REACH) Act charges the Florida Department of Commerce (FloridaCommerce) with establishing ETP criteria focused on participant outcomes.

The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance, and continuous improvement. The quality and selection of training providers and programs of study are vital to achieving these core principles.

### **III. AUTHORITY**

Workforce Innovation and Opportunity Act of 2014, Public Law 113-128

20 Code of Federal Regulations (CFR) 680.400 et seq., Subpart D – Eligible Training Providers

Training and Employment Guidance Letter (TEGL) No. 8-19 and TEGL No. 8-19, Change 1

TEGL No. 13-16

TEGL No. 3-18

TEGL No. 21-22

Section 445.003(7)(b), Florida Statutes (F.S.)

Section 445.004(4)(h), F.S.

Section 1005.21, F.S.

Section 1008.39, F.S.

### **IV. POLICIES AND PROCEDURES**

An ITA may be used to pay for any allowable type of training if the program of training services (also referred to as a “program of study”) is on the ETPL. ETPs are entities that are eligible to receive WIOA Title I-B funds for adult and dislocated worker participants who enroll in training programs, through ITAs. ITAs may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth, ages 18-24, and in-school youth, ages 16-21.

WIOA requires that each state ensure qualified providers offering a variety of job-driven training programs are available. A training provider must provide a program of study to be included on the ETPL.

#### **A. STATE AND LOCAL ETPL**

FloridaCommerce and the LWDBs must work together to identify ETPs to be included on the state ETPL. LWDBs must select approved training providers from the state ETPL. In addition to the criteria outlined in this policy, LWDBs may add additional requirements for training providers, except registered apprenticeship programs (RAPs), that supplement the criteria and information requirements for an ETP or program of study. This will result in training providers that are on the state

ETPL that may not be eligible for inclusion on the local ETPL; therefore, the local ETPL will be a subset of the state ETPL. LWDBs that do not establish additional requirements through local policy must include all state ETPs on its local ETPL. Note: All ETPs on a local ETPL must first be on the state ETPL.

State and local ETPLs must be maintained in the state's online labor exchange and case management system, Employ Florida. Also, LWDBs must make the state ETPL or their local ETPL, as appropriate, publicly available through their local websites.

## **B. PROVIDER AND PROGRAM ELIGIBILITY UNDER WIOA**

To be eligible to apply for inclusion on the ETPL and to receive training funds under WIOA Section 133(b), the training provider must be one of the following types of entities detailed in 20 CFR 680.410(d):

1. Institutions of higher education such as universities, colleges, or other public or private institutions of higher education that provide programs that lead to a recognized postsecondary credential.
2. RAPs.
3. Other public or private training providers, which may include community-based organizations and joint labor-management organizations.
4. Eligible providers of adult education and literacy activities under WIOA Title II, if these activities are provided in combination with training services as described in 20 CFR 680.350.

Additionally, LWDBs may be included on the ETPL if they meet the conditions of WIOA Section 107(g)(1), which states that authority may be permitted to LWDBs to provide training services pursuant to a request from the LWDB if the local board:

1. Submits a request or an application to FloridaCommerce for approval by the CareerSource Florida Board of Directors, which must include:
  - a. Satisfactory evidence that there is an insufficient number of eligible providers of such a program of training services to meet local demand in the local area;
  - b. Information demonstrating that the LWDB meets the requirements for an eligible provider of training services under WIOA Section 122; and
  - c. Information demonstrating that the program of training services prepares participants for an in-demand industry sector or occupation in the local area; and
2. Makes the proposed request or application available to eligible providers of training services and other interested members of the public for a public comment period of not less than 30 days.

### **C. PROGRAM OF STUDY**

A program of study is a course, class, or structured regimen that provides training leading to:

1. An industry-recognized postsecondary credential, a secondary school diploma, or equivalent;
2. Employment; or
3. Measurable skills gains leading to one of the above.

Training services may be delivered in person, online, or using a blended method or approach. Online training providers may apply and be considered for inclusion on the state and local ETPLs but are required to meet the same eligibility and performance criteria established for classroom-based instruction providers. Training programs must also be made physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, such as persons with disabilities.

ETPs may offer programs of study that include:

1. Occupational skills training including training for non-traditional employment;
2. On-the-Job Training (OJT);
3. Incumbent Worker Training (IWT);
4. Programs that combine workplace training with related instruction, which may include cooperative education programs;
5. Private-sector training programs;
6. Skill upgrading and retraining;
7. Entrepreneurial training;
8. Job readiness training provided in combination with training services or transitional jobs;
9. Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with services provided in the programs listed in numbers 1. through 7., above; and
10. Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

### **D. INITIAL ELIGIBILITY (TRAINING PROVIDERS)**

Initial eligibility for the ETPL applies to all training providers except RAPs registered with the Florida Department of Education (DOE). The training provider must supply verifiable, program-specific performance information pursuant to the criteria established by federal regulations and state statutes under which the provider applies

to become an ETP. The information provided must support the training provider's ability to serve participants.

To meet initial eligibility to be included on the ETPL, a training provider must provide the following:

1. A description of the training or educational institution including the provider's address, email, Federal Employer Identification Number (FEIN), and the name of the contact person;
2. Verification the provider is licensed, certified and/or otherwise authorized under Florida law to provide training services (this applies to in-state and out-of-state providers);
3. A detailed description of each program of training services being submitted for initial eligibility determination;
4. Data supporting the cost of attendance (including, but not limited to, tuition and fees);
5. Verification that the program leads to a credential on the Master Credentials List (MCL) and information on any other associated MCL credentials which can be used as part of a sequence in an individual's career lattice;
6. Whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry);
7. Identification of the in-demand industry sectors and occupations that best fit with the training program;
8. A description of prerequisites, skills, and knowledge required prior to the commencement of the training; and
9. Information related to WIOA performance indicators (employment, median earnings, credentials) other than measurable skills gains.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy.

Training providers seeking initial eligibility determinations should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request has been submitted. When conducting a preliminary review of training provider applications, the LWDB must do so using only the state's criteria. The LWDB should not apply any additional local requirements or criteria during the preliminary review process.



The State ETPL Coordinator will approve or deny the application and notify the training provider of the determination through Employ Florida or the training provider's preferred mode of communication as indicated in the application. If approved, the ETP will be added to the state ETPL.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

Training providers and the programs of study that are approved will receive initial eligibility for one year and will be subject to the continued eligibility requirements subsequent to their initial eligibility period.

#### **E. INITIAL ELIGIBILITY (PROGRAMS OF STUDY)**

A training provider's request for an initial eligibility determination must be accompanied by a request for initial eligibility determination for at least one program of study. A training provider may request initial eligibility determinations for multiple programs of study, but each program of study is reviewed independently. When an ETP with continued eligibility for one or more programs of study requests that a new program of study be added to the ETPL, the new program of study will undergo an initial eligibility determination and may be approved or denied.

Training providers seeking initial eligibility for a program of study should contact an LWDB in the local area or planning region in which they plan to operate. The LWDB will provide the training provider with guidance and assistance with the ETPL application process and requirements, as needed. The LWDB will review the application to ensure documentation requirements are met and notify the State ETPL Coordinator via email at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) that a determination of initial eligibility request for a program of study has been submitted.

All eligibility determinations are made based on the review of required information, which must be submitted through the ETPL portal in Employ Florida, as outlined in **Section IV. I – ETPL Portal** of this policy. The State ETPL Coordinator will approve or deny the program application and notify the training provider of the determination(s) through Employ Florida or the preferred mode of communication indicated in the application for initial eligibility.

Alternatively, training providers may directly contact the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov) to request an initial eligibility determination for one or more programs of study. The State ETPL Coordinator will review the application to ensure that all documentation requirements are met. The State ETPL Coordinator will follow

the aforementioned process for determining eligibility and providing notification to the training provider for approval or denial of the initial eligibility request.

## **F. CONTINUED/SUBSEQUENT ELIGIBILITY**

After a training provider has completed the one-year initial eligibility period, the training provider is required to apply for continued eligibility and recertify their program(s) of study every two years to maintain their eligibility for the ETPL. This process requires submission of performance and cost information for each program of study listed on the state ETPL.

Applications for continued eligibility must be submitted three months prior to the end of their current eligibility period. Training providers applying for continued eligibility of programs of study must log in to the ETPL portal to review and update all required fields and forms for each program of study for which continued eligibility is being sought. If the LWDB is assisting the training provider with their subsequent eligibility, the LWDB will review the program application to ensure all documentation requirements are met and notify the State ETPL Coordinator that a continuing eligibility request has been submitted for the program(s) of study. The State ETPL Coordinator will review all information provided and notify the LWDB and the provider of approval or denial through Employ Florida or the preferred mode of communication outlined in the application.

Each training provider seeking continued eligibility must supply the following information as required by 20 CFR 680.410:

1. Verification the provider is licensed, certified, or otherwise authorized under Florida law (if applicable) to be a provider of training services. This requirement applies to in-state and out-of-state providers.
2. Information reported to state agencies on federal and state training programs other than WIOA Title I-B programs as listed below:
  - a. The total number of persons enrolled in the program;
  - b. The total number of WIOA participants enrolled in the program;
  - c. The total number of persons completing the program;
  - d. The total number of WIOA participants completing the program;
  - e. Quality<sup>1</sup> of the program of study including a program that leads to a recognized postsecondary credential;
  - f. Provider's ability to offer industry-recognized certificates and credentials;
  - g. The total number of persons awarded a Recognized Postsecondary Credential (or other credential, if applicable);

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<sup>1</sup> Florida defines quality as training programs that meet the minimum criteria as defined in this policy as well as programs that develop skills valued by priority industry sectors.

- h. The total number of WIOA participants awarded a Recognized Postsecondary Credential (or other credential, if applicable);
- i. The total number of persons employed after completing the program;
- j. The total number of WIOA participants employed after completing the program;
- k. Data identifying the cost of attendance and costs of tuition and fees for WIOA participants completing the program;
- l. Information on recognized postsecondary credentials (or other credential, if applicable) received by WIOA participants;
- m. Whether the credential can be used in conjunction with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder;
- n. Description of how the provider will ensure access to programs of study throughout the state, including in rural areas, and using technology (as applicable);
- o. Description of provider's ability to provide trainings that are physically and programmatically accessible for individuals who are employed and individuals with barriers to employment, including individuals with disabilities;
- p. Information reported to state agencies with respect to federal and state programs of study (other than the program carried out under WIOA), including one-stop partner programs;
- q. Performance on WIOA performance indicators;
- r. The degree to which programs of study relate to in-demand industry sectors and occupations in the state;
- s. Timeliness and accuracy of ETP's performance reports; and
- t. Any additional factors that are determined appropriate within the parameters of WIOA and statutes.

## **G. REGISTERED APPRENTICESHIP PROGRAMS**

In accordance with the National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.), entities that carry out RAPs are exempt from the initial and continued eligibility requirements described in this policy. RAPs must be included and maintained on the ETPL until:

- 1. The RAP notifies FloridaCommerce it no longer wants to be included on the list;
- 2. The program becomes deregistered under the National Apprenticeship Act;
- 3. The program is determined to have intentionally supplied inaccurate information; or
- 4. A determination is made by FloridaCommerce that the RAP substantially violated any provision of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.

Because RAPs are exempt from all initial and continued eligibility requirements, the LWDBs may not impose additional criteria or information requirements for RAP sponsors except as outlined in Training and Employment Guidance Letter Nos. 08-19 and 08-19, Change 1, and TEGl No. 13-16, Change 1.

A RAP is an ETP if it is registered with DOE, Office of Apprenticeship (OA), or any other state's State Apprenticeship Agency (SAA). Although they are automatically eligible for ETPL inclusion, RAP sponsors seeking to have their apprenticeship programs listed on the ETPL must still "opt-in" by informing the State ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov). RAPs opting-in may be referred to the State ETPL Coordinator by CareerSource Florida, LWDBs, or DOE. If a RAP expresses interest in being on the state ETPL, the ETPL Coordinator must request the RAPs provide the following information:

1. Occupations included in the RAP;
2. The name and address of the RAP sponsor;
3. The name and address of the Related Technical Instruction provider and the location of instruction if different from the program sponsor's address;
4. The method and length of instruction; and
5. The number of active apprentices.

RAPs on the state ETPL must be included on all local ETPLs in the state and shall remain on the ETPLs until removed or upon written request for removal by the RAP sponsor to the ETPL Coordinator at [ETPL@commerce.fl.gov](mailto:ETPL@commerce.fl.gov).

FloridaCommerce will regularly coordinate with USDOL, CareerSource Florida and DOE to ensure that necessary updates are made to any information previously provided by RAP sponsors or training providers. FloridaCommerce will also coordinate with DOE to ensure that RAPs registered with the DOE are made aware that they are eligible for placement on the ETPL, and that DOE is informed when a RAP that is registered with USDOL's OA or another state's SAA contacts FloridaCommerce to opt-in to inclusion on the ETPL.

Apprenticeship programs that are not registered with DOE, OA, or another state's SAA are not considered RAPs and must complete the initial eligibility and continued eligibility procedures. Pre-apprenticeships, including quality registered pre-apprenticeships leading to RAPs, are not automatically approved for inclusion on the ETPL and are not exempt from requirements outlined in this policy. Other programs of training services offered by a RAP sponsor or a RAP's provider of related instruction are likewise not automatically eligible.

## **H. OUT-OF-LOCAL-AREA AND OUT-OF-STATE PROVIDERS**

State policies and procedures may provide for reciprocal or other agreements established with another state to permit the use of ITAs for ETPs in another state. As

such, participants may choose ETPs and programs of study located outside of the state or local area if the program is on the state's ETPL and in accordance with state and local area policies.

Out-of-state postsecondary training institutions that are not operating in Florida are not required to be licensed by the Florida Commission for Independent Education (CIE). However, out-of-state providers must provide the following information:

1. Information needed for initial eligibility or continuing eligibility determination;
2. Evidence that the institution (and applicable programs) is accredited by an accreditation agency approved by the U.S. Department of Education;
3. Evidence that the institution meets the licensing requirements of its home state; and
4. Evidence that the institution is identified as active on the ETPL in its state of origin or native state. To provide performance information for its programs, out-of-state providers are required to report their student completion data to FloridaCommerce under established reporting mechanisms.

Out-of-local area and out-of-state training providers must request an initial eligibility determination for each program of study to be included on the state ETPL. Out-of-state providers must also provide documentation, uploaded to the ETPL portal, which validates the above-referenced criteria. These training providers must contact the state ETPL Coordinator directly to request their initial eligibility and the initial eligibility of their programs of study.

## **I. ETPL Portal**

The state ETPL is managed by FloridaCommerce and maintained in Employ Florida, the state's online labor exchange and case management system. Employ Florida connects employers and job seekers and provides information about training opportunities available in the state, including training program services eligible for funding under WIOA Section 133(b).

The ETPL portal is the platform used to maintain ETPLs and record consumer information, including, but not limited to, cost and performance information for each approved program of study. The ETPL portal is the mechanism used by FloridaCommerce to manage the ETPL process, and by LWDBs and training providers to apply for initial eligibility and re-apply for continued eligibility.

The ETPL portal supports WIOA participants in making informed choices about ETPs and programs of study and allows FloridaCommerce to disseminate state and local ETPLs to employers, training providers, workforce staff, One-Stop career center partners, and the public, including individuals with disabilities and individuals with limited English proficiency. Consumer choice is ensured by making the state and

local ETPLs, accompanied by performance and cost information, widely available and easily accessible. ETPLs must be disseminated in a format that facilitates comparison between programs of study and is searchable, user-friendly, and easily understood by individuals seeking information on training outcomes.

#### **J. PERFORMANCE CRITERIA**

As required by Section 445.003(7)(b), F.S., FloridaCommerce must establish the minimum criteria a training provider must achieve for completion, earnings, and employment rates of eligible participants. Once criteria are established, training providers will be required to meet at least two of the minimum criteria for subsequent eligibility.

Like the RAP exemption from the eligibility requirements, RAPs also are exempt from ETP performance reporting requirements in WIOA Sections 116(d)(4) and 122, including any additional ETP reporting requirements that have been added by the state or local area.

#### **K. ANNUAL REPORTING**

No later than Aug. 31 of each year, training providers must upload information into the ETPL portal on all enrolled and completer individuals for each program of study being considered for continued eligibility. This student data must be submitted each year for each program of study and must include the social security numbers for each enrolled and completer individual to allow for the calculation of minimum performance levels as required in 20 CFR 680.460(g).

The ETPL portal provides a secure solution for the transmission of Personally Identifiable Information (PII). ETPs, excluding RAP sponsors, must upload student data including the social security numbers and completed training of all individuals enrolled during a specific timeframe as determined by policy. Any transmission of PII shall occur in accordance with FloridaCommerce security policies and any disclosure of PII from an education record must be carried out in accordance with the Family Education Rights and Privacy Act (FERPA), including provisions related to prior written consent. As allowed pursuant to 34 CFR 99.31, DOE has designated FloridaCommerce as an authorized representative to enforce or comply with federal legal requirements relating to WIOA.

#### **L. DENIAL, DEACTIVATION, REMOVAL, OR LOSS OF PROVIDER OR PROGRAM ELIGIBILITY**

There are circumstances under which training providers may be denied, deactivated, removed, or lose their eligibility for inclusion on the state ETPL, as outlined below. Prior to approving an ITA for a WIOA-eligible individual, LWDBs must ensure that

training providers and program of study are, or continue to be, included on the ETPL at the time the participant is enrolled in the program of study.

### **(1) Denial**

A program of study that FloridaCommerce determines does not meet the eligibility requirements shall be issued a denial notice within 30 calendar days of FloridaCommerce's receipt of the application. A separate denial notice will be issued for each program of study being denied and will include the reason(s) for denial and provide appeal rights, as applicable.

### **(2) Deactivation**

Once an ETP or program of study is approved, it will remain on the state's ETPL through the continued eligibility period of two years unless removed by FloridaCommerce for documented training provider and/or program of study violations. Training providers or programs of study are subject to deactivation and removal from the ETPL if:

1. FloridaCommerce determines the training provider intentionally supplied inaccurate information or substantially violated any provision of Title I of WIOA regulations, including 29 CFR Part 38;
2. The program of study fails to meet the states' minimum performance levels as required in 20 CFR 680.460(g); or
3. The training provider loses its license or accreditation from its accrediting body.

### **(3) Loss of Eligibility and Removal**

A program of study may be removed from the state ETPL if:

1. The training provider fails to supply participant data required for the performance review by the annual due date of Aug. 31.
2. It is determined that the training provider intentionally supplied inaccurate information or substantially violated any provisions of Title I of WIOA or the WIOA regulations, including 29 CFR part 38.
3. It is determined that the provider is engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence, irresponsibility, misfeasance, malfeasance, gross mismanagement, waste, nonfeasance, or lack of performance.

FloridaCommerce will electronically send a notice of removal from the ETPL to the LWDBs and to the training provider. LWDBs must not issue a participant an ITA for a training provider/program of study that is determined to have lost eligibility for inclusion on the ETPL. If WIOA participants are already enrolled

and have received an ITA for a training provider/program of study that subsequently becomes deactivated or removed from the ETPL, LWDBs may allow enrolled participants to complete the training program; however, no new enrollments may occur. LWDBs must develop local operating procedures to ensure no enrollments are made after the effective date of the notice of removal. Procedures should also include how any existing participants who are enrolled in the program of study will be handled.

#### **(4) Re-application**

Training providers may reapply under the initial eligibility criteria provided in this policy.

### **M. APPEALS**

For an appeal of any decision made at the state level, the appellant shall follow the appeals procedure established by FloridaCommerce. For an appeal of any decision made by an LWDB, the appellant shall follow the appeals procedure established in its local plan by the LWDB making the decision.

### **N. ETPL AND NON-ITA TRAINING SERVICES**

There are exceptions to the required use of the ETPL for ITA-funded training by LWDBs. In the following situations covered by these exceptions, a contract for services between the LWDB and the training provider may be attained and implemented to ensure services are provided instead of selecting a training provider from the state ETPL.

#### **(1) Work-Based Training**

WIOA supports training and work experience for job seekers through work-based training, which is coordinated by LWDBs through collaboration with local employers. These activities, like OJT, Customized Training, and IWT do not require inclusion on the ETPL, in accordance with 20 CFR 680.530. Please see [Administrative Policy 100](#) for additional information on work-based training.

#### **(2) Training Contracts**

A program of study may be provided through training contracts instead of ITAs when there is not sufficient availability of eligible training providers in the local area to accomplish the purpose of an ITA. These contracts may be used for cohort training, per TEGL 21-22, Attachment 1, or in one of the other situations prescribed in 20 CFR 680.320. Because training contracts do not use ITAs, the training provider is not required to be included on the state or local ETPL. The LWDB must have written procedures in place that describe how such a



determination is made and the process for contracting with the training provider(s).

### **(3) Non-WIOA**

The ETPL is a requirement of WIOA and only applies to programs that are supported by WIOA funding. Providers of training services that do not intend to seek WIOA funding do not need to request or pursue ETPL inclusion.

## **V. DEFINITIONS**

- 1. Continued Eligibility:** “Continued Eligibility” or “Subsequent Eligibility” is the eligibility determination that allows training providers to remain on the ETPL until the next eligibility determination.
- 2. Credential:** A WIOA indicator consisting of a recognized postsecondary credential (an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the state involved or federal government, or an associate or baccalaureate degree) or a secondary school diploma, or its recognized equivalent, during participation in or within one year after exit from the program. All credentials must be included on the Master Credentials List and a credential’s inclusion on the Master Credentials List is sufficient to meet the WIOA definition of “credential.”
- 3. Eligible Training Provider (ETP):** A provider of training services or programs of study (as prescribed in 20 CFR 680.410) that has met the eligibility requirements to receive WIOA funds for providing training service programs to eligible individuals.
- 4. Eligible Training Provider List (ETPL):** A statewide or local compilation of ETPs (as prescribed in 20 CFR 680.410) and approved programs of training services or programs of study (as prescribed in 20 CFR 680.420).
- 5. Individual Training Account (ITA):** A payment agreement with an ETP established on behalf of a WIOA participant for a program of training services or programs of study as prescribed in WIOA section 134(c)(3).
- 6. Initial Eligibility:** The initial determination that allows a training provider and approved program of training services or programs of study onto the state or local ETPL for the first year. An established ETP may also request an initial eligibility determination for a new program of study.
- 7. Local ETPL:** A subset of the state ETPL created when LWDBs establish, through local policy, additional requirements for ETPs and programs of study. All ETPs on a local ETPL are also on the state ETPL, maintained in Employ Florida.

8. **Master Credentials List (MCL):** Required by the Reimagining Education and Career Help (REACH) Act, the Master Credentials List is a comprehensive list of state-approved degree and non-degree credentials of value that prepare Floridians for in-demand occupations. Credentials on the list satisfy the criteria set forth by the Florida Credentials Review Committee in the Framework of Quality. Programs of study must be on the MCL to be on the state ETPL.
9. **Personally Identifiable Information (PII):** Information used to distinguish or trace an individual’s identity, either alone or when combined with other personal or identifying information, linked or linkable to a specific individual.
10. **Program of Training Services:** A “Program of Training Services” or “Program of Study” as prescribed in 20 CFR 680.420. Such a program consists of one or more courses or classes, or a structured regimen, leading to one or more of the following: A recognized postsecondary credential, secondary school diploma or its equivalent; employment; or a measurable skills gain toward such a credential or employment.
11. **Registered Apprenticeship Program (RAP):** A program that is registered with the USDOL Office of Apprenticeship (OA) or any State Apprenticeship Agency (SSA) as prescribed in 20 CFR 680.470(a). Florida’s State Apprenticeship Agency is the Florida Department of Education’s Office of Apprenticeship.
12. **Sponsor (of a Registered Apprenticeship Program):** Any person, association, committee, or organization operating an apprenticeship program and in whose name the program is (or is to be) registered or approved.
13. **State ETPL:** A list of all Eligible Training Providers and Programs who have been approved to receive WIOA funding through ITAs. It is maintained by FloridaCommerce within the state’s ETPL MIS portal.
14. **Training Provider:** A university, college, public or private technical or vocational training institution, a private training company or private instructor, or a company employee who is qualified to provide instruction that leads to a recognized postsecondary credential, license, secondary school diploma or equivalent.

**VI. REVISION HISTORY**

Date	Description
3/1/2016	Policy issued by the Florida Department of Economic Opportunity.
TBD	Revised by FloridaCommerce to align with TEGE No. 08-19. Approved by the CareerSource Florida Board of Directors.

# Information Items



## Speakers' Bios

### Marcus McBride, Ph.D.



Marcus L. McBride joined the CareerSource Escarosa team in June 2020 as the chief executive officer. He is a passionate leader who brings a wealth of knowledge from his experience in the public and private sector. McBride holds a Ph.D. in Educational Psychology and Research Methods; Master of Arts in Educational Psychology; and a Bachelor of Science in Human Development and Family Studies, all from the University of Alabama.

Over the past 19 years, McBride has held various roles leading collective efforts to empower others to reach their highest potential. Prior to his current role, he most recently served as director of education and training for Goodwill Industries of the Southern Rivers. McBride enjoys traveling and spending time with his family.

### Keantha Moore



Keantha Moore serves as deputy chief of the Bureau of One-Stop and Program Support at FloridaCommerce. Moore has been part of Florida's workforce development system for 17 years, which started with 10 years of experience at the local workforce development board level. Her local experience ranged from front-line staff person helping to connect job seekers with employment to her culminating role as the director of operational excellence. Moore then transitioned to the FloridaCommerce team where she has served in several leadership capacities over the past seven years.

### Janeth Merchan



Janeth Merchan is a senior manager serving at Ernst & Young LLP (EY) in the People Advisory Services practice within the U.S. Government and Public Sectors. She has assisted federal, state and local agencies with the redesign of their workforce strategy. Over the course of nine years, she has led numerous operating model and organizational transformations, focusing on organizational design including governance and decision rights, and employee skills enablement to understand how work truly gets done.

Merchan has led the implementation of statewide reforms by focusing on change management strategies that put 'people first' at every step of the change to design new models that create simplicity, efficiency, intentional collaboration and a purpose-driven environment. Additionally, she has worked on assessing the state of Tennessee's local workforce development boards for systemwide improvements after the state's realignment of workforce areas in 2018.

## Brian Woods

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Brian Woods is a managing director in the People Advisory Services practice of Ernst & Young LLP (EY). Woods has collaborated with over 100 clients in multiple industries in the design and deployment of innovative, tangible “people” solutions for complex regional, national and global process and technology improvement initiatives. He is an experienced training, organizational change management, communication and talent strategy specialist.

Woods has spent more than 27 years leading major organizational transformation and people experience improvement initiatives. He is currently responsible for the state and local government market for EY’s People Advisory Services practice.