

**Board of Directors Meeting Agenda**  
DECEMBER 12, 2023 • 9:00 – 11:30 A.M., ET  
JOIN THE MEETING VIA MICROSOFT TEAMS: [CLICK HERE](#)  
AUDIO ONLY: [850-629-7293](tel:850-629-7293), ID: [255 074 984#](tel:255-074-984#)

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**Chair's Welcome and Remarks**

***Stephanie Smith***

**Consent Agenda**

1. September 19, 2023, Meeting Minutes
2. October 12, 2023, Executive Committee Meeting Minutes
3. Approval of Casey Penn to serve as the Florida Department of Children and Families Designee
4. Approval of Adrienne Campbell to serve as the Florida Department of Juvenile Justice Designee
5. Approval of Master Credentials List for Delivery to State Board of Education
6. Approval of Request to Temporarily Serve as One Stop Operator for CareerSource South Florida
7. Approval of Request to Serve as One Stop Operator for CareerSource Escarosa and CareerSource Palm Beach County
8. Approval of Request to Serve as Direct Service Provider for CareerSource Escarosa

**Sunshine Law**

***George Levesque***

**President's Report**

***Adrienne Johnston***

**Finance Council Report**

***Bill Johnson***  
*Chair*

**Strategic Policy and Performance Council Report**

***Sophia Eccleston***  
*Chair*

**Action Items**

***Dan McGrew***

1. Apprenticeship Strategic Policy
2. Standardization of Tools and Services Administrative Policy
3. Regional Planning Areas Identification and Requirements Administrative Policy
4. Determination on Appeal of Credentials Review Committee Actions

***Susan Bosse***  
***Keantha Moore***  
***Keantha Moore***

***Dan McGrew***

**Designation of Regional Planning Areas**

***Dan McGrew***

**Florida Workforce System Transformation Update**

***Garrick Wright/EY***

**2024-2028 WIOA Combined State Plan**

***Dan McGrew***

**FloridaCommerce Report**

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



**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**

Joint Informational Council Meetings – January 31, Virtual  
Board of Directors and Council Meetings – February 27-28, 2024, Tallahassee

**Information Items**

# Consent Item 1

## September 19, 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 September 19, 2023, Meeting Minutes, to include any modifications or changes noted by the board.**

**CareerSource Florida  
Board of Directors Meeting Minutes  
September 19, 2023**

**I. Call to Order**

Chair Stephanie Smith called the meeting to order at 8:30 a.m. on September 19, 2023. She introduced CareerSource Florida Program Director Garrick Wright 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  
Bayne Beecher  
Kiley Damone  
Robert Doyle  
Shevaun Harris  
Tim Hinson  
Bill Johnson  
Allison Kinney  
Joe Marino  
Kevin McDonald  
Brent McNeal  
Kevin O’Farrell  
Kimberly Richey  
Robert Salonen  
Brian Sartain  
Les Sims  
Meredith Stanfield  
Rep. Dana Trabulsy

Chair Smith thanked Clement and recognized Governor DeSantis’ appointment of Senior Chancellor Kimberly Richey, who serves as the Florida Department of Education designee for Education Commissioner Manny Diaz.

Chair Smith shared a highlight of yesterday’s field experience at Valencia College where board members received a tour of the Healthcare and Advance Manufacturing training programs. She also recognized CareerSource Central Florida for helping to facilitate the event. Next, Chair Smith provided a summary of the June board meeting and gave an update on the activities that followed.

**III. Hurricane Idalia Response**

CareerSource Florida President and CEO Adrienne Johnston gave an update on the Hurricane Idalia response. CareerSource Florida, CareerSource Florida Crown,

CareerSource North Florida, and FloridaCommerce deployed to affected areas and stood up several centers across the Big Bend area to make sure residents had access to resources. CareerSource North Florida Executive Director Diane Head was scheduled to speak but had to return to her region to support staff during a mass layoff event. Johnston shared updates on Head's behalf.

CareerSource Florida Crown Executive Director Robert Jones shared an update on how Hurricane Idalia affected Columbia, Dixie, Gilchrist, and Union Counties. He received a request from the Florida Department of Children Families to open a Resource Support Center, where a Hope Florida navigator assisted him and his team with providing food, water, and diapers to residents. The center remained open for 11 days and averaged 120 families per day.

#### **IV. Consent Agenda**

Chair Smith presented the 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

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

**Motion:** Jennifer O'Flannery Anderson

**Second:** Robert Salonen

The Consent Agenda passed unanimously.

#### **V. President's Report**

CareerSource Florida President and CEO Adrienne Johnston shared an update on the priority initiatives from the June board meeting. In partnership with FloridaCommerce, funds have been distributed to support the Hope Florida initiative, led by First Lady Casey DeSantis. \$4.5 million has been allocated to assist customers in the Hope Florida program with job readiness skills development, career services, training, and supportive services.

The board approved \$2.75 million for the Florida Healthcare Training initiative. This initiative provides training for in-demand healthcare occupations to individuals who experience barriers to employment. The initiative is being piloted by CareerSource Northeast Florida and CareerSource Broward. Johnston said she looks forward to sharing the outcome at an upcoming meeting.

Johnston also highlighted The Hope Solution event, Florida Department of Children and Families Summit, and CareerSource Florida Summer Youth Employment Program. She

encouraged board members to attend the Florida Broadband Summit, hosted by CareerSource Florida in partnership with FloridaCommerce. She thanked CareerSource South Florida Executive Director for moderating a panel at the upcoming summit.

## **VI. Florida Workforce System Transformation Update**

Ernst & Young (EY) Managing Director Brian Woods and Senior Manager Janeth Merchan gave an update on the Florida Workforce System Transformation Plan. As part of Pillar I, CareerSource Florida and the EY team met with local workforce development board chief executives and Local Elected Officials (LEOs) who were impacted by realignment and consolidation efforts to discuss each board's current state operating model and progress to date.

EY provided an overview of the studies and workshops conducted in Phase One and Phase Two of the Workforce System Transformation Plan and mentioned plans to schedule biweekly meetings with impacted areas to measure change readiness and blockages. EY launched a Transition Governance Council of local workforce development board chief executives, which will meet monthly to review leading practices and encourage collaboration as everyone drives toward the same goal of having 21 local workforce development boards by the end of next fiscal year. EY provided a roadmap detailing their progress to date while implementing Pillar I, Pillar II, and Pillar III.

## **VII. Finance Council Report**

Finance Council Chair Bill Johnson shared an update on yesterday's Finance Council 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.

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

CareerSource Florida Business and Workforce Strategies Senior Vice President Dan McGrew provided an update on yesterday's Strategic Policy and Performance Council meeting on Chair Sophia Eccleston's behalf. The council heard CareerSource Florida Workforce Program Development team members on various initiatives, including quarter three Letter Grades, the Hope Florida partnership with the Florida Department of Children and Families, apprenticeship expansion efforts, and the Florida Healthcare Training initiative.

The council received an update on the state's plan to move from a unified Workforce Innovation and Opportunity (WIOA) Act four-year plan to a combined WIOA four-year plan, which includes more workforce partners than required by WIOA. Additionally, the council approved three action items that are integral to the Florida Workforce System Transformation Plan.

The council was presented with an analysis on the labor market for persons with disabilities in Florida from Able Trust and a statewide labor market and program performance update from FloridaCommerce.

## **IX. Action Items**

CareerSource Florida Workforce Program Development Policy Analyst Warren Davis presented Action Item 1.

**1. Regional Planning Area Strategic Policy**

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

**Motion:** Laurie Sallarulo

**Second:** Bayne Beecher

The action item passed unanimously.

CareerSource Florida Workforce Program Development Senior Director Dehryl McCall presented Action Item 3.

**2. Education Industry Consortium Strategic Policy**

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

**Motion:** Jennifer O’Flannery Anderson

**Second:** Laurie Sallarulo

The action item passed unanimously.

FloridaCommerce Bureau of One-Stop and Program Support Deputy Chief Keantha Moore presented Action Item 3.

**3. Eligible Training Provider List Administrative Policy**

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

**Motion:** John Adams

**Second:** Robert Salonen

The action item passed unanimously.

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

CareerSource Florida Business and Workforce Strategies Senior Vice President Dan McGrew shared the latest developments on Pillar II, System-wide Improvements in the Florida Workforce System Transformation Plan. His team is creating two policies that govern the CareerSource Florida network’s statewide procurement strategy. EY will provide an analysis to identify areas where the procurement will be most beneficial.

**XI. FloridaCommerce Report**

FloridaCommerce Division of Workforce Services Deputy Secretary Lindsay Volpe provided an economic update. She discussed the latest disaster relief efforts following Hurricane Idalia, as well as House Bill 5 which aims to streamline the state's economic development goals. Volpe also gave updates on awards, FL Wins, and the Reemployment Assistance Modernization.

**XII. Local Partners Report**

CareerSource Suncoast President and CEO Josh Matlock presented on behalf of Florida Workforce Development Association (FWDA) President and CareerSource Escarosa CEO Marcus McBride. Matlock said the local workforce delivery system continues to be recognized as a national leader. CareerSource Northeast Florida President and CEO Bruce Ferguson was invited to testify at a WIOA Reauthorization hearing at the House of Committee on higher education and workforce development. Matlock said he is looking forward to celebrating workforce leaders throughout the state at the annual awards luncheon.

**XIII. 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.

There were no comments.

**XIV. Chair's Closing Remarks**

Chair Smith reminded the board of the upcoming October Executive Committee meeting and December board and council meetings and adjourned the meeting at 10:20 a.m.



## Consent Item 2

### OCTOBER 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.

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#### FOR CONSIDERATION

- **Approval of October 12, 2023, Meeting Minutes, to include any modifications or changes noted by the board.**

**CareerSource Florida  
Executive Committee Meeting Minutes  
October 12, 2023**

**I. CALL TO ORDER**

Chair Stephanie Smith called the meeting to order at 4:00 p.m.

**II. ROLL CALL**

The following members were present:

Stephanie Smith  
Jennifer O’Flannery Anderson  
Sophia Eccleston  
Bill Johnson  
Meredith Stanfield  
Emmanuel Tormes  
Lindsay Volpe

**III. CONSENT ITEM**

**July 2023, Meeting Minutes**

Chair Smith called for a vote to approve the Consent Item.

**Motion:** Jennifer O’Flannery Anderson

**Second:** Bill Johnson

The consent item passed unanimously. There were no public comments.

**IV. Presentation of the 2022-2023 Local Workforce Development Board Letter Grades**

CareerSource Florida President and CEO Adrienne Johnston provided a high-level overview to refresh everyone on the letter grades process before introducing Senior Vice President of Workforce Program Development Dan McGrew to introduce the 2022-2023 letter grades.

McGrew discussed how letter grades are measured using criteria established by the Governor’s Reimagining Education and Career Help (REACH) Office, and data from the 2022-23 fiscal year, before announcing the 2022-2023 letter grades for local workforce development boards. Of the 24 local workforce development boards, 19 received As and five received Bs.

## V. Florida Workforce System Transformation Update

President Johnston shared the continued progress that has been made on the Florida Workforce System Transformation plan. She let the board know they would be considering a new policy shortly during today's meeting, focusing on the usage of state procedure tools and resources, and ensuring accountability and efficiency and effective use of federal funds.

She also highlighted that the CareerSource Florida team and consultants at Ernst & Young (EY) led a session at the Workforce Professional Development Summit to focus on a closer look at the implementation of the Florida Workforce System Transformation plan and how CareerSource Florida is working with the local areas to implement the standardization of contracts and the designation of regional planning areas.

President Johnston concluded, noting by June 30, 2024, a new governance will be determined and in place in all the newly aligned and consolidated areas, reducing the number of local workforce development boards from 24 to 21. Significant improvements in policies, processes, technology, and tools will also have been made, ensuring the entire state workforce system remains committed to continuous improvement.

## VI. Action Items

### 1. System-wide Improvements: Statewide Standardization of Tools and Services Strategic Policy

Chair Smith called for a vote to approve Action Item 1.

**Motion:** Bill Johnson

**Second:** Sophia Eccleston

There were no members of the public wishing to comment on Action Item 1.

The action item passed unanimously.

### 2. Determination on Appeal of Credentials Review Committee Actions

Chair Smith called for a vote to approve Action Item 2.

**Motion:** Sophia Eccleston

**Second:** Meredith Stanfield

There were no members of the public wishing to comment on Action Item 2.

The action item passed unanimously.

**VII. Open Discussion/Public Comment**

Sophia Eccleston thanked the CareerSource Florida team for their hard work in order to well-prepare the board for these meetings.

There were no public comments.

**VIII. Chair’s Closing Remarks**

Chair Smith closed by thanking everyone for their time and reminding them of upcoming CareerSource Florida meetings.

**IX. Board Secretary Certification**

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

\_\_\_\_\_  
Adrienne Johnston  
Board Secretary

\_\_\_\_\_  
Date

*Additional meeting dialogue is recorded and available online at this link:*  
[careersourceflorida.com/event/executive-committee-meeting-4/](https://careersourceflorida.com/event/executive-committee-meeting-4/).

CareerSource Florida  
Board of Directors Meeting  
December 12, 2023  
**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 Children and Families Secretary Shevaun Harris serves as a member of the CareerSource Florida Board of Directors.

Pursuant to the CareerSource Florida Bylaws, s. 4.17, Secretary Harris designates Florida Department of Children and Families Deputy Secretary Casey Penn to serve in her absence, subject to the board's approval.

### **FOR CONSIDERATION**

- **Approval of Florida Department of Children and Families Secretary Shevaun Harris' request to appoint Deputy Secretary Casey Penn as the Florida Department of Children and Families designee to serve in her absence on the CareerSource Florida Board of Directors, contingent upon any additional information or approval signatures required.**



**State of Florida**  
**Department of Children and Families**

**Ron DeSantis**  
Governor

**Shevaun L. Harris**  
Secretary

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November 30, 2023

MEMORANDUM

**TO:** Casey Penn, Deputy Secretary

**FROM:** Shevaun L. Harris, Secretary

**SUBJECT:** Delegation of Authority

Pursuant to the authority vested in me by section 20.05(1)(b), Florida Statutes, I hereby delegate to you, in your capacity as Deputy Secretary, the power to act on my behalf in all matters related to CareerSource Florida, except those explicitly required by the applicable law to be non-delegable and to be carried out by me in my capacity as Secretary of the Florida Department of Children and Families. This delegation supersedes any prior delegations of authority relating to these matters.

In exercising this authority, you shall comply with all applicable laws and rules. This delegation should remain in effect until superseded or rescinded.

Shevaun L. Harris  
Secretary

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2415 North Monroe Street, Suite 400, Tallahassee, Florida 32303-4190

Mission: Work in Partnership with Local Communities to Protect the Vulnerable, Promote Strong and Economically Self-Sufficient Families, and Advance Personal and Family Recovery and Resiliency

CareerSource Florida  
Board of Directors Meeting  
December 12, 2023  
**Consent Item 4**  
Approved \_\_\_\_\_  
Disapproved \_\_\_\_\_

## **Consent Item 4**

### **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 Juvenile Justice Secretary Eric Hall serves as a member of the CareerSource Florida Board of Directors.

Pursuant to the CareerSource Florida Bylaws, s. 4.17, Secretary Hall designates Florida Department of Juvenile Justice Deputy Secretary Adrienne Campbell to serve in his absence, subject to the board's approval.

### **FOR CONSIDERATION**

- **Approval of Florida Department of Juvenile Justice Secretary Eric Hall's request to appoint Deputy Secretary Adrienne Campbell as the Florida Department of Juvenile Justice designee to serve in his absence on the CareerSource Florida Board of Directors, contingent upon any additional information or approval signatures required.**



# FLORIDA DEPARTMENT OF JUVENILE JUSTICE

## INTEROFFICE MEMORANDUM

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**DATE:** December 7, 2023  
**TO:** Adrienne Campbell, Deputy Secretary  
**FROM:** Eric Hall, Secretary *E. Hall*  
**SUBJECT:** Delegation of Authority – CareerSource Florida

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Pursuant to the authority vested in me by Section 20.05(1)(b), Florida Statutes, I hereby delegate to you in your capacity as Deputy Secretary, the power to act on my behalf in all matters related to CareerSource Florida, except those explicitly required by the applicable law to be non-delegable and to be carried out by me in my capacity as Secretary of the Florida Department of Juvenile Justice. This delegation supersedes any prior delegations of authority relating to these matters.

In exercising this authority, you shall comply with all applicable laws and rules. This delegation should remain in effect until superseded or rescinded.

2737 Centerview Drive • Tallahassee, Florida 32399-3100 • (850) 488-1850

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Ron DeSantis, Governor

Eric S. Hall, Secretary

*The mission of the Florida Department of Juvenile Justice is to enhance public safety through high-quality effective services for youth and families delivered by world-class professionals dedicated to building a stronger, safer Florida.*



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

## Consent Item 5

### DELIVERY OF ADDITIONS 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. At the December 6 meeting of the Credentials Review Committee the committee approved the addition of 18 credentials of value to the 2023-2024 Master Credentials List with full approval and 14 additional credentials with provisional approval.

Evaluation of credentials was conducted by an interagency team of subject matter experts from FloridaCommerce, the Florida Department of Education, and CareerSource Florida. Each credential was evaluated against the Framework of Quality and, if applicable, the eligibility requirements for CAPE funding established by the Florida Department of Education.

### FOR CONSIDERATION

- **Approve delivery to the Florida State Board of Education of 18 credentials of value to the 2023-2024 Master Credentials List with full approval and 14 additional credentials with provisional approval to the 2023-2024 Master Credentials List as approved by the Florida Credentials Review Committee at the December 6, 2023, meeting.**

- **Authorize the CareerSource Florida team, in collaboration with the Florida Department of Education, 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**  
**Degree Programs of Study**

Educational Sector	6-digit CIP Code (NCES 2020)	10-digit CIP Code (NCES 2020)	Program/Profession Title	Program Type	Degree or Non Degree Designation	SOC Code Linkage(s)	Major SOC Code(s)	Major SOC Title(s)	Pass Demand Criteria	State Demand List(s)	RDOL Regional Demand List(s)	LMEC Regional Demand List(s)
FCS	10507	1101050701	Equine Studies	Associate in Science	Degree	39-2011	39-0000	Personal Care and Service Occupations	Yes	Not on Lists	Not on Lists	16

**2023-2024 Master Credentials List Recommended Additions**  
**Non-Degree Programs of Study**

Yellow Highlights = Credential provisionally approved. See Notes column for details.

Educational Sector	6-digit CIP Code (NCES 2020)	10-digit CIP Code (NCES 2020)	Program/Profession Title	Program Type	Degree or Non Degree Designation	SOC Code Linkage(s)	Major SOC Code(s)	Major SOC Title(s)	Pass Demand Criteria	State Demand List(s)	RDOL Regional Demand List(s)	LMEC Regional Demand List(s)	Pass Wage Criteria	Notes
FCS	10101	0101010166	Agribusiness Management	Advanced Technical Certificate	Non Degree	11-1021; 11-9013	11-0000	Management Occupations	Yes	RDOL	Not on Lists	18	Yes	
FCS	131003	0713100307	American Sign Language	College Credit Certificate	Non Degree	27-3091	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	Yes	RDOL	Not on Lists	10, 12, 17	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	100304	0610030466	Animation And Game Art	Advanced Technical Certificate	Non Degree	27-1014; 27-1024	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	Yes	Not on Lists	Not on Lists	17	Yes	
FCS/Districts	111003	0511100302	Applied Cybersecurity	Career Certificate	Non Degree	15-1231	15-0000	Computer and Mathematical Occupations	Yes	RDOL	1, 12, 13, 15, 22, 23	Not on Lists	Yes	
FCS	10303	0101030366	Aquaculture Management	Advanced Technical Certificate	Non Degree	11-9013	11-0000	Management Occupations	Yes	RDOL	Not on Lists	18	Yes	
FCS	131003	0713100366	ASL - English Interpreting	Advanced Technical Certificate	Non Degree	25-3011; 27-3091	25-0000; 27-0000	Educational Instruction and Library Occupations; Arts, Design, Entertainment, Sports, and Media Occupations	Yes	RDOL	Not on Lists	10, 12, 17	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	520703	0552070367	Business Entrepreneurship	Advanced Technical Certificate	Non Degree	11-1021; 11-2021	11-0000	Management Occupations	Yes	RDOL	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24	Not on Lists	Yes	
FCS	521301	0552130101	Business Intelligence Professional	College Credit Certificate	Non Degree	15-1253	15-0000	Computer and Mathematical Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	510719	0351071901	Clinical Research Coordinator	College Credit Certificate	Non Degree	11-9111	11-0000	Management Occupations	Yes	Not on Lists	1, 5, 8, 9, 10, 11, 12, 13, 14, 15, 16, 18, 20, 21, 22, 23, 24	Not on Lists	Yes	
FCS/Districts	110902	0511090200	Cloud Computing & Virtualization	Career Certificate	Non Degree	15-1231	15-0000	Computer and Mathematical Occupations	Yes	RDOL	1, 12, 13, 15, 22, 23	Not on Lists	Yes	
FCS	90902	0609090200	Communication Leadership	College Credit Certificate	Non Degree	27-3099	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	Yes	Not on Lists	Not on Lists	24	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	111003	0511100314	Cybersecurity Analyst	College Credit Certificate	Non Degree	15-1231	15-0000	Computer and Mathematical Occupations	Yes	RDOL	1, 12, 13, 15, 22, 23	Not on Lists	Yes	
FCS	111003	0511100313	Cybersecurity Operations Analyst	College Credit Certificate	Non Degree	15-1231	15-0000	Computer and Mathematical Occupations	Yes	RDOL	1, 12, 13, 15, 22, 23	Not on Lists	Yes	
FCS	307001	0530700100	Data Science Technician	College Credit Certificate	Non Degree	15-1252	15-0000	Computer and Mathematical Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	111003	0511100311	Database & E-Commerce Security	College Credit Certificate	Non Degree	15-1231	15-0000	Computer and Mathematical Occupations	Yes	RDOL	1, 12, 13, 15, 22, 23	Not on Lists	Yes	
FCS	110802	0511080266	Database Technology	Advanced Technical Certificate	Non Degree	15-1245	15-0000	Computer and Mathematical Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	521404	0252140400	Digital Marketing Strategy	College Credit Certificate	Non Degree	15-1255	15-0000	Computer and Mathematical Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	521201	0552120102	E-Business Security Technical Certificate	College Credit Certificate	Non Degree	11-3021	11-0000	Management Occupations	Yes	RDOL	2, 5	Not on Lists	Yes	
FCS	521201	0552120166	E-Business Technology	Advanced Technical Certificate	Non Degree	11-1021; 13-1198	11-0000; 13-0000	Management Occupations; Business and Financial Operations Occupations	Yes	RDOL	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24	Not on Lists	Yes	
FCS	430302	0743030267	Emergency Administration And Management	Advanced Technical Certificate	Non Degree	11-9111; 11-9161	11-0000	Management Occupations	Yes	Not on Lists	Not on Lists	8, 15, 17	Yes	

**2023-2024 Master Credentials List Recommended Additions**  
**Non-Degree Programs of Study**

Yellow Highlights = Credential provisionally approved. See Notes column for details.

Educational Sector	6-digit CIP Code (NCES 2020)	10-digit CIP Code (NCES 2020)	Program/Profession Title	Program Type	Degree or Non Degree Designation	SOC Code Linkage(s)	Major SOC Code(s)	Major SOC Title(s)	Pass Demand Criteria	State Demand List(s)	RDOL Regional Demand List(s)	LMEC Regional Demand List(s)	Pass Wage Criteria	Notes
FCS	10507	0101050766	Equine Studies	Advanced Technical Certificate	Non Degree	39-2011	39-0000	Personal Care and Service Occupations	Yes	Not on Lists	Not on Lists	16	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	450702	0545070213	Geographic Information System	College Credit Certificate	Non Degree	17-3031	17-0000	Architecture and Engineering Occupations	Yes	RDOL	12, 17, 18	Not on Lists	Yes	
FCS	500408	0450040866	Interior Design Technology	Advanced Technical Certificate	Non Degree	27-1025; 41-3091	27-0000; 41-0000	Arts, Design, Entertainment, Sports, and Media Occupations; Sales and Related Occupations	No	Not on Lists	Not on Lists	Not on Lists	No	Must show local demand and sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	90902	0609090266	New Media Communications	Advanced Technical Certificate	Non Degree	27-2012; 27-3023	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	Yes	RDOL	Not on Lists	Not on Lists	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	111005	0511100501	Project Management Associate	College Credit Certificate	Non Degree	13-1082	13-0000	Business and Financial Operations Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	520215	0552021501	Risk Management And Insurance Management	College Credit Certificate	Non Degree	13-2054	13-0000	Business and Financial Operations Occupations	Yes	Not on Lists	Not on Lists	16	Yes	
FCS	520201	0552020117	Sports Management Operations	College Credit Certificate	Non Degree	11-9072	11-0000	Management Occupations	Yes	Not on Lists	Not on Lists	16	Yes	
FCS	111005	0511100568	Technology Project Management	Advanced Technical Certificate	Non Degree	13-1198; 15-1299	13-0000; 15-0000	Business and Financial Operations Occupations; Computer and Mathematical Occupations	Yes	Not on Lists	2	Not on Lists	Yes	
FCS	111005	0511100502	Technology Project Manager	College Credit Certificate	Non Degree	13-1082	13-0000	Business and Financial Operations Occupations	No	Not on Lists	Not on Lists	Not on Lists	Yes	Must show local demand.
FCS	131003	0713100367	Translation-Interpretation Studies: English-Spanish Track	Advanced Technical Certificate	Non Degree	25-3011; 27-3091	25-0000; 27-0000	Educational Instruction and Library Occupations; Arts, Design, Entertainment, Sports, and Media Occupations	Yes	RDOL	Not on Lists	10, 12, 17	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.
FCS	10999	0101099966	Zoo Animal Technology	Advanced Technical Certificate	Non Degree	19-1023	19-0000	Life, Physical, and Social Science Occupations	Yes	LMEC	Not on Lists	2, 4, 8, 9, 10, 12, 13, 15, 17, 18, 20, 21, 22, 24	No	Must show sequencing to higher-level credential that leads to occupation that does meet wage criteria.

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

## Consent Item 6

### REQUEST TO SERVE AS ONE-STOP OPERATOR

The Workforce Innovation and Opportunity Act (WIOA) requires local workforce development boards (LWDBs) 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. LWDBs 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 LWDB may need to temporarily assume the role of one-stop operator. When this happens, LWDBs 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 LWDB 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 LWDB 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 one (1) request from a LWDB to temporarily assume the role of one-stop operator.

1. CareerSource South Florida submitted a request to FloridaCommerce on November 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 December 31, 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 of which, CareerSource South Florida re-released a second Request for Proposal on July 27, 2023. CareerSource South Florida received one complete submission, but the respondent failed to meet the minimum criteria required to be selected as a One-Stop Operator. Because of these factors, CareerSource South Florida is requesting an extension to allow sufficient time for them to have a third-party conduct a procurement to allow CareerSource South Florida to compete.

FloridaCommerce recommends that 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 January 1, 2024, through March 31, 2024, 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 South Florida to serve as a One-Stop Operator beginning January 1, 2024, through March 31, 2024.**

### **Supporting Documents**

- CareerSource South Florida's request for authorization to serve temporarily as the one-stop operator for LWDB 23.



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

From: Rick Beasley, Executive Director, CareerSource South Florida

Date: November 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 March 30, 2023. This waiver extension is required to allow our organization to complete a 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 second release on August 15, 2023 and received one complete submission. Unfortunately, the respondent failed to meet the minimum criteria required to be selected as a One-Stop Operator.

As a result of which, CSSF has made a formal request to CareerSource Research Cost to conduct a competitive procurement process on our behalf as outline in Administrative Policy 097. CareerSource Research Coast has accepted the request and will release a Request for Proposal as tentatively outline below.

#### TIME TABLE/SCHEDULE OF EVENTS

Competitive Process by CareerSource Research Coast

RFP Coordination	November 1 – 30, 2023
RFP Release	December 4, 2023 (Tentative)
Offeror's Conference/Questions	December 18, 2023
Deadline for Receipt of Proposals	January 16, 2024
Notification of selected provider	February 1, 2024
Board Approval	February 15, 2024
Execution of Contract	March 1, 2024

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

A handwritten signature in black ink, appearing to be "R. Smith", is written over the typed name of Robert Smith.



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

## Consent Item 7

### REQUEST TO SERVE AS ONE-STOP OPERATOR

The Workforce Innovation and Opportunity Act (WIOA) requires local workforce development boards (LWDBs) 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. LWDBs 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). In instances where the LWDB 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 LWDB successfully competes to serve as the One-Stop Operator, the LWDB must obtain approval from the Governor and the Chief Local Elected Official.

FloridaCommerce received two (2) requests from LWDBs to serve as a One-Stop Operator.

1. The Florida Workforce Development Association (FWDA) published a Request for Proposal (RFP) on June 27, 2023, for One-Stop Operator services for LWDB 1. The deadline for proposals was July 27, 2023. CareerSource Escarosa was the only respondent to the RFP. FWDA submitted a letter to CareerSource Escarosa's Board of Directors on August 1, 2023, recommending CareerSource Escarosa as the One-Stop Operator. The recommendation was approved by the CareerSource Escarosa's Board of Directors on November 3, 2023. The Chief Local Elected Officials approved the recommendation by way of executing an agreement with CareerSource Escarosa on September 7, 2023, to serve as the one-stop operator. Pursuant to CareerSource Florida Administrative Policy 97 – One-Stop Operator Procurement, CareerSource Escarosa has met the requirements to serve as the one-stop operator for CareerSource Escarosa.

FloridaCommerce recommends that the CareerSource Florida Board of Directors authorize CareerSource Escarosa to serve as the One-Stop Operator effective September 1, 2023, through August 31, 2026.

2. The FWDA published an RFP on July 28, 2023, for One-Stop Operator services for LWDB 21. The deadline for proposals was August 28, 2023. CareerSource Palm Beach County was the only respondent to the RFP. FWDA submitted a letter to CareerSource Palm Beach County's Board of Directors on September 17, 2023, recommending CareerSource Palm Beach County as the One-Stop Operator. The recommendation was approved by the CareerSource Palm Beach County's Board of Directors on October 19, 2023. The Chief Local Elected Officials agreed to the recommendation by way of an executed agreement with CareerSource Palm Beach County to serve as the one-stop operator. Pursuant to CareerSource Florida Administrative Policy 97 – One-Stop Operator Procurement, CareerSource Palm Beach County has met the requirements to serve as the one-stop operator for CareerSource Palm Beach County.

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

## **FOR CONSIDERATION**

- **Authorize CareerSource Escarosa to serve as one-stop operator effective September 1, 2023, through August 31, 2026.**
- **Authorize CareerSource Palm Beach County to serve as a one-stop operator effective July 1, 2023, through June 30, 2026.**

### **Supporting Documents**

- CareerSource Escarosa's request for authorization to serve as the One-Stop Operator for LWDB 21.
- CareerSource Palm Beach County's request for authorization to serve as the one-stop operator for LWDB 21.

**REQUEST FOR PROPOSAL  
FOR  
ONE-STOP OPERATOR  
SERVING  
CAREERSOURCE ESCAROSA**

**RFP-CSE-23-OSO-01  
Date Issued: June 27, 2023  
DEADLINE FOR SUBMISSION: July 27, 2023**

**Submit Responses Electronically Only to:**

Stacy Campbell-Domineck, President/CEO

CareerSource Polk

[stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@careersourcepolk.com)



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As an equal opportunity employer and program, CareerSource Escarosa is supported by the U.S. Departments of Labor, Health and Human Services, Agriculture as part of awards totaling \$7.5 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.

## I. BACKGROUND

CareerSource Escarosa (CSE) a not-for-profit 501(c) (3) corporation serves as fiscal agent and provider of WIOA Title I services. CareerSource Escarosa is governed by an independent volunteer board of directors, whose members are appointed by the Escambia and Santa Rosa counties' Boards of County Commissioners. To service Escambia and Santa Rosa Counties, thousands of jobseekers and businesses receive employment and training services through our 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.careersourcescarosa.com](http://www.careersourcescarosa.com)

The subrecipient shall deliver the services described in this RFP at the following locations as determined by CSE.

### **CareerSource Career Center**

6913 N. 9th Avenue Ste. 12  
Pensacola, FL 32504  
Hours: Monday – Friday 7:30AM – 4:30PM

### **CareerSource Career Center**

5723 Highway 90  
Milton, FL 32583  
Hours: Monday – Friday 7:30AM – 4:30PM

## 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 coordinators 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.

CareerSource Polk 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 Escarosa for the CSE comprehensive centers in Escambia and Santa Rosa Counties, as described in the Workforce Innovation and Opportunity Act (WIOA).

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Public notice of this RFP has been published in various avenues in the CSE operating area and will also be distributed via email to organizations on the CSE Bidder's List. Upon its release, the RFP, and all accompanying attachments, will be posted on CSE's website at [www.careersourceescarosa.com](http://www.careersourceescarosa.com).

### **Funding Period**

It is the intent to obligate no more than \$40,000 annually for this reimbursement-based contract. At its discretion, CareerSource Escarosa 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 Escarosa Board of Directors reserves the right to negotiate amounts based on proposals received.

CareerSource Escarosa 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.

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- 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.

CareerSource Escarosa 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 Escarosa 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

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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 Escambia and Santa Rosa Counties Board of County Commissioners, the CareerSource Escarosa 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 Escarosa 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 Escarosa.

### B. Questions

Questions concerning this Request for Proposals must be submitted in writing via email (with Subject: RFP Questions) to the following email address: [stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@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 CareerSource Escarosa website at <https://careersourceescarosa.com/procurement>

Respondents shall not contact any CareerSource Escarosa or CareerSource Polk employee for information with respect to this solicitation. CareerSource Polk 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 Polk.

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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	June 27, 2023
Deadline for Submitting Questions	11:00 AM (CST) July 15, 2023
Questions and Answers Posted	3:00 PM (CST) July 17, 2023
<b>Proposal Submission Deadline</b>	July 27, 2023, by 11:00 AM, CST
Board of Directors' Meeting	July 2023 (see CSE website for details)
Provision of Services Begins	September 1, 2023

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

Stacy Campbell-Domineck, President/CEO

at

[stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@careersourcepolk.com)

*\*The Board Meetings are Public Notice open meetings (open to the public) and dates are posted on the CareerSource Escarosa website at <https://careersourceescarosa.com/leadership/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 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 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

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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 CareerSource Escarosa 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, Specific meeting information is posted on the CSE website, <https://careersourceescarosa.com/leadership/meetings>.

CareerSource Escarosa 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.

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4. **References:** CareerSource Polk 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 September 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: Points Available	Selection Criteria
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 CareerSource Escarosa 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 Escarosa Board of Directors.
- Non-conforming proposals may be considered non-responsive and subject to no further review.
- CareerSource Escarosa Board of Directors reserves the right to request additional information for clarification from proposers, or to allow correction of errors or omissions.
- CareerSource Escarosa 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 CareerSource Escarosa at the time and under the conditions stipulated in the specifications of this request.
- CareerSource Escarosa Board of Directors reserves the right to retain all proposals submitted; CareerSource Escarosa Board of Directors will not return proposals. All proposals become the property of CareerSource Escarosa and a matter public record available for inspection to any interested parties.

### A. Review and Award

1. CareerSource Escarosa 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 Escarosa 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 Escarosa 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 Escarosa 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 Polk will assign a member of his/her team, following the format outlined within this RFP, to complete the initial review for responsiveness. Responsive proposals will be forwarded to the CareerSource Polk 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 Escarosa Board of Directors on the date/time as indicated on the Timetable of Events.
3. The CareerSource Escarosa 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.

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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 CSE 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 September 1, 2023, through June 30, 2024.
2. CareerSource Escarosa 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 Escarosa 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 Polk that clearly states the reason for the appeal.
3. The President/CEO of CareerSource Polk will review the protest and compare it to the CareerSource Escarosa 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 Polk 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 Polk

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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 CareerSource Polk President/CEO's determination, the protester must notify the President/CEO of CareerSource Polk in writing within a 10-day period of the determination. The CareerSource Escarosa 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 Polk or CareerSource Escarosa Executive Committee will hear no further appeals.

## **VIII. ATTACHMENTS**

Required Attachments - provided by CareerSource Escarosa 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

<b>PROPOSAL COVER SHEET</b>
-----------------------------

Entity Name:	<u>Click or tap here to enter text.</u>
Entity Physical Address:	<u>Click or tap here to enter text.</u>
Entity Mailing Address:	<u>Click or tap here to enter text.</u>
Phone Number:	<u>Click or tap here to enter text.</u>
Email Address:	<u>Click or tap here to enter text.</u>
FEID#:	<u>Click or tap here to enter text.</u>
Type Of Entity:	<u>Click or tap here to enter text.</u>

**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.

<b>Primary Contact:</b>	<u>Click or tap here to enter text.</u>
Name:	<u>Click or tap here to enter text.</u>
Title:	<u>Click or tap here to enter text.</u>
Phone Number:	<u>Click or tap here to enter text.</u>
Email Address:	<u>Click or tap here to enter text.</u>

<b>Secondary Contact:</b>	<u>Click or tap here to enter text.</u>
Name:	<u>Click or tap here to enter text.</u>
Title:	<u>Click or tap here to enter text.</u>
Phone Number:	<u>Click or tap here to enter text.</u>
Email Address:	<u>Click or tap here to enter text.</u>

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**

CareerSource Escarosa (CSE) 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 Escarosa 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 Escarosa 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

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permission of the customer, except that such information which is necessary as determined by CareerSource Escarosa for purposes related to the performance or evaluation of the Agreement may be divulged to CareerSource Escarosa 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 Escarosa. 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 Escarosa, 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 Escarosa, 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 Escarosa. 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 Escarosa.

## **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 sub-contracts. In compliance with Public Law (Pub. L.) LO3-277, the Contract shall not permit smoking

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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 Escarosa 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 Escarosa 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 Escarosa.
- 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 CareerSource Escarosa, 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 Escarosa 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 Escarosa 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.

---

Proposer

---

Name and Title of Authorized Representative

---

Signature

---

Date

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**Kathaleen Cole**  
Board Chair

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

**Workforce Innovation and Opportunity Act (WIOA)  
One-Stop Operator Services  
Request for CareerSource Escarosa to be named as One-Stop Operator**

Attachment "A" describes CareerSource Escarosa's Internal controls for eliminating conflicts of interest and the establishment of appropriate firewalls. We are confident that our firewall and conflict of interest policies are current, and meeting WIOA requirements.

Regarding monitoring, an independent entity will be identified to monitor CareerSource Escarosa's performance as One-Stop Operator. The results of monitoring will be reported to this region's Chief Local Elected Officials.

Attachment "B" describes CareerSource Escarosa's efforts to complete a competitive procurement process through a "third party" from which one response was received from CareerSource Escarosa.

Attachment "C" is the recommendation from the Florida Workforce Development Association to CareerSource Escarosa's Board of Directors that CareerSource Escarosa be selected to serve as One-Stop Operator for PY2023-2026 base on the proposal submitted.

CareerSource Escarosa requests approval to be name as the One-Stop Operator for LWDA 1.

A handwritten signature in black ink that reads "Mr. McBride".

Marcus L. McBride, PhD  
Chief Executive Officer



**Workforce Innovation and Opportunity Act One-Stop Operator Services  
Request for CareerSource Escarosa to be named as a One-Stop Operator**

**Background:**

WIOA (Workforce Innovation Opportunity Act - Pub. L. 113-128), establishes the requirement for the procurement of One Stop Operators in the workforce system. All Florida CareerSource Boards are required to solicit proposals for One-Stop Operator Services. CareerSource Escarosa has complied with this requirement for the four-year period ending FY 2023-2026, with recommendation from Florida Workforce Development Association to serve as One-Stop Operator based on suitable response to the solicitation. Therefore, we respectfully request permission to fill the role of One-Stop Operator in our local area.

This role would not impact or change the already established CareerSource Escarosa day-to-day operations but serve as non-staff extension providing input for our services and community partnerships.

The primary requested responsibility roles for the named One-Stop Operator include:

- *Conduct quarterly reviews of each One Stop career center in our two-county area to ensure effective delivery of all partner programs.*
- *Coordinate with senior management, key partners, and officials to review program delivery efficiencies and make recommendations of best practices and training options for continuous improvement via quarterly strategy meetings.*
- *Review, develop, and enhance Memorandum of Understanding (MOU) with partnering programs, agencies and services to establish an integrated workforce 'system' that extends beyond basic workforce services*

As required to ensure compliance with the WIOA legislation, Florida Workforce Development Association released the Request for Proposals for One-Stop Operator as outlined in the following timeline:

- Advertising & Publishing RFP.....June 27, 2023
  - *Posted on CSE Website*
  - *Email notice forwarded to entities on Vendor List and local education agencies*
- Proposal Submittal Due Date.....July 27, 2023, by 11:00 a.m., CST
- Provision of Services.....September 1, 2023

Florida Workforce Development Association issued a RFP as required by WIOA, for proposals for a four-year period, ending with FY 2023-26.

Following approved Florida Workforce Development Association local and Florida State procurement policies to ensure a comprehensive outreach to secure RFP's for local One-Stop Operator services, one response was received for the local One-Stop Operator services.

**Action Requested:**

Following documented solicitation, federal and state (2 CFR 220.320(f)) delineates that local CareerSource Boards may be named as the One-Stop Operator ensuring the following parameters are in place:

- Eliminate Conflicts of Interest;
- Establishing appropriate firewalls; and,
- Establish oversight, monitoring, and evaluation of performance

Attachment (A) outlines the CSE required policies outlined to ensure compliance as outlined in the WIOA legislation.

**The CSE Board of Directors is hereby requesting consideration for approval from the Escambia and Santa Rosa Boards of County Commissioners to be named the local One-Stop Operator in compliance with the WIOA legislation.**

**CareerSource Escarosa**

*Kathaleen L Cole*

08/08/2023

Signature  
Kathaleen Cole, Chair

Date

**Designated Chief Local Elected Official  
Region I  
Escambia County**

*Lumon J. May*  
Signature

Lumon J. May, Chairman  
Printed Name

9/17/2023  
Date

Attest: Pam Childers  
Clerk of the Circuit Court  
*SEAL: Pam Childers*  
Deputy Clerk  
THE BOARD OF COUNTY COMMISSIONERS  
ESCAMBIA CO. FLORIDA  
SEAL: SEAEY

Date Executed: 9/17/2023

BCC Approved: 9/17/2023

Approved as to form and legal sufficiency.

By/Title: *Chris Galbraith ACLA*  
Date: 8/11/23



## **CareerSource Escarosa (LWDA 1)**

### **Attachment A**

One-Stop Operator following the required policies outlined in WIOA legislation:

- Eliminate Conflicts of Interest;
- Establishing appropriate firewalls; and,
- Establish oversight, monitoring, and evaluation of performance

### **Conflict of Interest (CSE Board Member)**

- CareerSource Escarosa Policy prohibits any Board Member from participating in the selection, award, or administration of a contract involving the Board if a real or apparent conflict of interest would be involved. Such a conflict would arise when the Board member or any member of his or her immediate family, his or her partner, or an organization that employs or is about to employ any of the parties indicated, has a financial or other interest in the firm, vendor, or service provider selected.
- If a Board member is aware (from the published agenda) of a conflict of interest prior to the Board meeting, the Board member must file a disclosure, indicating the nature of the conflict in a written memorandum to be filed with the person responsible for recording the Board minutes of the meeting, prior to the meeting in which consideration of the matter will take place. The memorandum becomes a public record upon filing, and will immediately be provided to the other members of the Board, and will be read publicly at the next meeting held subsequent to the filing of this written memorandum.

In the event that disclosure has not been made prior to the meeting or that any conflict is unknown prior to the meeting, the disclosure must be made orally at the meeting when it becomes known that a conflict exists. A written memorandum disclosing the nature of the conflict must be filed within 15 days after the oral disclosure with the person responsible for recording the minutes of the meeting and will be incorporated into the minutes of the meeting at which the oral disclosure was made. The memorandum becomes a public record upon filing, and will immediately be provided to the other members of the Board. The memorandum will be read publicly at the next meeting held subsequent to the filing of the memorandum.

### **Conflict of Interest (CSE Employee)**

- CareerSource Escarosa Policy prohibits any employee from participating in the selection, award, or administration of a contract involving CareerSource Escarosa if a real or apparent conflict of interest would be involved. Employees who are directly involved in providing services to clients shall not participate in a transaction if a real or apparent conflict of interest would be involved. Such a conflict would arise when the employee or any member of his or her immediate family, his or her partner, or an organization that employs or is about to employ any of the parties indicated herein, has a financial or other interest that is the result of the transaction. Any employee who may be engaged in the procurement of goods and services for CareerSource Escarosa has an obligation to disclose any real or apparent conflict of interest with any vendor or contractor. Any employee who may be engaged in providing program services to clients has

an obligation to disclose any real or apparent conflict of interest and to relinquish case management to an appropriate member of the Management Team.

Staff members who have a conflict of interest with any applicant for services may not participate in any eligibility determination, approval for enrollment, or approval for the provision of funded services. The conflict must be made known in writing and submitted to the Chief Executive Officer. The Chief Executive Officer will assign other staff members to determine eligibility and to provide any additional services. Reports of improper practice should be submitted directly to the Chief Executive Officer, except when the alleged impropriety appears to involve the Chief Executive Officer. Then, in such cases, reports should be referred to the Chair of the Executive Committee.

### **Conflict of Interest Statements**

- Board Members are asked to sign an overall Conflict of Interest Statement acknowledging CareerSource Policy when they are elected to the Board. Staff members are required to sign a like Conflict of Interest Statement as part of their New Hire packet acknowledging CareerSource Conflict of Interest Policy as it pertains to staff members.

### **Firewall**

- CareerSource Escarosa Policies define the Role of the Board, Chief Executive Officer, and staff. The Board of Directors is responsible for oversight of the organization by establishing board policies; identifying and proactively dealing with emerging issues; interpreting the organization's mission to the public; selecting and evaluating the performance of the Chief Executive Officer; establishing and maintaining programs and systems designed to assure compliance with terms of charter, contracts, and grants; selecting any Service Providers if direct services are not provided; and selecting the One Stop Operator as set forth in sec 121 (d) (2) (A) of the WIOA Innovation and Opportunity Act.

The Chief Executive Officer is responsible for hiring and evaluating staff for each of the organization's departments. The Chief Executive Officer is responsible for CareerSource Escarosa staff that provides direct services at the One Stop Center and Satellite Offices. In addition, the Chief Executive Officer is responsible for the coordination of services delivered by staff of any selected Service Provider and all Partner organizations including staff of the Department of Economic Opportunity. The Chief Executive Officer acts as head of the Management Team of CareerSource Escarosa which includes the Chief Operations Officer, the Finance Director, Assigned Program Managers, Quality Assurance, and Site Coordinators for each of the locations providing services. The Chief Executive Officer has been clearly designated as the sole person accountable to the Workforce Board. All other Board staff report to and take direction from the Chief Executive Officer.

- The Operations Organizational Structure shows the Chief Executive Officer has delegated authority for day-to-day operations management to the Chief Operating Officer (COO). The Chief Operating Officer has authority and responsibility for all programs and services provided through the CareerSource Escarosa system. The Chief Operating Officer provides direct supervision to the CareerSource Escarosa Center Managers. All staff located within a CareerSource Escarosa One Stop Center, including Department of Economic Opportunity staff, report to the Center Manager for day to day operations.

- Through continued communication from the CSE Chief Executive Officer to CSE Board of Directors the message is clearly delivered that the Board's primary mission is one of design, oversight, and policy making and not management of day to day operations. Board members and Councils are keenly aware of the distinction in the roles of Board oversight and role of staff to manage the operations. The Chief Executive Officer has been clearly designated as the sole person accountable to the Workforce Board. All other Board staff report to and take direction from the Chief Executive Officer.

### **Oversight, monitoring, and evaluation of performance (Fiscal and Program)**

- CareerSource Escarosa measures fiscal performance based upon several requirements. These include an annual independent audit conducted by an outside accounting firm; ongoing fiscal monitoring conducted by DEO; internal monitoring for compliance with requirements outlined by the State and as reported in the State One Stop Management Information System (OSMIS). The Treasurer is responsible for reporting to the full Board at regularly scheduled meetings. The independent audit is presented annually to the full Board of Directors when completed.
- CareerSource Escarosa staffing structure allows for two full time Monitoring positions in addition to the COO and Program Specific Managers. Quality Assurance is a very high priority with monitoring of all programs and processes conducted on a minimum bi-annually. Historically, CSE has been a high-performing board and expects to continue this high level of performance under WIOA. CareerSource Escarosa management also conducts frequent monitoring and review of local operating procedures, services, and performance for continuous improvement purposes. All CSE monitoring related activities are reviewed by the Chief Executive Officer and if warranted, immediate corrective action plans are implemented for any concerns identified.

Attachment B

**Sims, Janay**

---

**From:** Stacy Campbell-Domineck <Stacy.Campbell-Domineck@careersourcepolk.com>  
**Sent:** Tuesday, June 27, 2023 5:12 PM  
**To:** Stacy Campbell-Domineck  
**Subject:** Request for Proposals for One-Stop Operator - CareerSource Escarosa  
  
**Importance:** High

CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially from unknown senders.

Good afternoon!

You are receiving this message because you are subscribed to CareerSource Escarosa Bidder's List for Workforce Services. This is to notify you that a **NEW** Request for Proposals has been released for One-Stop Operator. Please find the RFP in its entirety on the CareerSource Escarosa website here: <https://careersourceescarosa.com/procurement>

Please make special note: If you/your firm decide to submit a proposal for this project, please be reminded that all proposals should be submitted to the following email address: Stacy Campbell-Domineck at [stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@careersourcepolk.com) by the deadline of July 27, 2023 at 11am CT.

*"The faintest ink is more powerful than the strongest memory"*

Stacy Campbell-Domineck

President & CEO

**CareerSource Polk**

600 N. Broadway Ave., Suite B | Bartow, FL 33830

P: 863-508-1600 x 1110 | [careersourcepolk.com](http://careersourcepolk.com)



Follow Us On Social Media!



# One Stop Operator

## RFP

### Mailing List

Organization/Company	Street Address	City	State	Zip Code
Calvary Christian Center	939 Massachusetts	Pensacola	FL	32505
Camp Fire Boys & Girls	1814 Creighton Road	Pensacola	FL	32504
Children's Home Society	1300 N. Palafox Street, #103	Pensacola	FL	32501
Communities in Schools of NWFL	P.O. Box 71	Pensacola	FL	32591-0071
Customized Business Improvements	3309 Lakeside Circle	Parrish	FL	34219
Department of Community Affairs Community Service Division	221 Palafox Street	Pensacola	FL	32502
Escambia County School District	30 East Texar Drive	Pensacola	FL	32503
Families Count	4400 Bayou Boulevard, #46	Pensacola	FL	32503
Florida Department of Health	1295 W. Fairfield Drive	Pensacola	FL	32501
Franklin/Duncan, Inc.	P.O. Box 21545	Ft. Lauderdale	FL	33335-1545
Geographic Solutions, Inc.	1001 Omaha Circle	Palm Harbor	FL	34683-4036
Goodwill Industries	2448 Gordon Smith Drive	Mobile	AL	36617
Gulf Coast Institute of Career Development	4630 N. "W" Street	Pensacola	FL	32501
Gulf Coast Internet	41 N. Jefferson Street, #401	Pensacola	FL	32521
Henkels & McCoy, Inc/Network	2637 Stanton Hall Court	Windermere	FL	34786
IQM and The Institute	1205 Gardenia Drive, #100-A	Tallahassee	FL	32312
LOL Enterprises, Inc.	105 Tarragona Way	Dayona Beach	FL	32114
Millennium Education Technologies, Inc.	1246 Hilltop Drive	Naples	FL	34013
Pensacola State College	1000 College Boulevard	Pensacola	FL	32504
Santa Rosa County School District	5086 Canal Street	Milton	FL	32570
Southeastern Vocational Services	2001 N. "E" Street	Pensacola	FL	32501
Summit Enterprises	1878 E. Nine Mile Road, #1008	Pensacola	FL	32514
The Paxen Group, Inc.	710 Atlantis Road	Melbourne	FL	32904
The Salvation Army	1501 N. "Q" Street Box 18569	P.O. Pensacola	FL	32523
Tuzzeo Consulting	4203 Spanish Trail Place	Pensacola	FL	32504
United Way of Escambia County	1301 W. Government Street	Pensacola	FL	32502
United Way of Santa Rosa County	6479 Caroline Street	Milton	FL	32570
University of West Florida	11000 University Parkway	Pensacola	FL	32514

**One Stop Operator  
RFP  
Mailing List**

West Florida Chamber of Commerce	1822 Saint Catherine Avenue	Pensacola	FL	32501-1046
Workforce Development Solutions, Inc.	3240 Capital Circle S.W.	Tallahassee	FL	32310
Workforce Response, Inc.	3495 Old Federal Road	Quincy	FL	32351
FloridaWest Economic Development Alliance	117 West Garden Street	Pensacola	FL	32502

**Notice Through Email**

<b>Email Address</b>	<b>Organization/Company</b>
<u><a href="mailto:Hunnicut.Pamela@odle.com">Hunnicut.Pamela@odle.com</a></u>	Olde Management Group, LLC
<u><a href="mailto:Susanbowden@tds.net">Susanbowden@tds.net</a></u>	Workforce Response, Inc.
<u><a href="mailto:rgoss@henkels.com">rgoss@henkels.com</a></u>	Henkels & McCoy, Inc.
<u><a href="mailto:C_jordan@familiescount.net">C_jordan@familiescount.net</a></u>	Families Count
<u><a href="mailto:mmaurer@rescare.com">mmaurer@rescare.com</a></u>	Arbor Education & Training
<u><a href="mailto:Keith.dixon@jobtrainingunlimited.com">Keith.dixon@jobtrainingunlimited.com</a></u>	Job Training Unlimited, Inc.
<u><a href="mailto:cleach@rescare.com">cleach@rescare.com</a></u>	Arbor Education & Training



# PROCUREMENT

## PROCUREMENT

**One Stop Operator Request for Proposals (RFP)**

**Information Technology Request For Proposals 22-23**

**IT RFP ATTACHMENTS**



CareerSource Escarosa  
Affiliates & Partners:



CareerSource Escarosa is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. If you are a print-disabled user, the document may be accessed by persons using TTY/TELE equipment via TTY 1-800-955-8771 or TDD/Voice 1-800-955-8770.



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 cursive script that reads "Stacy Campbell-Domineck".

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



**CAREERSOURCE ESCAROSA  
INFORMATION/ACTION ITEM  
ONE STOP OPERATOR PROCUREMENT AND SELECTION**

**Date:** November 3, 2023

**ITEM FOR DISCUSSION**

WIOA (Workforce Innovation Opportunity Act – Pub. L. 113-128), establishes requirement for procurement of One-Stop Operators to coordinate service delivery of One-Stop career center partners and providers at a career center.

As required to ensure compliance with the WIOA legislation, a Request for Proposals (RFP) for One-Stop Operator was released by a third party, Florida Workforce Development Association. The timeline is outlined below.

Advertising & Publishing RFP – June 27, 2023

- Posted on CSE Website
- Email notice forwarded to entities on Vendor List and local education agencies

Proposal Submittal Due Date – July 27, 2023, by 11:00 a.m., CST  
Provision of Services – September 1, 2023

Following approved Florida Workforce Development Association local and Florida State procurement policies to ensure a comprehensive outreach to secure RFPs for local One-Stop Operator services, one response was received for the local One-Stop Operator services, CareerSource Escarosa.

It is the recommendation of the Florida Workforce Development Association 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.

Following documented solicitation, federal and state (2CFR 220.320(f) delineates that local CareerSource Boards may be named as the One-Stop Operator ensuring the following parameters are in place:

- Conflict of Interest (CSE Board Members and Employees)
- Financial Disclosures (Board and Key Employees)
- Firewalls
- Oversight, Monitoring, and Evaluation of Performance (Fiscal and Programmatic)

**RECOMMENDATION**

The Board of Directors approve CSE to make application to the State Board to serve as One-Stop Operator based on Florida Workforce Development Association procurement process and recommendation.

# Public Notices & Procurements

## Public Notice

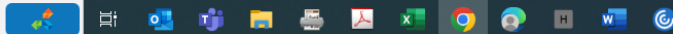
### [RFP ONE-STOP OPERATOR](#)

This Request for Proposal has been issued on July 28, 2023 for the Workforce Innovation and Opportunity Act (WIOA) One-Stop Operator for CareerSource Palm Beach County. Proposals are due by August 28, 2023 via electronic submission only to Stacy Campbell-Domineck at [fwda.president@careersourcepolk.com](mailto:fwda.president@careersourcepolk.com).

The FWDA complies with the provisions of the Americans With Disabilities Act. If you are a disabled person requiring any accommodations or assistance, please notify Stacy Campbell-Domineck at: [fwda.president@careersourcepolk.com](mailto:fwda.president@careersourcepolk.com). Women and minority businesses are encouraged to submit proposals. FWDA reserves the right to reject any or all proposals. Pursuant to the Steven's Amendment Consolidated Appropriations Act of 2018, Pub. L. No. 115- 141, 132 Stat. 348, div. H, Title V, Sec. 505 (Mar. 23, 2018) the percentage of the total costs of the program or project which will be financed with Federal money is 100 percent. The dollar amount of Federal funds for the project or program is up to a maximum of \$25,000.00. The percentage and dollar amount of the total costs of the project or program that will be financed by nongovernmental sources is 0 percent.



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# PROPOSAL

## ONE-STOP OPERATOR FOR CAREERSOURCE PALM BEACH COUNTY, INC.

ISSUE DATE: July 28, 2023

**PROPOSALS DUE: August 28, 2023**

**Submitted By:** Julia Dattolo, President and Chief Executive Officer  
CareerSource Palm Beach County, Inc.  
3400 Belvedere Road, West Palm Beach, FL 33406

Phone: (561) 340-1060 Ext. 2363; 561-312-5904

E-mail Address: [jdattolo@careersourcepbc.com](mailto:jdattolo@careersourcepbc.com)

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# PROPOSAL COVER SHEET

Entity Name: CareerSource Palm Beach County, Inc.  
Entity Physical Address: 3400 Belvedere Road West Palm Beach, FL 33406  
Entity Mailing Address: 3400 Belvedere Road West Palm Beach, FL 33406  
Phone Number: (561) 340-1060 ext. 2363  
Email Address: [jdattolo@careersourcepbc.com](mailto:jdattolo@careersourcepbc.com)  
FEID#: 65-0709274  
Type Of Entity: 501(c)(3), Local Workforce Development Board

**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:**

Name: Julia Dattolo  
Title: President and Chief Executive Officer (CEO)  
Phone Number: (561) 340-1060 ext. 2363  
Email Address: [jdattolo@careersourcepbc.com](mailto:jdattolo@careersourcepbc.com)

**Secondary Contact:**

Name: Steven Gustafson  
Title: First Vice President and Chief Operating Officer (COO)  
Phone Number: (561) 340-1060 ext. 2208  
Email Address: [sgustafson@careersourcepbc.com](mailto:sgustafson@careersourcepbc.com)

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 an individual with the authority to bind the entity.**

Julia Dattolo, President and CEO

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



**\*Signature of Authorized Representative**

8/24/23

**Date**

## **I. GENERAL PROVISIONS AND ASSURANCES**

CareerSource Palm Beach County, Inc. Board of Directors 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, AND OTHER PROVISIONS**

As a condition of funding from CareerSource Palm Beach County, Inc. 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 Palm Beach County 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 Palm Beach County 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 Palm Beach County. 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 Palm Beach County, Inc., the 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 Palm Beach County Inc., 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 Palm Beach County. 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 Palm Beach County.

**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. 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 Palm Beach County Board of Directors may unilaterally terminate or modify this 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 Palm Beach County 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 Palm Beach County.
- 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 Palm Beach County Inc., 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 Palm Beach County for damages sustained for any breach of this modified agreement by the Proposer, including court costs and attorney fees, when the cause is attributable to the Proposer.

In instances where Proposers/sub-grantees violate or breach modified agreement terms, CareerSource Palm Beach County Inc., 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 200.322 and the requirements stated therein.

**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:

- a. 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.
- b. 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.

**18. STEVENS AMENDMENT**

CareerSource Palm Beach County, Inc. is the direct service provider for various workforce programs supported by the U.S. Departments of Labor, Health and Human Services, Education, and other agencies as part of awards totaling \$15,851,406 (revised annually). Unless otherwise stipulated, all statements, news releases, requests for proposals, bid solicitations and other applicable documents are fully funded from federal sources.

CareerSource Palm Beach County, Inc.

Proposer


Julia Dattolo, President and CEO

Name and Title of Authorized Representative

  
Signature

8/24/23  
Date

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 **IRS** Department of the Treasury  
Internal Revenue Service  
P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0752435463  
Oct. 20, 2014 LTR 4168C 0  
65-0709274 000000 00  
00020435  
BODC: TE

 CAREERSOURCE PALM BEACH COUNTY INC  
% ERICA SCARPATI  
3400 BELVEDERE RD  
WEST PALM BCH FL 33406-1525

000579

Employer Identification Number: 65-0709274  
Person to Contact: CUSTOMER SERVICE  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Oct. 08, 2014, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in JUNE 1998.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

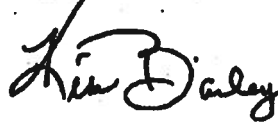
Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0752435463  
Oct. 20, 2014 LTR 4168C 0  
65-0709274 000000 00  
00020436

CAREERSOURCE PALM BEACH COUNTY INC  
X ERICA SCARPATI  
3400 BELVEDERE RD  
WEST PALM BCH FL 33406-1525

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Kim D. Bailey  
Operations Manager, AM Operations 3



## B.2. ENTITY'S ORGANIZATIONAL STRUCTURE AND QUALIFICATIONS

### B. 2. a. Organizational Structure:

CareerSource Palm Beach County, Inc. is a private not-for-profit corporation registered under Section 501(c) (3) of U.S. Internal Revenue Code. A board of directors comprised of volunteers who represent private sector business, economic development, education, organized labor, community-based organizations, and local government agencies govern CareerSource Palm Beach County, Inc.

See B.2. a. (Attachment), Organizational Structure Form at the end of this section.

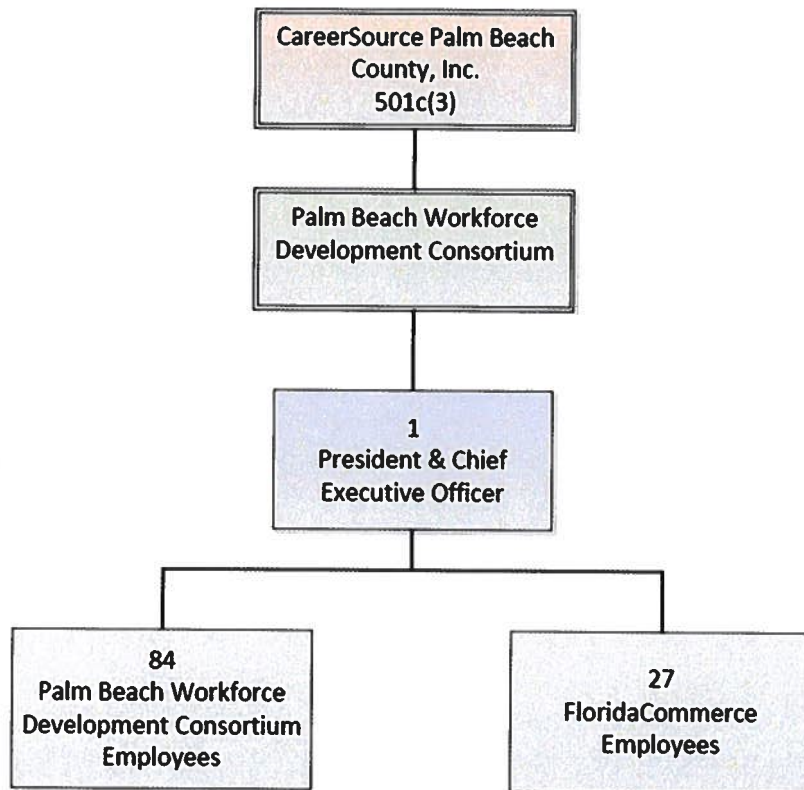
B. 2. b., c., d., e., and g. are included in the form, **Organizational Structure**.

### B. 2. f. - Board of Directors:

The members of the Board of Directors are displayed in the chart below.

Name	Organization	Term
Christopher Cothran (Chair)	NextEra Energy Resources	7/12/22-7/11/26
Ava Parker	Palm Beach State College	7/12/22-7/11/28
John Anthony Boggess	Palm Beach Christian Academy	7/12/22-7/11/30
Mel Coleman	Nova Southeastern University	7/12/22-7/11/28
Alex Dobin	NextEra Energy Inc.   Florida Power and Light Company	7/12/22-7/11/30
Zachary Cassidy	AFL/CIO	7/12/22-7/11/30
George T. Elmore	Hardrives Inc.	7/12/22-7/11/26
David Gobeo	FordHarrison, LLP	12/06/22-12/05/29
Shirley Erazo	Delray Beach Housing Authority	7/12/22-7/11/26
Laurie George, Ph.D.	United Way of Palm Beach County	7/12/22-7/11/24
David Talley	N/A	7/12/22-7/11/28
Dwight Mattingly	Amalgamated Transit Union, Local 1577	7/12/22-7/11/28
Connor Lynch, ARM, AIP	Plastridge Agency Inc.	7/10/18-7/9/24
Timothy Dougher	Business Development Board of Palm Beach County, Inc.	7/12/22-7/11/28
Richard Radcliffe	Palm Beach County League of Cities	7/12/22-7/11/26
David K. Markarian, Esq. (Chair Elect)	The Markarian Group	7/12/22-7/11/28
Alyssa Freeman	Marine Industries Association of Palm Beach County, Inc.	7/12/22-7/11/26
Libbey Webb	Dawson-Williams, Inc.	7/12/22-7/11/26
Deana Pizzo	I.T. Solutions of South Florida	5/16/23-5/15/29
Ricky Wade	McDonalds Restaurants	7/12/22-7/11/28
Tatiana Messerole	Florida Crystals	4/5/22-4/4/25
Commissioner Marci Woodward	Palm Beach County Board of County Commissioners	1/1/23-12/31/23

**B. 2. h. Organizational structure chart showing size and positions:**



**Locations:**

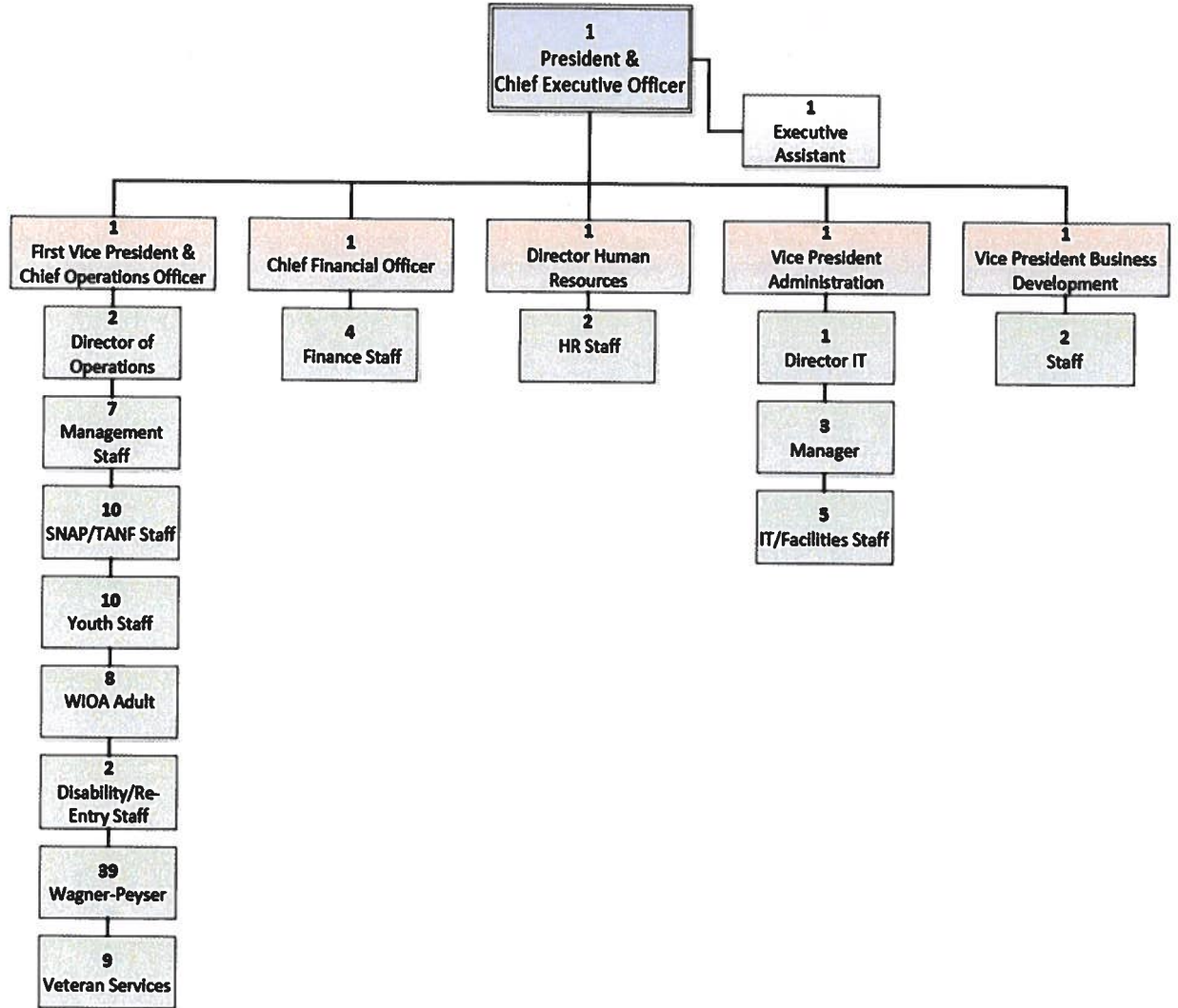
3400 Belvedere Road  
West Palm Beach, FL 33406

1085 South Main Street  
Belle Glade, FL 33430

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**B.2. a. (Attachment) - Organizational Structure Form:**

1. Name of Organization: CareerSource Palm Beach County, Inc.
2. Contact Person: Julia Dattolo e-mail: jdattolo@careersourcepbc.com
3. Address: 3400 Belvedere Road, West Palm Beach, FL 33406
4. Telephone Number: (561) 340-1060 Ext. 2363 5. FEID Number: 65-0709274
6. DUNS Number: 613975965
7. The Proposer's organization operates as (check as applicable):  
 a public agency (specify): Local Workforce Development Board.  
 a corporation incorporated under the laws of the State of: Florida.
8. Check to indicate if your organization is:  community-based organization (CBO),  
 minority-owned enterprise,  female-owned enterprise
9. The proposer's organization operates on:  not-for-profit,  profit basis
10. The proposer certifies  without exception,  with exception, as explained on the attached, that:
  - a. it has no outstanding liens, claims, debts, judgments, or litigation pending against it, which would materially affect its programmatic or financial abilities to implement and carry out its proposed program.
  - b. It has not been required to comply 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 or services.
  - c. It is current in its payment of applicable Federal, State, and local taxes.
  - d. It is free and clear of any disallowed audited costs.
  - e. its costs and pricing data submitted with this proposal are representative of only those reasonable, allowable, and allocable costs necessary for carrying out its proposed program.
  - f. It will comply with WIOA and its promulgated rules and regulations.
  - g. It is authorized to submit this proposal in accordance with the policies of its governing body; and
  - h. The attached certification for suspension or debarment has been signed by the organization's authorized person.

By my signature, I am empowered and can act on behalf of the proposing organization in submitting this proposal. I certify that the information contained herein is true and correct to the best of my knowledge, that the offer contained herein is true and correct to the best of my knowledge, and that the offer contained herein is firm and valid for a period not to exceed 60 days from this proposal's date.

**Organization Name:** CareerSource Palm Beach County, Inc.

**Location Address:** 3400 Belvedere Road, West Palm Beach, FL 33406

**Name of Authorized Official:** Julia Dattolo

**Signature:** 

**Date:** 8/24/23

## **B.3. QUALIFICATIONS**

### **B.3.a. Provide relevant entity history:**

CareerSource Palm Beach County, Inc. (CSPBC) is a private not-for-profit corporation registered under Section 501(c) (3) of U.S. Internal Revenue Code. CSPBC is the designated administrative entity and sub-state grantee for the LWDA 21 and has been chartered by the Governor as the local workforce development board. As such, CSPBC oversees the planning and implementation of a variety of welfare reform and workforce development programs in Palm Beach County.

CSPBC was approved to be a Direct Service Provider on November 1, 2007, and has operated under the Direct Service Model since that time providing services to WIOA adult, youth, and dislocated workers. In the Direct Services Model, CSPBC has reduced costs, enhanced operations, and improved the image and knowledge of the local career center system in the communities served. As the direct services provider, CSPBC has met and/or exceeded the State's Individual Training Account (ITA) Expenditure Requirement each year since enactment.

The Direct Service Model operated by CSPBC is relevant to the organization's request to serve as its own One-Stop Operator; as a study published by [Social Policy Research Associates](#) found that a majority of operators also provided direct services in the career center. Serving as a direct service provider enabled operators to leverage their program funding to support functions that supported career center-wide operations.

CSPBC has served as its own One-Stop Operator since July 1, 2020, following the resignation of our previous One-Stop Operator, Cambridge Consulting, LLC. After several failed procurements, CSPBC's Board of Directors recommended a petition to the CareerSource Florida State Board of Directors to serve as our own Operator. The application was submitted to the Florida Department of Economic Opportunity (DEO) on August 26, 2020, and approved by the CareerSource Florida Board of Directors on June 9, 2021, for a period of three (3) years.

Since assuming the role of One-Stop Operator, both officially and unofficially, CSPBC has continued to enhance service integration amongst career center programs and partners for the benefit of the customer. Additionally, during our time serving as our own On-Stop Operator, we have worked to establish firewalls to ensure the role of the One-Stop Operator is carried out in accordance with federal and state guidance and regulations.

### **B.3.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.**

From 2021-2023, CSPBC's COO, Steven Gustafson, served as part of an advisory committee that oversaw the assessment of the Southeastern Employment and Training Association (SETA) to determine necessary enhancements to the organization, to include conference program design, website revitalization, and membership dues.

CSPBC's CEO Julia Dattolo and COO Steven Gustafson serve as members of the advisory committee for the United Way of Palm Beach County's Mission United.

### **B.3.c. List of recent assessments (within the 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:**

1. Nondiscrimination Program Desk Review Questionnaire, Program Year (PY) 2022
2. CSPBC Annual Performance Report, PY 2021
3. Nondiscrimination Program Desk Review Questionnaire, PY 2021
4. CSPBC Annual Performance Report, PY 2020

**B.3.d. Explain experience in conducting assessments of federal grant programs, including but not limited to WIOA, Wagner-Peyser, Veterans, and TANF/SNAP:**

Since the Workforce Investment Act (WIA) of 1998 to the current day Workforce Innovation and Opportunity Act (WIOA) of 2014, CSPBC has been conducting assessments for workforce programs, including but not limited to WIOA, Wagner-Peyser, Job for Veterans State Grant (JVSG), Trade Adjustment Assistance (TAA), Rapid Response, Temporary Assistance for Needy Families (TANF), and Supplemental Nutrition Assistance Program (SNAP).

Presently, CSPBC utilizes Geographic Solution's VOSGreeter® as the career center intake system to assess the scope of each customer's visit to the career center and directly communicate with the State's Management Information System (MIS) Employ Florida. This system empowers staff to quickly triage customers and identify the proper service level and/or resources necessary to assist them with accomplishing their career goals and objectives. Additionally, CSPBC is the first local area in Florida to test Geographic Solution's Eligibility Explorer, a simplified tool that allows customers to utilize their Employ Florida registration to determine eligibility and apply for programs, including, but not limited to, WIOA Adult and Dislocated Worker. CSPBC is working to have this new tool fully integrated by January 2024 to further streamline the manner in which customers are assessed and introduced to programs and services offered through the career center.

Staff guided initial and objective assessments serve as the foundation for the delivery of individualized career and training services, to include career planning. Staff utilize the assessment wizard within Employ Florida to ensure all barriers and needs are identified during the assessment, allowing the formation of an employment plan that establishes realistic goals and objectives while identifying plans and resources to overcome potential barriers to employment or the completion of training. Using the wizard from Employ Florida promotes consistency across programs and enables the ability to assess customers both in-person and remotely.

It is the intent of CSPBC to increase the delivery of career services and screening tools to diverse populations and assist them in finding employment and training in a career that best fits their employment goals through a no wrong door system of entry that encompasses the foundations of trauma informed care. These populations may include low-income individuals, individuals underrepresented in targeted industries, dislocated workers, individuals with disabilities, veterans, and other populations with training and employment barriers, who are most in need of these services.

When developing assessment tools, individuals with disabilities (as defined in 29 CFR Part 37.4) are accommodated according to Section 188 of the WIOA (implementing regulations at 29 CFR Part 38), Section 504 of the Rehabilitation Act of 1973 (DOL implementing regulations at 29 CFR Part 32), and Title II of the Americans with Disabilities Act, and if applicable (implementing regulations at 28 CFR Part 35) taking into consideration guidelines associated with the assessment test and State law or policies.

**B. 3. e. - Explain how your firm can provide continuity of staff:**

CSPBC will hire qualified programmatic and technical staff that have the expertise to meet the goals, objectives, and requirements of the One-Stop Operator. The experience, abilities, and motivation of staff play a critical role

in the ultimate success of service delivery.

CSPBC will ensure that staff are trained to effectively carry out One-Stop Operator duties, and ensure ongoing training is conducted to keep staff abreast of new policies and procedures. The current staff member who will ensure the One-Stop Operator's performance under this RFP has been on board since 2012.

### **B. 3. f. - Explain internal quality assurance practices and procedures:**

CSPBC uses a quality control process to detect and reduce fraud and errors in data collection, eligibility determinations, and service delivery. All staff are responsible for errors, and fraud detection and reduction. The respondent utilizes peer-to-peer and third-party internal monitoring techniques and also employs the use of an outside monitoring vendor through Taylor, Hall, Miller, Parker, P.A. (THMP).

Ultimately, the President and CEO is responsible for ensuring quality assurance is in place and operational. However, the President and CEO relies on the COO and key members of the Operations Support Team (Manager of Compliance Training and Monitoring and Quality and Program Analyst) to carry out the quality assurance functions. The Manager of Compliance Training and Monitoring is responsible for developing a monitoring guideline each year and ensuring the actions within are carried out by program department leadership.

### **1. Program Monitoring Roles & Responsibilities**

#### **a. Manager of Compliance Training and Monitoring:**

- The Manager of Compliance Training and Monitoring will be responsible for ensuring that internal monitoring is occurring based on the predetermined schedule, as detailed in the table below and as detailed in the Program Monitoring Schedule established annually.
- The Manager of Compliance Training and Monitoring will track and report internal monitoring results and corrective action reports, identify trends and regional issues, and provide this compiled information to the Chief Operating Officer (COO) per schedule.
- The Manager of Compliance Training and Monitoring will conduct meetings and discuss improvement strategies with Program Managers, Center Managers, and Department Supervisors, as needed.

#### **b. Quality Assurance (QA) Monitor:**

- For the regional monitoring conducted by the Quality Assurance Monitor, the Manager of Compliance Training and Monitoring will randomly identify the sample for the review period as outlined in the "File Review" section.
- The Manager of Compliance Training and Monitoring will create a schedule for the dates for the monitoring. He/she will notify the QA Monitor and Directors of the dates the monitoring will occur in the centers.
- The QA Monitor will conduct the monitoring in each of the centers according to the predetermined schedule using the Quality Assurance/State Monitoring Tools, via online or spreadsheet to capture their results.
- The QA Monitor will conduct debriefings following program monitoring to center staff and for ensuring appropriate corrective action for each monitoring is completed and entered in the QA tools database.
- The QA Monitor will maintain a master Corrective Action spreadsheet and conduct periodic spot checks for corrective action, as needed and appropriate.
- CAPs will be tracked by the Manager of Compliance Training and Monitoring for compliance.

## 2. File Review

### a. Tri-Annual

On a tri-annual basis, the Quality Assurance Monitor (QA) will review the below:

Welfare Transition (WT): 10 case files per center

Wagner-Peyser (WP):

- 1-2 WP Placements/Referrals for Appropriateness per Career Consultant/Recruiter for a minimum of 15 per center
- 15 WP Job Seeker Services per center
- 10 WP – JVSG case files
- 10 WP – MSFW case files
- 15 Job Orders (5 AG and 10 Non-AG)

RESEA: 10 case files at each center

### b. Bi-Annual

On a bi-annual basis, the Quality Assurance Monitor (QA) will review the below:

WIOA Adult/Dislocated Worker: 10 case files per center

WIOA YOUTH: A sample of up to 10 case files

SNAP: 10 case files per center

### c. Annual

File review criteria is based on State monitoring tools and/or those used by external auditors and updated, as necessary, based on findings, other non-compliance issues and observations. The nature of monitoring and sample size for monitoring is subject to change. For example, during periods of transition due to new state/federal program requirements or guidance, new or revised state programmatic monitoring tools or the lack thereof, or trends identified during internal and external program monitoring reviews.

## 3. Debriefing

- Within 7 days, the QA Monitor will provide a report summarizing the program monitoring results to the respective Department Supervisor, Center Manager, Program Manager, Directors and Manager of Compliance Training and Monitoring.
- Within 7 days of receipt of the monitoring results, the Department Supervisor/Program Manager will be required to complete and enter corrective action for any findings, other non-compliance issues or observations in the QA Monitoring database.

## 4. Corrective Action Plans (CAPs)

- The QA Monitor and/or Manager of Compliance Training and Monitoring will monitor CAPs as evidenced by reports noting the completed corrective action for any findings, other non-compliance issues and observations as recorded in the QA Monitoring database.
- Program Supervisors are required, if after a QA Monitoring review, to:
  1. randomly collect and monitor three (3) additional case files as “Desk Reviews” if three (3) or more findings related to the same staff member were found by the QA Monitor for the same review period; or
  2. randomly collect and monitor five (5) additional case files as “Desk Reviews” if 30% or more findings were similar (i.e., failing the same monitoring element on the QA/review tool) for the same period.

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**5. Continuous Improvement**

**STEP #1:** As appropriate from the monitoring, relevant Program Manager conducts staff training, develops, or updates on-boarding training manuals and/or policies and procedures, job aides, tools, forms, etc. to incorporate as new program guidance and provides to Manager of Compliance Training and Monitoring and the Quality and Program Analyst for review.

**STEP #2:** Once new or updated documentation is developed, the Program Manager is to have staff review and acknowledge that they understand the document(s), through CSPBC's training platform, KnowBe4.

**STEP #3:** Program Manager meets with Manager of Compliance Training and Monitoring to review and revise monitoring tools or any needed staff training with the QA Monitor, as needed.

**STEP #4:** Manager of Compliance Training and Monitoring documents all corrective actions as part of continuous improvement in a database and check that such corrective actions were completed.

**6. Tracking Process**

(Based on timing detailed in the Program Monitoring Schedule):

**a. Bi-monthly Basis:**

- Staff Peer Reviews and Programmatic Supervisor Evaluations (e.g., for WTP, WIOA Adult/DW, WP, RESEA, SNAP and WIOA Youth) are to be inputted into the applicable web-based QA Monitoring database.
- Programmatic Supervisors will input all CAPs into applicable web-based QA Monitoring database.
- Once approved by the Manager of Compliance Training and Monitoring, the QA Monitor will distribute the "Bi-monthly Supervisor Compliance Report" to the Program Supervisors, Managers, Directors, and the COO.

**b. Tri-annual Basis:**

For WTP, WP (JVSG, Job Order, MSFW, and RESEA), QA Monitor to track findings and summarize CAP plans for internal QA monitoring as evidenced by reports and provide summarized information to the COO and Manager of Compliance Training and Monitoring.

**c. Bi-annual Basis:**

For WIOA Adult/DW, Youth and SNAP, the QA Monitor is to track findings and summarize CAPs for internal QA monitoring as evidenced by QA Monitoring database reports and provide summarized information to the Manager of Compliance Training and Monitoring.

**7. Tracking Schedule**

<b>CSPBC 2023 QA TRACKING SCHEDULE</b>		
<b>Program Monitoring Data / Report</b>	<b>Timing</b>	<b>Person Responsible</b>
Supervisor Staff Peer Review and Compliance Report	Bi-Monthly	QA Monitor
QA Program Monitoring Findings & Corrective Action Report "Roll-Up"	Tri-Annually	Manager of Compliance Training and Monitoring
QA Program Monitoring Annual Report	Annually	Manager of Compliance Training and Monitoring

### 8. Program Monitoring Schedule

On an annual basis, the QA Monitor with the Manager of Compliance Training and Monitoring establishes a detailed date-specific Program Monitoring Schedule based on the schedule format in the following table. The Program Monitoring Schedule is a flexible document subject to change and may be updated according to organizational priorities and staff schedules.

<b>CSPBC 2023 QA PROGRAM MONITORING SCHEDULE</b>		
<b>NOTE: DUE DATE IS THE END OF THE MONTH</b>		
<b>MONTH</b>	<b>PROGRAM</b>	<b>REVIEW PERIOD</b>
January	WP-Placements & WP-Jobseekers	September - December
	<b>January 30 - February 03 (DEO ANNUAL MONITORING)</b>	<b>October 01, 2021 – December 31, 2022</b>
February	WP-Job Orders & WP-JVSG	October - January
March	WTP, WP-MSFW & RESEA	November - February
April	WIOA A/DW, WIOA Youth & SNAP	September - February
	<b>THMP SEMI-ANNUAL MONITORING</b>	<b>October 01, 2022 - March 30, 2023</b>
May	WP-Placements & WP-Jobseekers	January - April
June	WP-Job Orders & WP-JVSG	February - May
July	WTP, WP-MSFW & RESEA	March - June
August	WIOA A/DW, WIOA Youth & SNAP	May - August
September	WP-Placements & WP-Jobseekers	May - August
October	WP-Job Orders & WP-JVSG	June - September
	<b>THMP SEMI-ANNUAL MONITORING</b>	<b>April 01, 2023 - September 30, 2023</b>
November	WTP, WP-MSFW & RESEA	July - October
December	Special Monitoring (as needed)	Any



## B. 4. REFERENCES

### **Reference #1**

**Organization Name:** Palm Beach State College  
**Location Address:** 812 Fern Street West Palm Beach, FL 33401  
**Contact Name:** Kimberly Lea  
**Title:** Dean of Workforce  
**Phone Number:** 561 868-3457  
**Email Address:** leak@palmbeachstate.edu  
**Service Dates:** Ongoing                      **Value of Contract:** N/A  
**Description of Work:** Eligible Training Provider

### **Reference #2**

**Organization Name:** Adult Education, Palm Beach County School District  
**Location Address:** 4200 Purdy Lane, Bldg 50, Palm Springs, FI 33461  
**Contact Name:** Fred Barch  
**Title:** Director, Adult and Community Education  
**Phone Number:** 561-649-6014  
**Email Address:** fred.barch@palmbeachschools.org  
**Service Dates:** Ongoing                      **Value of Contract:** N/A  
**Description of Work:** Eligible Training Provider

### **Reference #3**

**Organization Name:** Palm Beach County School District  
**Location Address:** 3300 Forrest Hill Blvd. Suite C-124, West Palm Beach, FI 33406  
**Contact Name:** Dr. Jeraline Johnson  
**Title:** Director of Choice and Career Academies  
**Phone Number:** 561- 434-8880  
**Email Address:** [jeraline.johnson@palmbeachschools.org](mailto:jeraline.johnson@palmbeachschools.org)

**Service Dates:** Ongoing

**Value of Contract:** N/A

**Description of Work:** Education partner

**B. 5. SERVICE TEAM'S QUALIFICATIONS**

**a. Identify proposed team members.**

Scot Frank

**b. For each proposed team member, list qualifications in terms of the overall experience, nonprofit or federal program assessment experience, and education. Resumes may be included.**

**(1) Overall experience.**

11 years of experience in workforce development.

**(2) Nonprofit or federal program assessment experience.**

11 years of experience in nonprofit and federal program assessments.

**(3) Education.**

The highest education level is a master's degree in human resources.

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## **B. 6. SCOPE OF WORK / SERVICE PLAN**

CSPBC has reviewed the Request for Proposal (RFP) and understands the service delivery required under this solicitation. With this understanding and knowledge of the RFP, the Respondent is prepared to deliver the services outlined below to meet the specifications set forth in the RFP. The services will be provided at the following locations, including other locations that CSPBC may identify:

- a. 3400 Belvedere Road, West Palm Beach, FL 33406 (comprehensive).
- b. 1085 S Main Street, Belle Glade, FL 33430 (satellite).

The One-Stop Operator will play a critical role in supporting the CSPBC workforce system by coordinating its diverse partners to achieve CSPBC's service delivery vision and any defined performance goals. Specifically, the One-Stop Operator will:

1. Develop, review, implement, and monitor appropriate Memorandum of Understanding (MOU) between CareerSource Palm Beach County Inc., and the one-stop partners to ensure the efficient operation of the one-stop delivery system in the local area. These functions will include at a minimum:

- a. **The required content of MOUs:**

CSPBC will develop and review the required content of the MOUs and oversee the execution and implementation of MOUs within the one-stop career center and affiliate sites. CSPBC will implement the approved MOUs with partnering agencies and programs to establish an integrated workforce system that extends beyond basic workforce services. The provisions of services will be included in the MOUs.

- b. **The manner in which the services will be coordinated and delivered through such system:**

CSPBC will use an Integrated Service Delivery Model for delivering services to customers throughout the region. All one-stop programs and partner services are fully integrated with an entire menu of services offered through the one-stop system. Common intake will be made accessible to customers through the Geographic Solutions VOS® Employ Florida program application. All functions are carried out with oversight from the CSPBC Board and committees.

The Integrated Services Model views all core programs as one workforce system, assessing strategic needs and aligning them with service strategies that ensure the workforce system meets the employment and skill needs of all workers and employers. CSPBC will collaborate with other career center partner programs, and other partners at the state and local levels to ensure the needs of CSPBC's customers are met. The Workforce Innovation and Opportunity Act (WIOA) and the State use a certification process and competition to help achieve this vision and ensure continuous improvement in the workforce's one-stop system.

CSPBC will coordinate with senior management and key partners on service delivery efficiencies and make recommendations for best practices and training options for continuous improvement. CSPBC will be responsible for compiling a list of services available through each required partner and making this list available to partners through the CSPBC intranet. CSPBC will develop

procedures that outline the referral mechanisms for each partner.

**c. How the costs of such services and the operating costs of such system will be funded:**

20 CFR 678.420 requires each required one-stop partner to provide access to its programs or activities through the one-stop delivery system, in addition to any other appropriate locations. They also must use a portion of the funds made available to the partner's program, to the extent consistent with the Federal law authorizing the partner's program and with Federal cost principles in 2 CFR parts 200 and 2900 to contribute to the infrastructure cost of the one-stop delivery system. One stipulation is that costs are allowable, reasonable, necessary, and allocable.

CSPBC will ensure the one-stop delivery system's operating budget and Infrastructure Funding Cost Agreements (IFA) are agreed to by each required partner. The Agreements will be formalized in the MOUs.

**d. Methods of referral of individuals between the one-stop operator and the one-stop partners for appropriate services and activities:**

CSPBC will ensure a referral system is formalized in the MOUs and step-action procedures. CSPBC will ensure procedures are in place to offer the appropriate services to participants registered or enrolled in a one-stop system program through direct services, or referral to a partner agency for services where appropriate. Such services may include:

- a. Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system.
  - b. Referral to housing assistance & other supportive services.
  - c. Referrals to the Jobs for Veterans State Grant program staff for services as appropriate in accordance with Administrative Policy 102.
  - d. Career consulting, planning, and job search assistance.
  - e. Personalized instruction to prepare for specific job interviews.
  - f. Occupational career training where applicable.
  - g. Intervention with potential employers on behalf of specific program participants where appropriate.
  - h. Supportive service assistance where allowable.
  - i. Child Care referrals as needed.
- 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:**

CSPBC will ensure practices are in place to meet the employment needs of workers and youth. Procedures will be operationalized in a manner that encourages staff and one-stop partners to provide services to individuals with disabilities, and other individuals with barriers to employment, including, those who may require longer-term services, such as intensive employment training, or education services.

In coordinating services and serving as the One-Stop Operator, CSPBC will encourage staff and one-stop partners to refrain from establishing practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services.

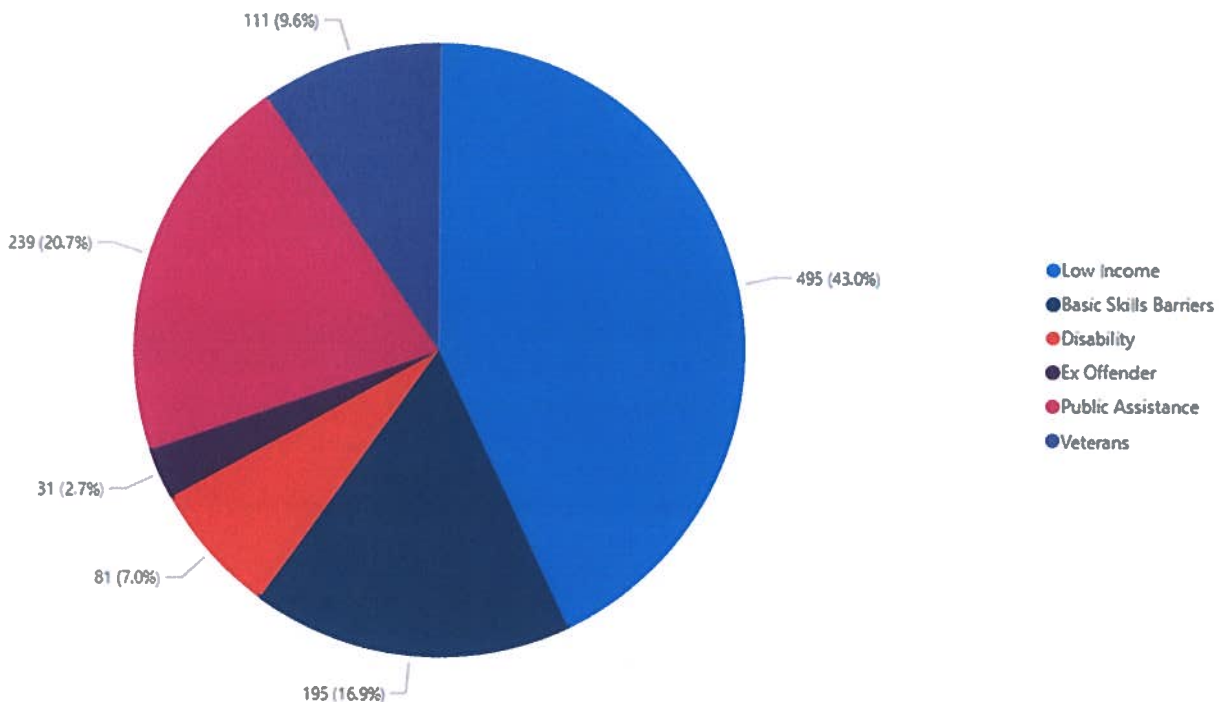
CSPBC will ensure at a minimum, at least once every three years CSPBC completes a comprehensive, assessment of the effectiveness, physical and programmatic accessibility, and continuous improvement of career centers and the one-stop delivery system.

Procedurally, an assessment is completed annually and includes compliance with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities, including providing staff training and support for addressing the needs of individuals with disabilities.

CSPBC will track services to individuals with barriers and other priority populations to ensure access to services is maximized using Microsoft Power Business Intelligence® dashboards available to all staff on the CSPBC Intranet. CSPBC will report out on these demographics and barriers twice annually to the CSPBC Board.

Select all	Adult	Dislocated Worker	National Dislocated Worker Grant (NDWG)	Statewide Adult	Statewide Dislocated Worker	Youth
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**WIOA Priority Participants**  
(Based on Participation Date)



- 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.**

CSPBC will ensure MOUs are fully executed with all required partner agencies. The MOUs will contain all the required elements as prescribed by 20 CFR 678.500, including 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 for the delivery of services.

- g. **Such other provisions, consistent with the requirements, as the parties to the agreement determine to be appropriate.**

CSPBC will perform additional relevant services at the option of the CSPBC Board and the President/CEO as necessary for the operations of the career center and affiliate sites. Additional services may include areas such as skill gap reviews, labor market studies, cross-regional labor market/labor studies and comparisons, and coordination with other workforce development boards and operators for 'regional' planning purposes.

**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 CSPBC staff), and meeting activities, facilitate meetings, and provide meeting notes.**

CSPBC will coordinate and hold up to four meetings with all mandatory and co-located one-stop partners. The meetings may be virtual, in-person, or other approved methods with the approval of the President/CEO. In conjunction with CSPBC staff, CSPBC will develop meeting agendas, 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.):**

CSPBC will use the FloridaCommerce Office for Civil Rights (OCR) Nondiscrimination Program Desk Review Questionnaire as objective criteria and procedures in assessing the effectiveness, physical and programmatic accessibility in accordance with section 188 and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.) The Questionnaire follows the organization of the FloridaCommerce Nondiscrimination Plan and is meant to ensure compliance with applicable civil rights laws and regulations.

CSPBC will ensure non-discrimination, whereas customers have an equal opportunity to access programs and services administered by CSPBC. No individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the

administration of or in connection with programs on the basis of race, color, religion, sex, national origin, disability, age, political affiliation, marital status, sexual orientation or status, and each customer shall have such rights as are available under any applicable Federal, State, or local law prohibiting discrimination.

- 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:**

CSPBC will establish and maintain linkages between all one-stop partners to improve communication, referrals, service delivery, and tracking of performance.

CSPBC will rely on CSPBC's Disability Navigator, IT staff, and program managers to lead in the development of strategies for technological improvements to facilitate access to improve the quality of services and activities provided through the one-stop delivery system.

The Disability Navigator is a critical component of the one-stop system. A primary role of the Navigator in the one-stop system is the formation of relationships across multiple programs that impact individuals with disabilities such as coordinating policy, service delivery, and other activities that improve access and opportunities for careers, and successful employment outcomes for individuals with disabilities.

They share the responsibility, alongside CSPBC management, of ensuring CSPBC staff, the One-Stop Operator, one-stop partners, and career centers and affiliate sites comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs, and services, technology, and materials for individuals with disabilities, including providing staff training and support for addressing universal access.

In addition to the virtual services that are available to CSPBC employers and job seekers, Employ Florida is available 24 hours a day, seven days a week providing access to employment opportunities, resume-building resources, etc. WIOA program applications, to include special grants, are available through the CSPBC website 24 hours a day.

During regular business hours, all career center visitors are logged through the VOS Greeter® system which communicates directly with Employ Florida, ensuring a seamless integration of career center intake and the State MIS. VOS Greeter® touch screen kiosks are available upon entry into the career center and staff are on hand to assist customers with completing the intake application.

During regular business hours, all career center visitors have the availability to use Accessible technology in our Resource Center. The following technology is available and updated yearly with our partners at Division of Blind Services:

**Fusion:** combines ZoomText screen magnification and visual enhancements for screen viewing and **JAWS** (Job Access with Speech).

Features (from their website) include:

- Magnification up to 60x with screen and cursor enhancements
- Includes scan and read option for image files, PEARL®, and flatbed scanners

- High-quality speech using Eloquence® and Vocalizer™ Expressive Instant access to any JAWS customization already in place.
- Remote desktop and Citrix terminal services options available
- Powerful keyboard access including navigation on the web
- Screen tracking synchronized with speech and Braille as you navigate and read
- Works with TypeAbility and J-Say

**Sorenson Video Relay:** Empowers the deaf and hard-of-hearing community to communicate with both deaf and hearing business contacts using video relay service. Users can connect with an ASL interpreter via video for real-time interpretation. (Members of the deaf community now mostly use apps on their smartphones.)

Center visitors may also have use of large print/braille keyboards.

- 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:**

CSPBC's Board of Directors ensures processes are in place that will enable the organization to exceed the highest standards set by the CareerSource Florida Board of Directors. These processes are the fabric of the Direct Services Model. The CSPBC Board of Directors believes the continuous process improvement model, conducted through human-centered design principles, should be the cornerstone of the CSPBC Direct Services Model. The Board also believes that having the right policies and procedures in place improves the coordination of services across one-stop partner programs, enhances service delivery, and improves efficiencies within the system.

The Direct Services Model is flexible for day-to-day operations. It provides the system with the capability to react more quickly to changing conditions in the workforce environment. A value-added benefit allows greater resources to be allocated to serve more people and provide more services to meet the specific needs of each customer. The model enhances the design and implementation of common intake, data collection, performance measurement, and reporting.

All one-stop programs and partner services are fully integrated with an entire menu of services offered through the one-stop system. All functions are carried out with oversight from the CSPBC Board, the Executive Committee, and the Youth and Young Adult Outreach (Youth) Committee.

CSPBC will use the CSPBC Direct Services Model as the starting point to evaluate efficiencies and develop strategies to improve the coordination of services across one-stop partner programs and service delivery. CSPBC will also incorporate customer satisfaction initiatives, such as annual customer surveys as part of the evaluation process.

- 3. Develop Quarterly Reports:** In conjunction with CSPBC 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 CSPBC website, <https://www.careersourcepbc.com>.

CSPBC will work with CSPBC staff to develop an appropriate mechanism to report on the progress and performance of the partnerships across the system. Some examples of system reporting may include:



- a. Quarterly or annual One-Stop Operator's Report focusing on requirements prescribed in law.
- b. Annual customer satisfaction surveys developed using Qualtrics.

**B. 7. Price (Budget Details), a.: Propose a total price to perform the scope of work identified for one-stop operator services for December 1, 2023, through June 30, 2024.**

<b>Direct Services</b>	<b>Budget Request 12/1/2023-6/30/2024</b>
Salaries/Per Hour (List each position on a separate line with hourly rate)	
Scot Frank (12% of salary) Prorated for seven (7) months	\$5,385.00
<b>Total Salaries</b>	<b>\$5,385.00</b>
Benefits	\$2,394.00
Supplies	125
Rent/Lease	475
Utilities	75
Phone	125
Postage	20
Travel – Staff	\$500.00
Other: Specify each Item	
Indirect % (approved rate of 18.12%)	\$1,649
<b>Total</b>	<b>\$10,748</b>

<b>Position/Job Title</b>	<b>Annual Salary</b>	<b>% Charged to this Proposal</b>
Scot Frank, Operations Review Specialist	\$76,937	12% (Prorated for seven (7) months)
<b>Total</b>	<b>\$76,937</b>	<b>12% of total costs</b>

**B. 7. Price (Budget Details), b.: Provide estimated cost for each of the three (3) subsequent years under this procurement.**

The estimated cost for each of the three subsequent years under this procurement is \$18,500 per year.

**DRAFT MINUTES**  
**CAREERSOURCE PALM BEACH COUNTY, INC.**  
**BOARD OF DIRECTORS MEETING**  
**OCTOBER 19, 2023**

**I. CALL MEETING TO ORDER, WELCOME**

The meeting was audio and video recorded with a written transcript. Christopher Cothran welcomed attendees and called the meeting to order at noon. A quorum was present with the following board members attending Alex Dobin, Alyssa Freeman, Christopher Cothran, Connor Lynch, Cynthia Gaber, David Gobeo, David Markarian, David Talley, Deana Pizzo, George Elmore, John Boggess, Laurie George, Richard Radcliffe, Shirley Erazo, Tatiana Messerole, Timothy Dougher and Zachary Cassidy. Board members absent were Ava Parker, Marci Woodward, Ricky Wade, Libbey Webb and Mel Coleman,

**II. AGENDA APPROVAL**

- a. Proposed Amendments: Christopher Cothran asked if there were any amendments to the agenda. There was none.
- b. Approval of Agenda: Christopher Cothran called for a vote to approve the agenda.

Motion: David Talley  
Second: George Elmore  
The motion passed unanimously.

**III. PUBLIC COMMENTS: None.**

**IV. CONSENT AGENDA**

- a. Minutes from June 15, 2023
- b. 2024 CareerSource Palm Beach County, Inc. and Palm Beach Workforce Development Consortium Board of Director and Committee Meeting Schedule
- c. Approval of Board Membership
- i. Mike Burke, Superintendent, Palm Beach County School District
  - ii. Kris Hopkins, Port Agent-Post Everglades, Seafarers International Workers
- d. Board of Director Resignation
- i. Dwight Mattingly, President/Business Agent, Amalgamated Transit Union, Local 1577 Resignation effective August 23, 2023
- e. Approval of New Financial Planning Committee Member
- i. Dave Markarian
- f. Approval of Lease Renewal Between CareerSource Palm Beach County, Inc., and Palm Beach County (Central Career Center)
- g. Approval to Amend CareerSource Palm Beach County, Inc. Procurement Policies and Procedures (Delegation of Signatory Authority Levels)
- h. Prior Approval Request to Transfer Funds from WIOA Dislocated Worker to WIOA Adult
- i. CareerSource Palm Beach County, Inc. Amended Bylaws
- i. Dissolution of the One-Stop Delivery System Committee
  - ii. Emeritus Board Members
- j. Approval of a Three-Year Extension to the President & CEO, Julia Dattolo's Employment Agreement Beginning January 1, 2024, and Ending December 31, 2026

Christopher Cothran asked the board to review the consent items and after reviewing them, asked if they wished to pull any item. Hearing none, he called for a motion to approve the consent agenda items a. through j.

Motion: Richard Radcliffe  
Second: Alex Dobin  
The motion passed unanimously.

## V. INFORMATIONAL

- a. Board of Directors Attendance Record: A copy of the board attendance table was included in the agenda packet. Any Director failing to attend four consecutive regular Board meetings without excused absence as determined by the Executive Committee shall be considered to have voluntarily resigned.
  - b. CareerSource Palm Beach County selected to serve as One-Stop Operator for PY 2023-2026 (Julia Dattolo): In February 2023 the Executive Committee and board of directors approved CareerSource Palm Beach County, Inc. to be the one stop operator. A requirement of CareerSource submitting a proposal by CareerSource Florida, Inc. and the Florida Department of Commerce was that the RFP be re-issued by a third party. CareerSource Polk reissued the RFP and one proposal was submitted by CareerSource in response to the re-issued RFP. CareerSource Polk recommend to award the one stop operator contract to CareerSource Palm Beach County, Inc. Christopher Cothran referred the board to the backup supporting documentation included in the meeting agenda packet for this item. The board approves CareerSource Palm Beach County, Inc. as the one stop operator. He then asked if there was any comments or questions. There were none.
  - c. 2023-2024 Local Targeted Occupations List (LTOL) (Julia Dattolo): Adjustments to the list were made as proposed by the state. The updated list adds new occupations and removes some existing occupations.
  - d. Communications Analytics Report (Tom Veenstra): The use of social media through Facebook, X, Instagram, LinkedIn and the website to promote services was shown in a PowerPoint presentation. The number of clicks, likes, tweets, followers, visits, shares and impressions was discussed. Facebook continues to be the most popular and preferred method of communication with 90% of job leads coming from Facebook. Print/online, media clips are still being used but its audience has decreased.
  - e. Business Services Update (Charles Duval): Outreach efforts in the Glades and our presence in the community was discussed. A job fair was held in the Glades with 300 attendees who came to apply and look for jobs with employers Amazon, Coca-Cola, US Sugar, Lakeside Medical, Tellus Products and Florida Crystals. Finfrock is employing job seekers through CareerSource Palm Beach County, Inc.'s On-the-Job-Training program. We assisted Culver's in the opening of their new Loxahatchee location creating 90 jobs. CareerSource Palm Beach County, Inc. had a booth at the Hispanic Heritage Festival. The Lewis Center for the Homeless is providing transportation to the career centers so we can provide career services to those job seekers. Staff provided an orientation to our services at the Farmworker Coordinating Council. Charles Duval spoke about CareerSource Palm Beach County, Inc., jobs and apprenticeships when he appeared on South Florida PBS.
  - f. TANF/SNAP Update (Sandra Wright): The average wage rate increased 9.8 % to \$16.38 per hour. The number of CareerSource job seekers receiving food stamps decreased 46%. A young adult job seeker success story was presented who was facing homelessness and after being provided referrals to our community partners and enrolling in the subsidized work program, within two months obtained full-time employment earning \$20 per hour with the School District of Palm Beach County. The job seeker's son was also assisted and obtained full-time employment earning \$28 per hour with Florida Crystals.
- Veterans Update (Cody Melton): The primary performance indicator measures, number of participants served, race, ethnicity, gender, wage rate data and funding expenditures for the Veterans, Wagner-Peyser and WIOA programs for the period July 2022-June 2023 was shown in a PowerPoint presentation. The final results will be compiled by the state and available in February 2024. All goals have been met or exceeded and wage rates increased in all programs except WIOA Dislocated Worker. An active duty (U.S. Army) job seeker success story was presented. The job seeker enrolled in CareerSource's Careers for Veterans SkillBridge program paid for with the Careers for Veterans Grant, completed an internship and obtained full-time employment through on the job training earning \$22.50 per hour.

- g. President & CEO Update (Julia Dattolo): The year in review was shown in a PowerPoint presentation noting sustained low unemployment rates, job seekers and employers served, a return of women to the workforce, hiring events/job fairs and funding awards. As part of CareerSource Florida, Inc.'s Transformation Plan, CareerSource Palm Beach County, Inc. is partnering with local workforce development area 20 for the purpose of specific system wide improvements for consistency, improved customer experience and efficiencies in technology, administration, fiscal, procurement, contracts, programmatic policies and other identified areas. Senate Bill 240 requires the chair of each local workforce development board to appoint members to a local Education and Industry Consortium composed of representatives of educational entities, businesses and local leaders who will provide independent information from stakeholders in their local area. CareerSource Palm Beach County, Inc. has already been meeting with the required members, which will now be formalized as a Consortium with the CareerSource Palm Beach County, Inc. Board Chair's approval. CareerSource Palm Beach County, Inc. board members are not allowed to serve on the Consortium. Funding for PY 23/24 has decreased and adjustments have been made. Alternative sources of revenue are being pursued. The Five Pillars of CareerSource Palm Beach County, Inc.'s Strategic Initiatives was discussed. Through a human centered design approach, we are using feedback from customers to improve our services and facilities.

**VI. COMMITTEE REPORTS (Active)**

- a. Executive Committee – October 6, 2023
- b. Financial Planning Committee – October 6, 2023
- c. Youth and Young Adult Outreach Committee – September 14, 2023
- d. One-Stop Delivery System Committee – Current
- e. Consortium Meeting – Current

The minutes from each of the above committee meetings was included in the board packet explaining the activities, discussion and actions taken. Christopher Cothran (Executive Committee and Financial Planning Committee) and Alyssa Freeman (Youth and Young Adult Outreach Committee) noted highlights from the minutes included in the board meeting packet of those committee meetings.

- VII. ADJOURNMENT:** Christopher Cothran asked board members if there was any further business of the board. There was none. A motion was made by David Talley and second by George Elmore to adjourn the meeting. The motion was approved unanimously, and the meeting was adjourned at 1:10 p.m. The next Board of Director's meeting will be held on February 8, 2024.



September 17, 2023

Dear Chairman Cothran:

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 Palm Beach County was the only application received during this procurement process. CareerSource Palm Beach County’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 Association to CareerSource Palm Beach County’s Board of Directors, that CareerSource Palm Beach County be selected to serve as One-Stop Operator for PY2023-PY2026 based on the proposal submitted.

This recommendation does not oblige CareerSource Palm Beach County 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 cursive script that reads "Stacy Campbell-Domineck". The signature is written in black ink and is positioned above the printed name.

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

**FINAL MINUTES**  
**PALM BEACH WORKFORCE DEVELOPMENT CONSORTIUM MEETING**  
**February 16, 2023**

**I. CALL TO ORDER AND WELCOME**

Mayor Gregg K. Weiss welcomed attendees and called the meeting to order at 9:00 a.m. A quorum was present with the following members in attendance:

Mayor Greg K. Weiss, Local Chief Elected Official, Palm Beach County  
Mayor Keith James, city of West Palm Beach  
Mayor Joe Kyles, city of South Bay

Board member Mayor Shelly Petrolia, city of Delray Beach and Mayor Chelsea Reed, city of Palm Beach Gardens were absent.

**II. AGENDA APPROVAL**

- a. Proposed Amendments: Mayor Weiss asked if there were any proposed amendments to the agenda as submitted. There were none.
- b. Approval of Agenda: Mayor Weiss requested a motion to adopt the agenda as published. A motion was made by Mayor James and second by Mayor Kyles to approve the agenda. The motion passed unanimously.

**III. PUBLIC COMMENTS:** Mayor Weiss opened the floor for public comment. There were none.

**IV. CHAIR'S COMMENTS:** Mayor Weiss asked the board if there were any questions. There were none.

**V. ITEMS FOR APPROVAL**

- a. Minutes from June 16, 2022: Mayor Weiss asked the board to review the minutes and after reviewing them, advise if they wished to make any corrections. Hearing none, he called for a motion to approve the minutes as submitted.

Motion: Mayor James  
Second: Mayor Kyles  
The motion passed unanimously.

- b. Consortium Ratification of Memorandum of Understanding Infrastructure Funding Agreement Budgets for One-Stop Career Center System Local Workforce Development Area 21 PY 2021-2022 and Approval of PY 2022-2023: Mayor Weiss asked if there was any comments or questions regarding the Memorandum of Understanding or budgets as included in the board agenda packet. Hearing none, he called for a motion to approve.

Motion: Mayor James  
Second: Mayor Kyles  
The motion passed unanimously.

- c. Approval to Select and Designate a Provider of One-Stop Operator Services and Request for Extension to Serve as Direct Provider of Workforce Career Services: An overview of the item was presented as included in the Consortium board agenda packet. Mayor Weiss asked if there was any comments or questions. Hearing none, he called for a motion to approve.

Motion: Mayor James  
Second: Mayor Kyles  
The motion passed unanimously.

- d. Approval of Subsequent Designation of Region 21, Palm Beach County as the Designated Local Workforce Development Area: An overview of the item was presented as included in the Consortium board agenda packet. Mayor Weiss asked if there was any comments or questions. Hearing none, he called for a motion to approve.

Motion: Mayor James

Second: Mayor Kyles

The motion passed unanimously.

#### **VI. INFORMATIONAL:**

- a. President & CEO Updates: There have been several recent major leadership staff changes at both CareerSource Florida and the Florida Department of Economic Opportunity. The Consortium has a new leader with Palm Beach County Mayor Weiss as the new Chair. Palm Beach County's economy is strong. The current unemployment rate continues to be at a record low under 3% for the last 11 consecutive months at 2.2% consistently under the national average. State of the workforce data in the areas of leisure, healthcare and construction was discussed showing the number of jobs added/openings and barriers to employment. 250 current job openings are in Employ Florida with a minimum salary of over \$100,000. Palm Beach County has the highest average salary in the state at \$68,000 annually. The labor market has changed causing employers to find creative ways to bring in new hires. CareerSource has implemented a new online virtual intake and appointment booking feature for job seekers. The status of implementation of two of CareerSource's organizational goals, Operational Excellence and the REACH Act implementation workforce board consolidation, was discussed. Although the state metrics have been challenging, CareerSource put new policies and procedures in place which resulted in our exceeding those metrics and achieving the highest wage rate at \$17.40 for the Welfare Transition Program. Ernst & Young's consolidation recommendations are to be presented at the February 23 CareerSource Florida board of directors meeting. Consortium board members will be advised of the recommendations when released. Following a human centered design service delivery model staff receive training, attend Palm Beach County Days, departmental and audit updates are received and the budgets are approved.

- VII. ADJOURNMENT:** Mayor Weiss asked Consortium members if there was any further business of the Consortium, being none, Mayor Weiss adjourned the meeting at 9:26 a.m. The next meeting will be held on Thursday, June 15, 2023.



**POLICY #  
5060**

<b>Title:</b>	One Stop Operator Conflict of Interest
<b>Programs:</b>	Workforce Innovation and Opportunity Act Title I
<b>Department</b>	Operations
<b>Effective:</b>	

**I. PURPOSE AND SCOPE**

The purpose of this policy is to establish a written conflict of interest one-stop operator policy that complies with Florida State and Federal regulations for CareerSource Palm Beach County.

**II. BACKGROUND**

The Workforce Innovation and Opportunity Act (WIOA) in 2014, requires Local Workforce Development Boards (LWDBs) to select One-Stop Operators. One-Stop Operators, selected by LWDBs assume the unique administrative responsibility within the career center system for coordinating the service delivery of required one-stop partners and service providers. LWDBs can also specify other roles for One-Stop Operators, such as managing the day-to-day operations of their career centers, policy development, or functioning as service providers.

**III. AUTHORITY**

Workforce Innovation and Opportunity Act of 2014, [Public Law 113-128](#), Sections 107(d)(10)(A), 107(g)(2), and 121(d),

20 CFR parts 678.605-625, [Workforce Innovation and Opportunity Act Final Rule](#), August 19, 2016



2 CFR, Part 2900 [Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#), December 19, 2014

Training and Employment Guidance Letter (TEGL) No. 15-16, [Workforce Innovation and Opportunity Act \(WIOA\) Competitive Selection of One-Stop Operators](#), January 17, 2017

[Florida Statutes, 445.007\(6\)](#)

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

##### **A. One-Stop Operator Role**

The One-Stop Operator coordinates the provision of services in all designated CSPBC Career Centers. In addition, the One-Stop Operator facilitates the coordination of all required partners as outlined in 20 CFR 678.400. The primary goal of the One-Stop Operator is to create a seamless system of partners among workforce development, economic development, business, and community agencies in order to meet the needs of employers and job seekers in Palm Beach County.

The One-Stop Operator will assist CSPBC in the development of a workforce system that meets the needs of career seekers and employers in the region. The One-Stop Operator will work closely with CareerSource Palm Beach County staff to effectively implement an integrated system as expressed in the responsibilities outlined below.

##### **1. Services Inventory and Gap Analysis**

One-stop partners, under the direction of the one-stop operator, must create an inventory of services available through required partners, with an emphasis on support services as communicated in CSPBC Policy 5001: Adult and Dislocated Worker Support Services and Needs Related Payments. The inventory should include all services available in the one-stop delivery system. The inventory should include an analysis of gaps in available services that should be addressed through either WIOA or outside funding sources. The inventory shall be made available to staff through the CSPBC intranet.

##### **2. Referral Processes**

One-stop partners, under the direction of the one-stop operator, must develop a written process for referral of individuals served by the one-stop system to services available through all partner programs and other community service providers. The process must include:

- a) a description of services available through each partner program;
- b) eligibility criteria for the services available through each partner program;
- c) a description of the referral mechanism, including a link to or printable copy of any referral or service application forms, and any timeframes associated with the referral process;
- d) identification of a partner referral liaison for each partner program;
- e) a description of the means of providing feedback to referring partners for each referral made;
- f) to the extent available, similar information about referrals to other community service providers; and
- g) a timeline for updating the process with the goals of improved customer service and increased access to services.

### **3. Cross-Training**

One-stop partners, under the direction of the one-stop operator, must develop a plan to cross-train all front-line one-stop partner staff in the referral process to all required partners. Refresher training for existing staff and training for newly hired staff should be included in the training plan. The One-Stop Operator should evaluate the effectiveness of the cross-training program annually and make recommendations for continuous improvement.

### **4. Policy Development**

The One-Stop Operator should review and develop policies related to areas in the organization associated with Human Resources, Communications, and Finance. The One-Stop Operator should ensure appropriate staff are training on policies and make recommendations for continuous improvement.

## **B. One Stop Operator Prohibited Duties**

In accordance with Federal Guidance and Administrative Policy 097: WIOA One-Stop Operator Procurement, the Operator must not:

- a) Convene system stakeholders to assist in the development of the local plan.
- b) Prepare and submit the CSPBC local plan (as required under WIOA sec. 107).
- c) Be responsible for oversight of itself.
- d) Manage or significantly participate in the competitive selection process for one stop operators.
- e) Select or terminate one stop operators, career service providers, and youth providers.
- f) Negotiate local performance accountability measures.
- g) Develop and submit budgets for activities of CSPBC in the local area.

**C. Avoiding Conflicts of Interest**

The one-stop operator must disclose potential conflicts of interest arising from the relationships of the operators with particular training service providers or other service providers.

The One-Stop Operator cannot establish 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 service. The One-Stop Operator must comply with federal regulations and procurement policies governing calculation and use of profits.

**D. Monitoring**

In accordance with WIOA, the One-Stop Operator must be monitored. Since CSPBC is the One-Stop Operator, an outside organization or entity will conduct the monitoring and report the results to the CEO.

**V. DEFINITIONS**

None

**VI. REVISION HISTORY**

<b>Date</b>	<b>Description</b>
TBD	Approved by CareerSource Palm Beach County President/CEO
TBD	Issued to CareerSource Palm Beach County staff

**VII. RESOURCES**

None

**INTERLOCAL AGREEMENT  
PALM BEACH WORKFORCE DEVELOPMENT CONSORTIUM**

**R2021-1457**

**THIS INTERLOCAL AGREEMENT**, is entered into this \_\_\_ day of OCT 05 2021 2021, by and between Palm Beach County (County) a political subdivision of the State of Florida and the City of Delray Beach, the City of Palm Beach Gardens, the City of South Bay and the City of West Palm Beach. The Parties acknowledge that the prior Interlocal Agreement R2007-1220 creating the Palm Beach Workforce Development Consortium (Consortium), dated July 10, 2007 and its amendments thereto; the First Amendment to the Interlocal Agreement R2007-1446 clarifying the responsibilities of the Consortium and creating the Palm Beach Workforce Development Consortium Independent Special District (ISD) for the purpose of offering Consortium staff the ability to participate in the Florida Retirement System, dated September 11, 2007; Amendment No. 2 to the Interlocal Agreement R2008-1268 authorizing the designation of a Regional Workforce Board as a one stop operator and direct provider of certain services, dated July 22, 2008 and the Third Amendment to the Interlocal Agreement R2014-1650 establishing Palm Beach County as the Chief Elected Official and adding the City of West Palm Beach as a Consortium member, dated November 18, 2014, are hereby by mutual agreement of the parties replaced in their entirety by this Interlocal Agreement.

**WITNESSETH:**

**WHEREAS**, the parties to this Agreement formed the Consortium for the purpose of establishing an ISD and to implement Federal and State workforce development programs and related activities in Palm Beach County, Florida under the provisions of the Workforce Innovation and Opportunity Act, the Temporary Assistance to Needy Families Act, the Wagner-Peyser Act and the Florida Workforce Innovation Act of 2000 ("Workforce Programs"); and

**WHEREAS**, Public Law 113-128 enacted by the congress of the United States effective July 1, 2015, which Act is known as the Workforce Innovation and Opportunity Act ("WIOA"), established a program to provide universal access to workforce development services for the businesses and citizens of Palm Beach County; and

**WHEREAS**, the State of Florida's Workforce Development Board CareerSource Florida, Inc. created by the Legislature in 2000, has been designated by the Governor to take the lead in designing and directing Florida's workforce development strategy and to designate Local Workforce Development Areas; and

**WHEREAS**, Palm Beach County, Florida has been designated by the Governor of the State of Florida as Local Workforce Development Area 21 ("LWDA 21") and the Palm Beach County Board of County Commissioners is designated as the Local Chief Elected Official, the fiscal agent, grant recipient and administrative entity to administer Workforce Programs and such other funding sources as may be available to support workforce development activities for LWDA 21; and

**WHEREAS**, the governing body of each of the parties to this Agreement desire that its county or city be included in regional workforce development initiatives to avail its businesses and citizens of the benefits of Florida's workforce development strategy, including those programs funded through the Workforce Programs and such other funding sources as may be available to support workforce activities; and

**WHEREAS**, the above governing bodies in the LWDA 21 have come together to form the Consortium to carry out their separate and independent functions described herein in a coordinated and cooperative fashion.

**NOW, THEREFORE**, in consideration of the promises and mutual covenants and obligations contained herein and for other good and valuable consideration, the parties agree and understand as follows:

1. CONTINUATION OF THE CONSORTIUM

- a. The parties to this Interlocal Agreement hereby reaffirm, restate and establish their intent to continue the operation of the multi-jurisdictional consortium, called the Consortium for the express purpose of collectively carrying out the individual responsibilities of each party to this Agreement under the Workforce Programs, other applicable statutes and such other funding sources as may be available to support workforce activities.
- b. The members, representatives and officers of the Consortium are specified in Sections 8.a. and 8.b. of this Interlocal Agreement.

2. PARTIES TO THIS AGREEMENT

Each of the parties to this Agreement is a county or city of the State of Florida, within Palm Beach County and as such is a general-purpose political subdivision, which has the power to levy taxes and expend funds, as well as general corporate and police powers. These parties are more particularly identified as follows:

Name	Address
Board of County Commissioners Palm Beach County, Florida	301 North Olive Avenue West Palm Beach, FL 33401
City of Delray Beach Delray Beach, Florida	100 NW First Avenue Delray Beach, FL 33444
City of Palm Beach Gardens Palm Beach Gardens, Florida	10500 North Military Trail Palm Beach Gardens, FL 33410
City of South Bay South Bay, Florida	335 SW 2nd Ave South Bay, FL 33493

City of West Palm Beach  
West Palm Beach, Florida

401 Clematis Street  
West Palm Beach, FL 33401

3. CONSIDERATION

In order to establish the background, context, and frame of reference for this Agreement and to generally express the objectives and intentions of the respective parties hereto, the following are the predicates underlying the undertakings and commitments included within the provisions which follow and shall be constructed as the essential elements of the mutual considerations upon which this Agreement is based.

4. GEOGRAPHICAL AREA TO BE SERVED BY THIS AGREEMENT

- a. The geographical area to be served by this Agreement is Palm Beach County, Florida.
- b. Pursuant to the designation by the Governor, Palm Beach County shall be the LWDA 21 as provided for in Section 106 of Title 1 of WIOA and Florida's workforce development initiatives as designated by CareerSource Florida, Inc. and the Governor of Florida.

5. FEDERAL AND STATE REQUIREMENTS

It is the intent of the Consortium to incorporate into this Agreement the duties and obligations governing Workforce Programs, as well as any other rules and regulations both state and federal, applicable to these initiatives.

6. CREATION OF ADMINISTRATIVE ENTITY AND DIRECT PROVIDER OF SERVICES

The Consortium will employ staff, which on the effective date of this agreement comprises CareerSource, as the administrative entity and the Director Provider of Services to operate and implement Workforce Programs and related programs in LWDA 21.

7. JOINT UNDERSTANDING

The terms and conditions, which follow, reflect the joint understanding between the parties.

8. MEMBERSHIP

- a. The Consortium shall consist of representatives of the five (5) member governments who shall be elected officials designated to serve by their respective Commission, or Council with the exception of the City of West

Palm Beach from which the representative shall be the Mayor. Each municipality shall have one (1) representative, entitled to one vote each. The County shall have one (1) representative entitled to a total of five (5) votes. The elected officials or, in the case of the City of West Palm Beach, the Mayor may designate an alternate to serve in the elected official's or Mayor's absence. The alternate shall be an elected official to the Commission or Council.

- b. The officers of the Consortium shall include a chair which is the representative of the Board of County Commissioners of Palm Beach County. The vice chair shall be elected from among the mayors or elected officials of the four (4) participating cities by the membership of the Consortium for a term of one (1) year, consistent with the state fiscal year, but shall hold office until a successor is duly elected.

## 9. DUTIES AND RESPONSIBILITIES OF THE CONSORTIUM

- a. To appoint the members of the CareerSource board which shall consist of no less than 19 and no more than 33 members as provided for under WIOA and the Florida Workforce Innovation Act.
  - i. Each municipality that is a Consortium member may appoint one (1) private sector member of the Board, meeting the requirements of WIOA, section 107.(b)(2)(A) and the Florida Workforce Innovation Act. The County will appoint additional private sector board appointments to assure a minimum 51% private sector majority, meeting the requirements of WIOA and the Florida Workforce Innovation Act. Mandatory appointments will be approved by the Consortium.
  - ii. The Consortium may add individual organizational representatives to the membership of the CareerSource Board of Directors as provided for under WIOA and the Florida Workforce Innovation Act, provided that sufficient additional private sector appointments are made to assure a minimum 51% private sector majority.
- b. The Board of County Commissioners of Palm Beach County is designated the fiscal agent, grant recipient and administrative entity to administer Workforce Programs and such other funding sources as may be available to support workforce development activities for LWDA 21. The Board of County Commissioners of Palm Beach County shall designate the subgrant recipient, which on the effective date of this agreement is CareerSource, whose responsibility is to administer Workforce Programs. The Board of County Commissioners of Palm Beach County and the subgrant recipient shall enter into a formal agreement.

- c. To determine the procedures for the development of the Local Plan as described in Section 108 of WIOA and the strategy to implement Florida's workforce development initiatives within LWDA 21.
- d. Together with the subgrant recipient to approve the Local Plan for LWDA 21 and modifications thereto.
- e. To provide oversight and guidance in conjunction with the subgrant recipient.
- f. To accept responsibility for compliance and accountability for state and federal funds. Any disallowed costs will remain the responsibility of Palm Beach County as the Local Chief Elected Official.
- g. To establish an ISD (to create through an interlocal agreement offering staff the ability to participate in the Florida Retirement System), with no taxing or bonding authority, to enhance workforce development activities in Palm Beach County, Florida.
- h. To perform any other appropriate duties necessary for the accomplishment, and consistent with the purposes of this Agreement and the Workforce Programs.
- i. The following provisions for the requirements of the ISD Charter are provided:
  - i. The purpose of the ISD is to develop a readily available workforce of skilled workers which is mandatory to attract new businesses to the ISD and to retain and expand existing businesses within the ISD. This in turn will increase the wealth of the ISD, grow the economic "pie", ensure jobs for our citizens, expand the tax base, improve the quality of life and ensure the district's economic future.
  - ii. The powers, functions and duties of the ISD will not be used for the purpose of ad valorem taxation, bond issuance or other revenue-raising capabilities within the district.
  - iii. The method of establishing the ISD was by the First Amendment to the Interlocal Agreement executed on September 11, 2007 between the governing bodies of Palm Beach County and the municipalities of Delray Beach, Palm Beach Gardens and South Bay, all located within the boundaries of Palm Beach County, Florida. The ISD shall be reaffirmed by the concurrence and signing of all participants of this Interlocal Agreement.
  - iv. The ISD Charter will be amended as required upon recommendation by any member of the Consortium/ISD providing thirty days written notice prior to a scheduled meeting of the members.



- v. The membership and organization of the ISD will parallel that of the Consortium.
- vi. There will be no compensation for members of the ISD governing board other than for travel and meeting expenses.
- vii. The administrative duties of the ISD governing board are as follows:
  - Determine the procedures for the development of the Local Plan and the strategy to implement Florida's workforce development initiative within the ISD.
  - Together with CareerSource, to approve the Local Plan for the ISD and modifications thereto.
  - Provide oversight and guidance in conjunction with the CareerSource Board of Directors.
  - Perform any other appropriate duties necessary for the accomplishment, and consistent with the purposes of the ISD.
- viii. The applicable financial disclosure, noticing, and reporting requirements will be followed as required by and in accordance with all applicable Florida Statutes for publicly elected officials, in accordance with Florida's Government-in-the Sunshine Law (Florida Statutes Chapter 286) and reporting will be in parallel with the Consortium and CareerSource as required for federal and state reporting.
- ix. Members of the ISD governing board will be a duly elected County Mayor and a city Councilperson from each of the member municipalities appointed to the ISD by their respective commission or council.
- x. The ISD will be financed through the allocation of federal funds from the United States Department of Labor or the United States Department of Health and Human Services or through any other federal, state or local source. Other funds in the form of public and/or private grants or awards may be available from time to time.
- xi. The ISD will not tax, issue bonds, nor collect non ad valorem assessments, fees or service charges.
- xii. Planning to meet federal and state requirements is the submission of a Local Plan every four years which is process oriented in nature. The Local Plan will be tailored to the ISD and will focus on the outcomes necessary to meet the goals and objectives of the ISD and reviewed on an annual basis.

- xiii. The geographic boundary of the ISD is limited to the confines of the legal description of Palm Beach County, Florida.
- xiv. The creation of this ISD is consistent with local government approved comprehensive plans.

## 10. MEETINGS

- a. The Consortium Chair shall preside at all Consortium meetings and shall perform all duties incident to that office. The Consortium Vice Chair shall preside in the absence of the Chair and shall have the power to exercise and perform all duties of the Chair.
- b. Meetings shall be held at least twice annually.
- c. Meetings shall be noticed and declared public meetings, open to the public, in accordance with the Sunshine Law, Section 286.011, Florida Statutes.
- d. A quorum at any Consortium meeting shall consist of the representative of the Board of County Commissioners of Palm Beach County and two (2) additional members or their designated alternates. A quorum is required to transact Consortium business.
- e. At all meetings of the Consortium at which a quorum is present, all matters shall be decided by the majority vote of said members.

## 11. FINANCIAL SUPPORT

- a. The Consortium shall support its programs and any costs incidental to the operation of its programs by grant funds appropriated to it by the United States Department of Labor or the United States Department of Health and Human Services for Workforce Programs or other workforce development or related grants provided by CareerSource Florida, Inc. or through any other federal, state or local source. In addition, the Consortium is authorized to accept any other grants in aid or assistance funds, from the United States Government or to accept appropriations from any of its members, or any other organization or person, including the acceptance of gifts, grants, or requests whether it be in the form of tangible or intangible property.
- b. No funds will be required from the treasuries of any of the parties to this Agreement for implementation of workforce development initiatives, including Workforce Programs or others, it being the intent hereof that all funding of the workforce development initiatives and the Consortium shall be accomplished by grants and funds available pursuant to workforce development initiative programs, including any other State and Federal grants or other funding which will further the purpose of the program. The above language does not

preclude units of local government from expending funds under their jurisdiction on workforce development programs.

- c. The Consortium is a governmental entity as defined in Chapter 768.28 Florida Statutes, and agrees to be fully responsible for acts and omissions of its agents or employees to the extent permitted by law. Nothing herein is intended to serve as a waiver of sovereign immunity by the Consortium for which sovereign immunity is applicable. Nothing herein shall be construed as consent by a member of the Consortium as a political subdivision of the state of Florida to be sued by third parties in any matter arising out of this or any other contract, this agreement or any part thereof. The Consortium shall assume equal liability to the extent allowed and/or required by law for the operation of Federal and State workforce development programs.
- d. The Consortium shall purchase Insurance to indemnify itself and/or any of its members and any separate legal entity or contractors from any liability, which may attach due to its operation of the Workforce Programs or other Federal or State workforce development programs.

## 12. POWERS DELEGATED TO THE CONSORTIUM

The Consortium shall make all policy decisions except those which must be made in partnership with CareerSource pursuant to the authorizing legislation under which grants are made available. Policy decisions shall include, but not be limited to, those powers enumerated at Section 163.01(5), (6), and (7) of the Florida State Statutes, such as, but not limited to:

- a. The approval of the CareerSource President and CEO, upon the recommendation of the CareerSource Board of Directors. In accordance with Section 445.007(2)(c) Florida Statutes and CareerSource Florida Administrative Policy Number 110, Section IV.A.1. The Local Chief Elected Official may remove a member of the Board of Directors, the CareerSource President and CEO, or the designated person responsible for the operational and administrative function of CareerSource for cause. Cause includes, but is not limited to, engaging in fraud or other criminal acts, incapacity, unfitness, neglect of duty, official incompetence and irresponsibility, misfeasance, malfeasance, nonfeasance, gross mismanagement, waste or lack of performance.
- b. The power to appoint a separate legal administrative entity to carry out Consortium policies and perform as described in Chapter 163 of the Florida State Statutes, Sections 163.01(7) (b). The designation on the effective date of this agreement is CareerSource.
- c. The manner in which accountability for fund expenditures shall be provided for including an independent audit to be conducted in accordance with the

Florida Statutes and Government Auditing Standards.

- d. The acceptance of grants, gifts, or other types of financial assistance as allowed by law.
- e. Authorization of the President and CEO of CareerSource to negotiate, enter into and execute agreements following the approval of CareerSource Board policy as appropriate to carry out the operational and administrative requirements and functions of the Workforce Programs, Local Plan and for day to day operations.
- f. Authorization of the President and CEO of CareerSource, to make purchases in accordance with the procurement and purchasing guidelines approved as a part of the CareerSource Local Plan filed with the state. Purchases shall include services, supplies, consultant agreements, materials, equipment and leased space.
- g. Authorization of the President and CEO of CareerSource, to make and issue policies and procedures as determined by the CEO limitations of the Carver Board Policy Governing model.
- h. Authorization of the President and CEO of CareerSource to make emergency decisions which may include the acceptance or application for grants or the entry into contracts or the expenditure of funds in emergency situations where a meeting of the Consortium and or the CareerSource board as appropriate cannot be called prior to the time that an action must be executed. Such actions shall be placed on the agenda of the next meeting of the Consortium and CareerSource board for ratification by the appropriate entity. All such contracts, purchases and expenditures shall be in accordance with established rules and governing state and federal policies and circulars.
- i. The manner in which funds shall be disbursed or paid by the administrative entity charged with operating the programs of providing services contemplated by this Agreement which on the effective date of this agreement is CareerSource.
- j. The acquisition, ownership, custody, operation, maintenance, lease or sale of real or personal property subject to federal and state rules.
- k. The disposition, diversion or distribution of any property acquired.
- l. The composition, membership appointments, and organizational approval of any advisory bodies to the Consortium.
- m. The manner in which staff shall be employed to carry out and serve Consortium and CareerSource objectives.

- n. The development of procedures and/or administrative rules to effectively carry out the Consortium's policies and decisions so long as they do not conflict with governing federal and state rules and regulations and policies, rules and regulations of the CareerSource Florida Inc. and the Florida Department of Economic Opportunity.
- o. Any other necessary and proper matters as they may arise and as agreed upon by the Consortium members and member governments.

### 13. SIGNATORY

The Chair shall act as signatory for the Consortium. In the absence of the Chair, any of the other members may sign for the Consortium in the Chair's stead.

### 14. ALL PRIOR AGREEMENTS

It is understood and agreed that this document incorporates and includes all prior negotiations, correspondence, conversations, agreements, or understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements, or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior representation or agreements whether oral or written.

### 15. AMENDMENT

It is agreed that no modification, amendment, or alteration of the terms or conditions contained in this Agreement shall be effective unless contained in a written document executed with the same formality and of equal dignity herewith.

### 16. TERM; TERMINATION

This Agreement shall be automatically renewed annually without action of any party. Should any party to this Agreement wish to terminate its participation, a 60-day written notice shall be provided to all parties hereunder and to the President/CEO of CareerSource, 3400 Belvedere Road, West Palm Beach, Florida 33406. Notice must be given in writing sent by Certified United States Mail with Return Receipt Requested.

FOR:

Board of County Commissioners  
Palm Beach County, Florida

301 North Olive Avenue  
West Palm Beach, FL 33401

Mayor, City of Delray Beach  
Delray Beach, Florida

100 NW First Avenue  
Delray Beach, FL 33444

Mayor, City of Palm Beach Gardens  
Palm Beach Gardens, Florida

10500 North Military Trail  
Palm Beach Garden 33410

Mayor, City of South Bay  
South Bay, Florida

335 SW 2nd Ave  
South Bay, FL 33493

Mayor, City of West Palm Beach  
West Palm Beach, Florida

401 Clematis Street  
West Palm Beach, FL 33401

18. CONSTRUCTION AND REMEDIES

This Agreement shall be deemed to be a binding contract and shall be construed in accordance with and governed by the laws of the State of Florida. Any legal action necessary to enforce the Contract will be held in a court of competent jurisdiction located in Palm Beach County, Florida.

No provision of this Agreement is intended to, or shall be construed to, create any third party beneficiary or to provide any rights to any person or entity not a party to this Agreement, including but not limited to any citizen or employees of the Consortium, County, or municipalities.

19. INVALID PROVISION/SEVERABILITY

In the event that any provision of this Agreement or the application of any such provision to any party or circumstances be held invalid or unenforceable or the application of such provision to parties or circumstances be unenforceable, the remainder of this Agreement shall not be affected thereby and shall remain in full force and effect.

20. WAIVER OF RIGHTS

Any waiver at any time by any party hereto of its rights with respect to any matter arising in connection with this Agreement shall not be considered a waiver with respect to any subsequent default or matter.

REMAINDER OF PAGE INTENTIONALLY BLANK

**EXECUTION PAGE [Page 1 of 5]**

**IN WITNESS WHEREOF**, the parties hereto have made and executed this Agreement on the respective dates under each signature below.

**CITY OF DELRAY BEACH**

BY:  Mayor

DATE: 8/10/2021

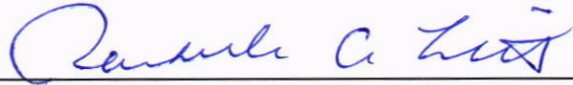
ATTEST: 



**EXECUTION PAGE [Page 2 of 5]**

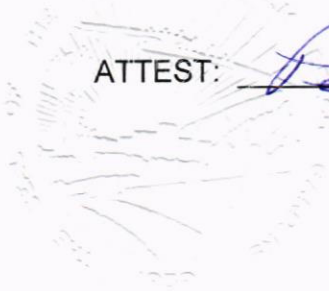
**IN WITNESS WHEREOF**, the parties hereto have made and executed this Agreement on the respective dates under each signature below.

**CITY OF PALM BEACH GARDENS**

BY:  Mayor

DATE: July 15, 2021

ATTEST:   
Patricia Sinder, CMC, city clerk





**EXECUTION PAGE [Page 3 of 5]**

**IN WITNESS WHEREOF**, the parties hereto have made and executed this Agreement on the respective dates under each signature below.

**CITY OF SOUTH BAY**

BY: Joe Kyle Mayor

DATE: June 01, 2021

ATTEST: [Signature]



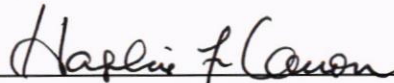
**EXECUTION PAGE [Page 4 of 5]**


**IN WITNESS WHEREOF**, the parties hereto have made and executed this Agreement on the respective dates under each signature below.

**CITY OF WEST PALM BEACH**

BY:  Mayor

DATE: 7/27/21

ATTEST: 

CITY ATTORNEY'S OFFICE  
Approved as to form and legality  
By: 

EXECUTION PAGE [Page 5 of 5]

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature below.

ATTEST:  
JOSEPH ABRUZZO  
CLERK AND COMPTROLLER


BY:   
Deputy Clerk



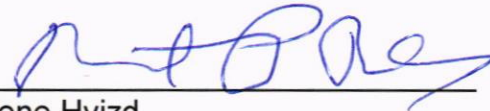
R2021-1457

OCT 05 2021


PALM BEACH COUNTY BOARD OF  
COUNTY COMMISSIONERS

BY:   
Dave Kerner, Mayor

APPROVED AS TO FORM  
AND LEGAL SUFFICIENCY

BY:   
Helene Hvizd,  
Assistant County Attorney

APPROVED AS TO TERMS  
AND CONDITIONS

BY:   
Dorritt M. Miller,  
Assistant County Administrator

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

## **Consent Item 8**

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

The Workforce Innovation and Opportunity Act (WIOA) allows local workforce development boards (LWDBs) to serve as direct providers of basic and individualized career services (also referred to as “workforce services”), with the agreement of the chief elected official in the local area, LWDB, and the Governor. Section 445.007(6), Florida Statutes, allows for LWDBs 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 LWDB 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 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 LWDB.

CareerSource Escarosa requests approval for designation as a direct provider of workforce services and 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 recommends approval of the LWDB’s request for designation as direct provider of workforce services.

### **FOR CONSIDERATION**

- **Authorize CareerSource Escarosa’s request to be designated as a Direct Provider of Workforce Services beginning July 1, 2023, through June 30, 2026.**

## **EXTENSION REQUEST TO SERVE AS DIRECT PROVIDER OF WORKFORCE SERVICES**

CareerSource Escarosa d/b/a Workforce Escarosa and herein referred to as CareerSource Escarosa, with the approval of the CareerSource Escarosa Board of Directors submits the following extension request to the Santa Rosa County Board of County Commissioners for approval. Further approval will be requested from CareerSource Florida (CSF). This request for extension follows the process outlined by CSF's Administrative Policy Number 083, effective December 21, 2017 describing the process for Direct Provider of Workforce Services. The policy requires:

### **1. A description of the revised business model.**

CareerSource Escarosa has established a business model that provides a market-driven approach to talent development that prepares individuals seeking employment for the jobs of today and of the future. It provides increased flexibility allowing for a swift response to local demands, economic shifts and strategic priorities. This structure has enhanced the capacity of the regional one-stop system and has proven to provide streamlined delivery of services through the elimination of duplicate management layers and resultant costs.

The Organizational Structure (attached) of the management staff shows that the Executive Director is the sole person responsible and accountable to the Board of Directors for the delivery of services. The Director reports to the Local Workforce Development Board who has delegated authority to the Board Chair and the Executive Committee to act on their behalf.

The Operations Organizational Structure shows the Executive Director has delegated authority for day-to-day operations management to the Chief Operating Officer who functions as the Chief of Operations. The Chief Operating Officer has authority and responsibility for all programs and services provided through the One-Stop Centers and provides direct supervision to the One-Stop Center staff. Support services for the Operations and Management of the One Stop Centers will be provided by Program Managers, the Chief Financial Officer, and the IT Manager.

CareerSource Escarosa has consistently acted to maximize the ability of the Local Workforce Development Board to respond effectively and efficiently to the demands of our customers, both employers and job seekers, within the workforce system in our two-county region. This customer-focused approach has resulted in state-leading performance and excellent customer service.

### **2. The effective date for when the extension will begin is July 1<sup>st</sup>, 2023.**

### **3. The period of time, not to exceed three years for when the extension will be in effect.**

This extension as a Direct Provider of Workforce Services is requested to be effective July 1, 2023 and continue through June 30, 2026.

### **4. A Review of the LWDB's stated reasons in its previous request why the LWDB has decided to directly provide workforce services, and an explanation of how it is still in the best interest of the LWDB's customers that the LWDB continue to provide these services.**

Due to continued budgetary decline and associated reduction in staffing levels, a streamlined process for delivering services became necessary. Obtaining the extended designation to be a direct provider of workforce services will allow us to continue operating with these efficiencies. With the extension as a Direct Provider of Workforce Services, CareerSource Escarosa will continue to work with our many partners in the region to better meet any new and/or changing needs of our business community and job seekers. It will also allow us to leverage resources of a regional consortium of Northwest Florida

workforce boards and economic development partners, including FloridaWest, Santa Rosa Economic Development Office, Florida's Great Northwest, and our education partners in Escambia and Santa Rosa Counties.

The streamlined flexible process for delivering services that now exists has not only led to excellent performance, it has also resulted in cost savings and the ability to focus more resources on delivery of services. It is in the best interest of CareerSource Escarosa's customers that this LWDB continue to provide these services directly. In the past, CareerSource Escarosa operated through a third party provider which resulted in over \$100,000.00 in additional costs annually.

**5. A review of the effectiveness of the "firewall" established by the LWDB to clearly separate existing roles as oversight body for the LWDB's workforce delivery system and its role as the direct provider of workforce services, and an explanation of changes to be made to the firewall.**

In its deliberations on whether to request designation as a Direct Provider of Workforce Services, key points were made to remind all members that the Board's primary mission is one of design, oversight, and policy making and not management of day to day operations. Board members and committees are keenly aware of the distinction in the roles of Board Oversight and the role of staff to manage the operations. The Chief Executive Officer has been clearly designated as the sole person accountable to the Board. All other Board staff report to and take direction from the Chief Executive Officer.

The organizational structure includes The Chief Operating Officer who, reports to the Chief Executive Officer, and has responsibility for all programs and services provided by the one-stop centers. Program Managers provide programmatic support, and direct staff supervision to the programs in their areas of specialization. The Managers also provide internal program monitoring to evaluate program performance and provide training and technical support in their programs of expertise such as Veterans Services, Universal Services (Wagner Peyser), WIOA Adult and WIOA Youth, Welfare Transition, SNAP, One-Stop Compliance and Military Family Employment Assistance Programs.

The members of the CareerSource Escarosa Board are responsible for the establishment of goals, high-level policy and to direct board staff to develop strategies to achieve those goals and implement policy. Board staff will provide management and operation support of programs. See diagram:

The establishment of this structure and policies by the CareerSource Escarosa Board provides a solid "firewall" between the Board of Directors of CareerSource Escarosa oversight and the conduct of operations/service delivery in this region.

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

CareerSource Escarosa will continue to charge all expenses incurred in accordance with our approved cost allocation plan. Therefore, the costs associated with directly providing the services as proposed shall be allocated or directly charged to all grants

The designation of Direct Provider of Workforce Services will not change the description of grant programs and/or services currently contained in the approved plan and subsequent modifications. All such portions of the plan will remain in effect.

**Current Grant Programs:**

WIOA Adult  
WIOA Dislocated Worker  
WIOA Youth  
SNAP  
Wagner-Peyser  
UC  
Veterans – DVOP  
Veterans – LVER  
Welfare Transition  
Military Family Advocacy  
Integrated Services Pilot Project (WIOA funds)  
Get There Faster  
Rapid Response  
Apprenticeship

**7. A cost analysis that documents the actual reduction in costs with the LWDB providing workforce services rather than contracting those services to another provider and an estimate of such costs and savings for the upcoming three-year period.**

CareerSource Escarosa conducted a cost analysis and estimated that the cost savings of operating as a Direct Provider of Workforce Services would result in a savings of over \$100,000.00 annually. This analysis resulted in the organization's separation from a previous contractual agreement with a third party provider of services.

**8. A review of any other realized improvement to service delivery and performance outcomes and description of anticipated improvements.**

CareerSource Escarosa consistently meets and exceeds most targets set for performance. Our latest report on performance goals shows we exceed 71% and meet 7% of our goals. For the few goals we are not meeting, we are continuously working to improve on them. Designation as a Direct Provider of Workforce Services will ensure that we continue to operate in an efficient and effective manner.

**9. Documentation that the public was provided at least 10 days' notice to review and comment on the proposed extension. Any submitted comments must be included.**

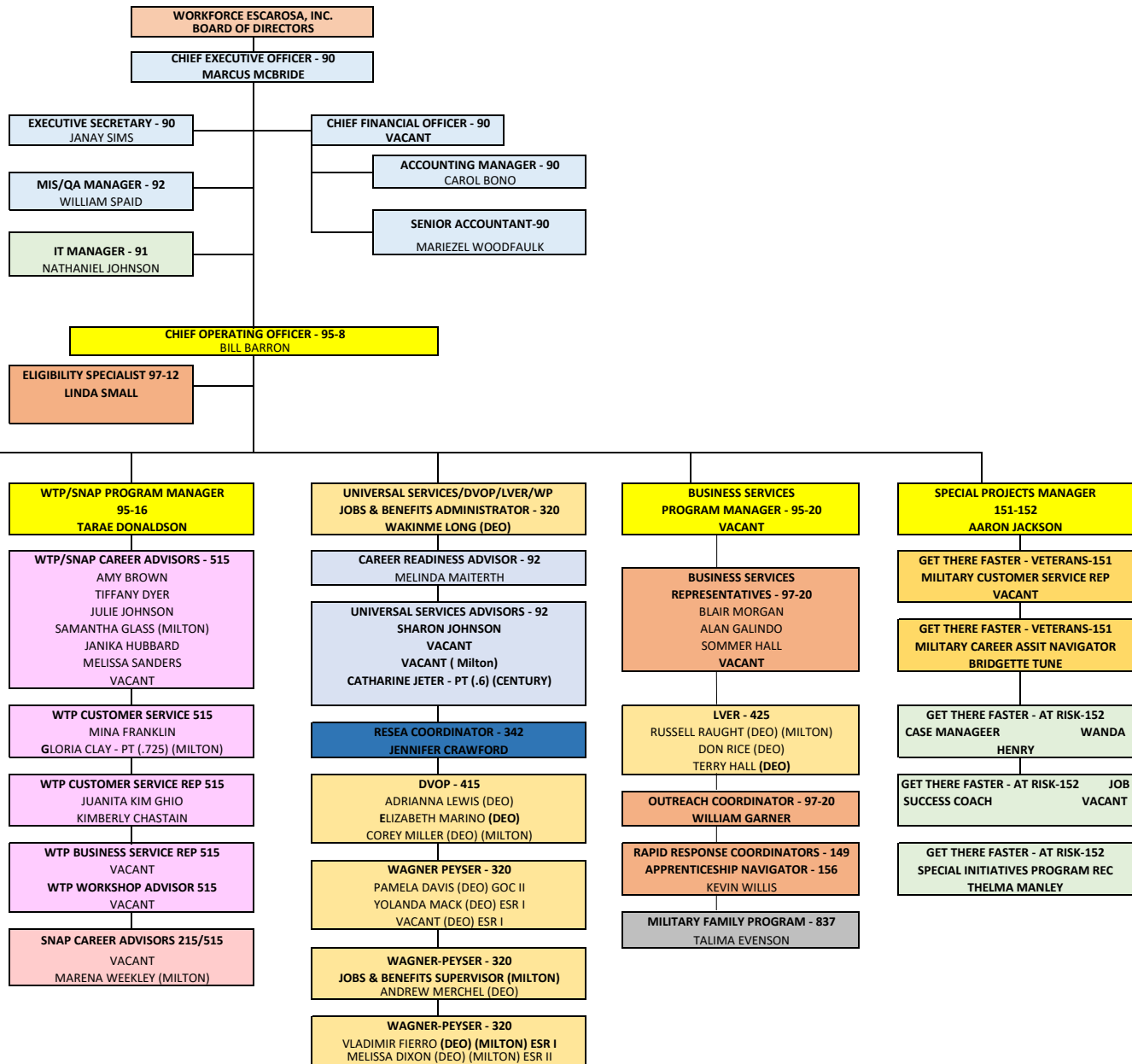
This designation will result in no changes to CareerSource Escarosa's current service delivery method. Further, there are no changes to our Workforce Plan Two-Year Modification which received public comment and was approved by the Santa Rosa County Board of County Commissioners and Escambia Board of County Commissioners on September 2, 2022 and October 6, 2022, respectively.

**10. Documentation that the Chief Elected Official has agreed to the planned extension.**

Signature sheets will be executed by the CSE Board of Directors May 2023. Review and approval by designated Chief Local Elected Official for Santa Rosa and Escambia Counties are scheduled for May 2023.

**11. Completed Request for Extension to Serve as a Direct Provider of Workforce Services**

See attached Request for Extension to Serve as a Direct Provider of Workforce Services.



LS & PROGRAMS	
90 - INDIRECT	
91 - COMPUTER NETWORK	
92 - ONE STOP	
95 - PROGRAM MANAGEMENT	
97 - WIOA DIRECT SERVICES	
136 - YOUTH CONTRACTS	
137 - INTERGRATED SERVICES	
151 - GET THERE FASTER - VETERANS	
152 - GET THERE FASTER - AT RISK	
168 - HURRICANE SALLY	
215 - SNAP	
515 - WELFARE TRANSITION	
837 - MILITARY FAMILY	
320 - DEO STAFF	


STAFF	37
VACANT	10
DEO	11
VACANT	1
	48

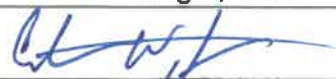


**REQUEST FOR EXTENSION**

<b>LOCAL WORKFORCE AREA INFORMATION</b>	
Name of Local Area: <b>Workforce Escarosa, Inc. dba CareerSource Escarosa</b>	
LWDB Number: <b>01</b>	
Date of Submission:	
Contact Person Name: <b>Marcus L. McBride, PhD</b>	Phone: <b>850-473-0939</b>
	Email Address: <b>mmcbride@careersourceescarosa.com</b>

<b>AMENDMENT TO THE LOCAL WORKFORCE SERVICES PLAN</b>
<p>The Local Workforce Development Board seeks to extend its designation as a direct service provider of certain services by agreement of the Chief Elected Official and the Governor. This extension to the designation of the Local Workforce Development Board as a direct service provider of certain services is to be effective for the period <u>July 1, 2023</u> through <u>June 30, 2026</u>.</p> <p>The signatures below certify agreement to the request for extension submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this extension, its Workforce Service Plan, and applicable federal and state laws and regulations.</p>

<b>LOCAL WORKFORCE DEVELOPMENT BOARD CHAIRMAN</b>	
Name: <b>Kathaleen Cole</b>	Title: <b>Board Chair - CareerSource Escarosa</b>
Signature: 	Date: <b>May 18, 2023</b>

<b>LOCAL CHIEF ELECTED OFFICIAL</b>	
Name and Title: <b>Colten Wright, Chair</b>	County: <b>Official Chief Local Elected Official (CLEO) Designated for Escambia and Santa Rosa Counties</b>
Signature: 	Date: <b>May 11th 2023</b>

ATTEST:   
 Donald C. Spencer, Clerk of Court

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

# Action Item 1

## CAREERSOURCE FLORIDA REGISTERED APPRENTICESHIP STRATEGIC POLICY

The Workforce Innovation and Opportunity Act (WIOA) and the National Apprenticeship Act clearly establish registered apprenticeships as an evidence-based model for job seekers, providing them with in-demand job opportunities, defined career pathways, quantifiable skills, and a nationally recognized credential. Title I of WIOA affirms a commitment to provide eligible participants with high-quality career and training services that lead to employment or postsecondary education, including training in targeted, in-demand industries and occupations. In February 2019, the CareerSource Florida Board of Directors approved CareerSource Florida Strategic Policy 2019.02.13.A.1 – Apprenticeship Policy defining the Florida Workforce Development Board's strategic vision for effective sector Registered Apprenticeship Programs including on-the-job learning, related instruction, supportive services, and apprenticeship expansion activities. That policy was updated in December 2021 to reflect changes in workforce related programs and services and to comply with the Reimagining Education and Career Help Act (REACH).

Florida Governor's Executive Order Number 19-31 charts a course for Florida to become number one in the nation in workforce education by 2030, ensuring Florida students are prepared for the jobs of the future. The CareerSource Florida Board of Directors and its partners support Registered Apprenticeships as a powerful tool for workforce education, combining on-the-job learning with related technical instruction to create a highly skilled workforce.

Statewide Registered Apprenticeship Program (RAP) expansion positions the Florida workforce development system to foster a robust and inclusive work-based training ecosystem focused on collaboration between business, workforce, and education. Apprenticeship strategies increase access to in-demand jobs and career pathways that drive economic growth and sustain the workforce demands of the future. Registered Apprenticeships help businesses reach a broader and more diverse pool of workers while creating new career pathways for Florida workers, and provide job seekers with a structured paid learning experience that results in a portable, nationally recognized, industry credential.

A network-wide Registered Apprenticeship strategy implemented by all local workforce development boards positions Florida to develop talent pipelines for Florida employers and establishes the state as a national leader in RAPs. This strategy fosters strong partnerships between local workforce development boards, economic developers, employers, educational institutions, and other key stakeholders.

This updated Registered Apprenticeship strategic policy replaces CareerSource Florida Strategic Policy 2019.02.13.A.1 and establishes that CareerSource Florida, in partnership with the Florida Department of Commerce and the Florida Department of Education, will include specific goals for apprenticeship expansion in the Workforce Innovation and Opportunity Act State Plan. Goals are to include, but not be limited to the following:

- Total number of new apprentices per year
- Total number of registered apprenticeship programs and program occupations
- Total number of registered pre-apprenticeship programs
- Expansion of registered apprenticeships and pre-apprenticeships into healthcare, advanced manufacturing, aviation and aerospace, information technology, and other emerging industries will take priority across the state.

Furthermore, this strategic policy outlines the framework, guidelines, and responsibilities of local workforce development boards to engage in allowable activities under WIOA to support the expansion of registered apprenticeships. These activities support quantitative outcomes for high-quality registered apprenticeships that align with industry needs, promote economic development, and lead to high wages for apprentices.

The CareerSource Florida Board of Directors and the Florida Department of Commerce will monitor progress and performance for this policy. CareerSource Florida shall implement regular reporting on the state's progress towards the goals set forth in this policy, which goes into effect upon action by the Board.

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## **FOR CONSIDERATION**

- **Approve CareerSource Florida Strategic Policy 2019.02.13.A.1 – Registered Apprenticeship Policy**



## Strategic Policy

2019.02.13.A.1

<b>Title:</b>	<b>Registered Apprenticeship Strategic Policy</b>
<b>Adopted:</b>	
<b>Effective:</b>	

### I. PURPOSE AND SCOPE

Statewide Registered Apprenticeship Program (RAP) expansion positions the Florida workforce development system to foster a robust and inclusive work-based training ecosystem focused on collaboration between business, workforce, and education. Apprenticeship strategies increase access to in-demand jobs and career pathways that drive economic growth and sustain the future workforce. Registered apprenticeships help businesses reach a broader and more diverse pool of workers while creating new career pathways for Florida workers. Registered apprenticeships provide job seekers with structured paid learning experience that results in a portable, nationally recognized industry credential.

A network-wide Registered apprenticeship strategy implemented by all local workforce development boards (LWDB) positions Florida to develop talent pipelines for Florida employers and establishes the state as a national leader in RAPs. This strategy fosters strong partnerships between LWDBs, economic developers, employers, educational institutions, and other key stakeholders.

This registered apprenticeship strategic policy establishes that CareerSource Florida, in partnership with the Florida Department of Commerce and the Florida Department of Education, will include specific goals for apprenticeship expansion in the Workforce Innovation and Opportunity Act State Plan. Goals are to include, but not be limited to the following:

- Total number of new apprentices and pre-apprentices per year
- Total number of registered apprenticeship program occupations
- Total number of registered pre-apprenticeship programs

- Expansion of registered apprenticeships and pre-apprenticeships into healthcare, advanced manufacturing, aviation and aerospace, information technology, and other emerging industries will take priority across the state.

This Registered Apprenticeship strategic policy further outlines the framework and guidelines for LWDBs to support the expansion of apprenticeships including engaging in allowable activities under the Workforce Innovation and Opportunity Act (WIOA) and other grant programs. These activities support quantitative outcomes for high-quality registered apprenticeships that align with industry needs, promote economic development, and lead to high wages for apprentices.

## **II. BACKGROUND**

The National Apprenticeship Act establishes registered apprenticeship as an evidence-based model for job seekers, providing them with in-demand job opportunities, defined career pathways, quantifiable skills, and a nationally recognized credential. A registered apprenticeship is an effective approach for building career pathways for individuals while meeting the workforce investment needs of Florida's employers. Title I of WIOA affirms a commitment to provide eligible participants with high-quality career and training services that lead to employment or postsecondary education, including training in targeted and in-demand industries and occupations. WIOA is the primary source of state and local funding for registered apprenticeship programs and can be used to support many components of RAPs, including on-the-job learning, related instruction, supportive services, and apprenticeship expansion activities.

Florida Governor's Executive Order Number 19-31 charts a course for Florida to become number one in the nation in workforce education by 2030, ensuring Florida students are prepared for the jobs of the future. The CareerSource Florida Board of Directors and its partners support registered apprenticeships as a powerful tool for workforce education, combining on-the-job learning with related technical instruction to create a highly skilled workforce.

The Reimagining Education and Career Help (REACH) Act enhances access, alignment, and accountability across Florida's workforce development system and provides opportunities for those with barriers to education and employment to become self-sufficient, improving access to good jobs and career pathways that offer economic prosperity. The REACH Act required implementation of a Comprehensive Employment, Education, and Training strategic policy approved by the CareerSource Florida Board of Directors. This policy requires LWDBs to implement strategies and policies that provide simplified and expanded access to employment, education, and training services including pre-apprenticeship, registered apprenticeship, and other work-based learning models. Such coordination must include, but is not limited to, conducting outreach with business leaders, local governments, and education partners.

Partnering with the Florida Department of Education, CareerSource Florida developed an Apprentice Florida Toolkit and invested in apprenticeship navigators to assist LWDBs, businesses, and other stakeholders in their efforts to develop registered apprenticeship strategies, recruit employers, participants, and apprentices, and expand the number of successful registered apprenticeship and pre-apprenticeship programs in their local areas.

## **III. POLICY**

### **LOCAL WORKFORCE DEVELOPMENT BOARD RESPONSIBILITIES**

The CareerSource Florida network supports RAPs with technical assistance and by leveraging WIOA funding to support eligible participants. LWDBs shall actively promote the benefits of Registered apprenticeships. Active promotion includes encouraging the development and use of RAPs by collaborating closely with local employers, industry associations, and educational institutions, and by partnering with the Florida Department of Education's Apprenticeship Training Representatives (ATR) in their region. Boards are allowed to serve as RAP sponsors and should strongly consider doing so in regions where there is employer demand for occupations, but no RAPs or employers are willing to sponsor them.

LWDBs shall also promote and support the development of registered pre-apprenticeship programs. Registered pre-apprenticeship programs are designed to prepare individuals for entry into RAPs by providing instruction and/or training to increase math, literacy, and other vocational and pre-vocational skills needed to begin a registered apprenticeship. A registered pre-apprenticeship program must be registered with the Florida Department of Education and have at least one registered apprenticeship partner.

Each LWDB and regional planning area shall implement apprenticeship strategies consistent with WIOA and Florida Statutes. These strategies shall be described in LWDB and regional planning area WIOA plans.

Each board shall have knowledge of the Florida Department of Education's inventory of both pre-apprenticeship and RAPs and be familiar with programs that are eligible to partner with local and regional employers. Additionally, boards will assist with creating and expanding registered pre-apprenticeship and apprenticeship programs throughout their region.

Where applicable, LWDBs shall leverage any federal waivers granted to the state to support apprenticeships.

Finally, LWDBs shall actively recruit apprentices and pre-apprentices for registered programs in their local and regional areas.

### **Support of Registered Apprenticeship Programs**

LWDBs shall use all allowable activities to support registered apprenticeships and pre-apprenticeships through WIOA and other relevant grant programs to ensure maximum flexibility in serving participants and supporting their placement into RAPs. Acceptable WIOA activities include:

- *Counseling and career services*
- *On-the-job training (OJT)*
- *Customized training*
- *Incumbent worker training (IWT)*
- *Occupational skills training*
- *Cohort training*
- *Work experience*
- *Internship*
- *Supportive services*

Additionally, registered apprenticeships may be supported by leveraging other workforce opportunities, including but not limited to:

- *Sector strategies*
- *Financial assistance*

- *Braided funding*
- *Referral to community services*
- *State-granted USDOL waivers*
- *State and federal tax credits*
- *Non-WIOA state and national grants*

The on-the-job learning component of a registered apprenticeship may be supported by an OJT, IWT, or customized training contract, and an ITA or a training contract may be used for the related instruction component. Both an ITA for classroom instruction (tuition) costs and a wage-reimbursement contract for work-based learning may be used, and supportive services may be provided if they are determined to be necessary for the completion of a training or career service activity. LWDBs are encouraged to work with other LWDBs for the purpose of supporting apprentices working for employers outside of their workforce region. LWDBs shall not develop policies that restrict the promotion of and support to RAPs, employers, and apprentices.

LWDBs shall collaborate with public and private education providers responsible for delivering the technical instruction necessary for registered apprenticeships. This collaboration should also extend to employers who are offering on-the-job training and mentorship, as well as the sponsors and intermediaries involved in apprenticeship programs. The goal is to foster cooperation and coordination within the workforce system, even in cases where the program sponsor, employer, and training provider are the same entity.

Each LWDB shall ensure compliance with federal and state regulations governing registered apprenticeships, including but not limited to WIOA, and are required to review and update existing local policies that may conflict with state or federal policies or with the direction provided in this policy.

### **Apprenticeship Navigators**

Each board shall designate an apprenticeship navigator who serves as the subject matter expert and liaison between LWDB staff, employers, training providers, and existing RAP sponsors. The apprenticeship navigator in each local area shall collect and share relevant apprenticeship data and participate in state sponsored apprenticeship training regularly to assist career centers in their efforts to coordinate a unified, seamless experience for employers and apprentices.

Each apprenticeship navigator shall collaborate with the Department of Education ATR in their region, and be familiar with ATRs in other regions, to assist with the creation of new RAPs, connect employers to existing programs, and to help recruit and support apprentices. Apprenticeship navigators will use Apprentice Florida leads, in addition to coordinating with career services teams to provide apprentices to employers.

### **Eligible Training Providers List**

WIOA allows LWDBs to fund training services for eligible participants through an Individual Training Account (ITA) if they are on the Eligible Training Providers List (ETPL). RAPs are automatically eligible to be added to the ETPL and can opt in by contacting FloridaCommerce at ETPL@commerce.fl.gov. RAPs that opt into the state ETPL must also be added to all local lists. LWDBs shall not require RAPs to complete additional forms, apply further eligibility criteria, or provide information beyond what is detailed in USDOL Training and Guidance Letter (TEGL) 8-19.

RAPs qualify as occupations in-demand in the local labor market and local boards do not need to determine “occupational-demand status.” Registered apprenticeship sponsors are also exempt

from many ETPL performance reporting requirements, as detailed in WIOA Sections 116(d)(4) and 122. However, RAPs may voluntarily report performance outcomes. Pre-apprenticeship programs do not have the same automatic eligibility but may apply through the normal ETPL application process if they plan to seek funding for participants through an ITA.

Increasing the number of RAPs on the ETPL will ensure access to a wide variety of quality job-driven training programs, improve customer choice for WIOA-eligible participants, and contribute to the strategic goals of apprenticeship expansion outlined in this policy. CareerSource Florida, FloridaCommerce, and Department of Education shall collaborate to ensure that all RAPs are encouraged to “opt-in” to the ETPL at the time of registration. Additionally, an ongoing effort shall be made to inform existing RAPs of the purpose of the ETPL, the value of inclusion, and their automatic eligibility status.

LWDBs may support apprenticeship programs through OJT, IWT, and customized training contracts without the program being included on the ETPL.

## **PERFORMANCE**

The CareerSource Florida Board of Directors and FloridaCommerce will monitor progress and performance for this policy. CareerSource Florida shall implement regular reporting on the state’s progress towards the goals set forth in this policy.

## **IV. AUTHORITY**

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

[Chapter 445.004, Florida Statutes](#)

[Chapter 446, Florida Statutes](#)

[Chapter 2023-81, Laws of Florida amending the Reimagining Education and Career Help Act](#)

[Chapter 6A-23.001-011, Florida Administrative Code](#)

[Training and Employment Guidance Letter No. 13-16](#)

[Training and Employment Guidance Letter No. 8-19](#)

[Training and Employment Guidance Letter 19-16](#)

[Training and Employment Notice 13-12 – Defining a Quality Pre-Apprenticeship Program and Related Tools and Resources](#)

[29-CFR-29 - Labor Standards for The Registration of Apprenticeship Programs](#)

[29-CFR-30 - Equal Employment Opportunity in Apprenticeship](#)

[CareerSource Florida Sector Strategies Strategic Policy](#)

[CareerSource Florida Comprehensive Employment, Education and Training Strategic Policy](#)



[WIOA In-School Youth Individual Training Accounts Waiver](#)

[WIOA Out-of-School Youth Expenditure Requirement Waiver](#)

## V. HISTORY

Date	Description
TBD	This policy revises and replaces CareerSource Florida Strategic Policy 2019.02.13.A.1 to include elements of Training and Employment Guidance Letter 19-16; REACH Act requirements; and CareerSource Florida Comprehensive Employment, Education, and Training Strategic Policy. Incorporated changes to Florida Statutes and new requirements for local workforce development boards pertaining to pre-apprenticeship and apprenticeship tools and apprenticeship navigators.
12/09/2021	Updated to reflect changes in workforce-related programs and services and comply with the 2021 REACH Act
02/13/2019	Approved by CareerSource Florida Board of Directors

## VI. ATTACHMENTS

[CareerSource Florida Administrative Policy Number 90: WIOA Eligible Training Provider List](#)

[CareerSource Florida Administrative Policy Number 009: On-the-Job Training Program](#)

[CareerSource Florida Administrative Policy Number 100: Work-Based Training](#)

[CareerSource Florida Administrative Policy Number 074: Individual Training Account Expenditure Requirements and Waiver Request Process](#)

[CareerSource Florida Strategic Policy 2018.02.14.A.2: Sector Strategy](#)

[Chapter 2021-164, Laws of Florida](#)

[Florida Executive Order 19-31](#)

## VII. OTHER RESOURCES

- [ApprenticeFlorida.com](#)
- [Apprenticeship.gov](#)

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

## **Action Item 2**

### **CAREERSOURCE FLORIDA ADMINISTRATIVE POLICY STATEWIDE STANDARDIZATION OF TOOLS AND SERVICES**

The Governor, the CareerSource Florida Board of Directors, and the Florida Department of Commerce (FloridaCommerce) are committed to the appropriate and full use of federal and state workforce development funds. Local workforce development boards and local workforce development areas are expected to work with state and local partners to develop plans, strategies, and policies that streamline employment and training programs; empower individuals to make informed decisions in choosing the qualified training programs that best meet their needs; and provide universal access through a one-stop delivery system for employment services for employers and job seekers.

In 2021, the Florida Legislature passed, and the Governor signed into law, the Reimagining Education and Career Help (REACH) Act which directs the state board to minimize duplication and maximize efficient use of resources directed to training and business services. In 2023, as part of its action on Reimagining Florida's Workforce System: A Three Pillar Plan for Transformation, the CareerSource Florida Board of Directors directed CareerSource Florida and FloridaCommerce, in collaboration with the Governor's REACH Office and local workforce development boards, to develop a plan for specific system-wide improvements for consistency, improved customer experience, and efficiencies including, but not limited to, technology, administration, fiscal, procurement/contracts, and programmatic policies.

Planning and preparation for Workforce System Transformation included in-depth analysis of the CareerSource network, review of organizational information, and broad stakeholder engagement. Executive Directors and Chief Executive Officers identified challenges in service delivery, and recommended improvements based on a shared desire to improve the service delivery experience using human-centered design for services and service delivery models made more efficient and effective by simplification, standardization, shared resources, and elimination of procurement restraints. Stakeholders, including education and community-based partners, shared challenges in collaborating with multiple workforce boards and communicating with career centers across multiple workforce areas. Boards also reported independent procurement of identical tools and services that served the same functionality but at varying price points across the state. Local workforce development boards identified opportunities to streamline operations and improve service delivery through state-level procurement of services that puts a premium on time and financial resources. Additionally, local workforce

development boards reported that services could be procured at a cost savings per board if procured by the state, thus reducing both overall cost and staff time expended on executing local public procurement processes.

On October 12, 2023, the CareerSource Florida Board of Directors approved [CareerSource Florida Strategic Policy 2023.10.12.A.1– Statewide Standardization of Tools and Services](#). This policy identifies goals to support partnership, encourage predictability, and ensure attainment of shared performance goals through state-procured technology, tools, and services used by all local workforce development boards, local workforce development areas, and regional planning areas. The Policies and Procedures of this strategic policy align with the goals of the Workforce Innovation and Opportunity Act (WIOA), Code of Federal Regulations, Chapter 445, Florida Statutes, and the REACH Act to ensure efforts by the state workforce board aimed at achieving efficiencies and consistency throughout the state are effective.

As part of its ongoing commitment to system-wide improvements, a stakeholder workgroup was convened to assist CareerSource Florida and FloridaCommerce in developing an administrative policy implementing the strategic policy. The workgroup included representatives from CareerSource Florida, FloridaCommerce, the Florida Workforce Development Association, and staff from local workforce development boards.

This administrative policy applies to CareerSource Florida, FloridaCommerce, and all local workforce development boards, local workforce development areas, and regional planning areas. The policy defines the following:

- Establishes a framework for decision-making that the state will use when engaging in initiatives to standardize service delivery and the use of designated tools and resources.
- Defines a waiver request process for boards to utilize if they choose to opt out of a state provided tool or service.

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## FOR CONSIDERATION

- **Approve CareerSource Florida Administrative Policy – Statewide Standardization of Tools and Services implementing the requirements**



## Administrative Policy

POLICY  
NUMBER  
XXX

<b>Title:</b>	<b>Statewide Standardization of Tools and Services</b>
<b>Program:</b>	Workforce Innovation and Opportunity Act
<b>Effective:</b>	TBD

### I. PURPOSE AND SCOPE

The purpose of this policy is to provide guidance to local workforce development boards (LWDBs) on the requirement for the statewide use of state-procured tools and services and the framework for decision-making. This policy also outlines the process by which LWDBs may request to waive the requirement for use of state-procured tools and services based on local variances.

### II. BACKGROUND

The Workforce Innovation and Opportunity Act (WIOA) (Pub. L. 113-128) is designed to help job seekers succeed in the labor market by providing access to employment, education, training, and support services, and to match employers with the skilled workers they need to compete in the global economy.

In 2021, the Florida Legislature passed, and the Governor signed into law, the Reimagining Education and Career Help (REACH) Act. In 2023, as part of its action on the [Reimagining Florida's Workforce System: A Three Pillar Plan for Transformation](#), the state workforce development board (state board) directed CareerSource Florida and the Florida Department of Commerce (FloridaCommerce), in collaboration with the Governor's REACH Office and LWDBs, to develop a plan for specific system-wide improvements for consistency, improved customer experience, and efficiencies including, but not limited to, technology, administration, fiscal, procurement/contracts, and programmatic policies.

The REACH Act directs the state board to minimize duplication and maximize efficient use of resources directed to training and business services. Recent legislative changes to the REACH Act require the state board to implement consistent procurement policies and procedures and leverage buying power to

achieve cost savings. The state board, CareerSource Florida, and FloridaCommerce will pursue opportunities to standardize the customer experience across the CareerSource Florida network. Standardization of the customer experience includes, but is not limited to:

- (1) Developing required processes that ensure a unified customer experience.
- (2) Defining required elements of the customer experience that must be met by each LWDB, in consultation with local boards.
- (3) Implementing standard forms, contracts, and agreements to ensure partners can work with multiple LWDBs consistently and efficiently.
- (4) State-negotiated pricing for tools and services that meet the specific functional requirements established through this policy.
- (5) State-level procurement of tools that must be used by all LWDBs.

### III. AUTHORITY

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

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

[Chapter 2023 – 81, Laws of Florida, the Reimagining Education and Career Help Act](#)

[Chapter 445, Florida Statutes](#)

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

[Statewide Standardization of Tools and Services Strategic Policy](#)

### IV. POLICIES AND PROCEDURES

Tools and services negotiated and acquired at the state level must be used by all LWDBs that have an identified need for the specific purpose the tools and services have been acquired to fulfill. As such, LWDBs are prohibited from using funds subgranted by FloridaCommerce for the purchase of tools and services that are duplicative of state-procured resources without an approved waiver request.

LWDBs that have existing contracts with vendors for tools and services may continue to use the contracted resources until the current contracts end. LWDBs must not renew contracts for products and tools that have been acquired at the state level for statewide use without an approved waiver.

#### A. Establish Statewide Common Need(s)

Statewide standardization of tools and services begins with the identification of an issue or common need for the procurement or development of tools and

services. The Governor, Legislature, state board, CareerSource Florida, FloridaCommerce, workforce system partners, LWDBs or regional planning areas (planning regions) may identify the need for a tool and/or service to be acquired at the state level. Further, changes in federal or state law, regulations, rules, policies, guidance, strategies, and processes may also require tools and services to be acquired at the state level for statewide implementation.

At the state level, a variety of steps may occur to establish the need for a particular standardized tool or service:

- (1) Solicit information on potential tools and services from appropriate stakeholders and interested parties.
- (2) Consult with stakeholders to determine whether there is a statewide need for specific tools and services.

LWDBs or regional planning areas may also submit a request for a tool or service to be acquired at the state level. The request must be made to FloridaCommerce and must clearly identify the tool or service being requested and the specific purpose it serves, including a compelling business case that justifies the need and describes the business need/issue the tool or service will help resolve. Additionally, the request must state the scope of the product or tool and clearly outline any identified duplication, lack of standardization, and the necessary business functions the proposed product or tool serves. Such requests must be submitted via email to FloridaCommerce at [LWDBGovernance@commerce.fl.gov](mailto:LWDBGovernance@commerce.fl.gov). Upon receipt and review of a request containing the above listed information, FloridaCommerce, in consultation with CareerSource Florida, will determine whether to approve the request for the tool or service to be acquired at the state level.

## **B. Needs Plan Development**

Statewide acquisition or development of tools and services that serve a common need will include a plan developed by CareerSource Florida and FloridaCommerce, in consultation with LWDBs. The plan will identify how the tool or service ensures standardization, enhances customer service, and/or efficiency.

The plan will address, at a minimum, the following considerations:

- (1) Process to be enhanced or common need to be satisfied.
- (2) How tools and services address and resolve a common need.
- (3) Tool and/or service options that will be developed or sought, for evaluation.
- (4) Improved functionality sought and associated business case.

- (5) Level of standardization to be achieved by resolving common need.
- (6) Available performance data and data gaps relevant to the area of need.
- (7) Modernization of delivery to be achieved by the recommended approach.
- (8) Time to implement standardized resources across designated geographic scope.
- (9) Performance indicators affected by implementation of recommended approach.
- (10) Cost savings comparison to current method, tool, or service if there is one.

Additional considerations may include:

- (1) Challenges and consequences of (not) implementing tools and services.
- (2) Time needed to acquire tools and services and prepare them for use.
- (3) Resources needed for training staff to implement designated tools and services.
- (4) Time needed to train businesses and job seekers to use the tools and services.
- (5) Availability of performance data to demonstrate efficiency/benefit to be gained.
- (6) Advantages and challenges anticipated in aligning identified resource(s) with existing business models and strategic plans.

### **C. Tool and Service Evaluation and Recommendation**

Evaluation and selection of a requested/proposed tool or service will include representatives from CareerSource Florida, FloridaCommerce, and LWDBs. Tools and services may be evaluated through surveys, product demonstrations, trial periods, etc. Once potential tools and services are determined, FloridaCommerce, in consultation with CareerSource Florida, will determine the plan and process for the resources to be acquired at the state level.

FloridaCommerce and CareerSource Florida, in consultation with the LWDBs, will re-evaluate the tools and services negotiated and acquired at the state level within six months of each contract's expiration date using the considerations outlined in **Section IV. B. Needs Plan Development** of this policy as a baseline to ensure that the tools and services meet, and are likely to continue to meet, the identified common needs. Should it be determined that the tools and services did not meet the identified common needs as initially established, FloridaCommerce and CareerSource Florida will collaborate with the appropriate stakeholders to consult on alternative tools and services for negotiation or acquisition by the state. Tools and services that are deemed to meet common needs may be renewed for continued statewide use.

### **D. Waiver Request Review Process**

Where tools and services are acquired or developed for implementation statewide, LWDBs seeking to opt-out of statewide implementation may request a waiver from FloridaCommerce for less than two years or until the current contract expires.

LWDBs that seek a waiver must submit a Standardization of Tools and Services Waiver Request (Attachment A) to FloridaCommerce via email at [LWDBGovernance@commerce.fl.gov](mailto:LWDBGovernance@commerce.fl.gov). The waiver request must include the following:

- (1) Description of existing and alternative tools and services in use, the function(s) performed by the resource(s), and the business/customer groups served by them.
- (2) Description of how existing tools, services, or items impact local and/or statewide performance measurement and management.
- (3) Assumptions and constraints associated with implementing acquired or developed statewide tool(s).
- (4) Description of how existing resources differ in specific, key respects from state-provided resource(s) and why those in use or desired are (un)necessary.
- (5) Anticipated cost savings, economies of scale, or other fiscal and/or functional efficiencies including estimated local/statewide return on investment.

FloridaCommerce, in consultation with CareerSource Florida, will review waiver requests for completeness and determine whether to approve the LWDB's request. FloridaCommerce will notify the LWDB of the outcome of the waiver review process within 30 days of the date the waiver request was received.

## **V. ATTACHMENTS**

Attachment A - Standardization of Tools and Services Request Form

## **VI. RESOURCES**

[Florida Workforce System Transformation Plan](#)



## Standardization of Tools and Services Waiver Request

**Name of Local Workforce Development Board:**

**Date of Submission:**

**Contact Person Name:**

**Phone:**

**Email Address:**

Describe existing and alternative tools and services in use, the function(s) performed by them, and the business/customer groups served by them.

Describe how existing tools, services, or items impact local and/or statewide performance measurement and management.

List assumptions and constraints associated with implementing acquired or developed statewide tool(s).

Describe how existing resources differ in specific, key respects from state-provided resource(s) and why those in use or desired are (un)necessary.

Describe anticipated cost savings, economies of scale, or other fiscal and/or functional efficiencies including estimated local/statewide return on investment.

**BY SIGNING BELOW, THE LOCAL WORKFORCE DEVELOPMENT BOARD EXECUTIVE DIRECTOR CERTIFIES THAT THE LOCAL WORKFORCE DEVELOPMENT BOARD REQUESTS TO OPT OUT OF THE TOOLS AND/OR SERVICES ACQUIRED OR DEVELOPED FOR IMPLEMENTATION STATEWIDE. THE LOCAL WORKFORCE DEVELOPMENT BOARD'S REQUEST INCLUDES DETAILED INFORMATION TO SATISFY THIS REQUEST AS OUTLINED IN ADMINISTRATIVE POLICY TBD.**

**EXECUTIVE DIRECTOR**

**Name:**

**Signature:**

**Date:**

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

## **Action Item 3**

### **CAREERSOURCE FLORIDA ADMINISTRATIVE POLICY REGIONAL PLANNING AREAS IDENTIFICATION AND REQUIREMENTS**

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.

On February 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.

To support Pillar III of the plan, CareerSource Florida Board of Directors approved [2023.09.19.A.1 – Regional Planning Areas Strategic Policy](#) which defined the requirements for regional planning areas in the state of Florida.

This CareerSource Florida administrative policy implements the requirements for designating local planning areas consistent with WIOA, the REACH Act, and the strategic and administrative policies of the state workforce development board. Specifically, this policy defines the process that local workforce development boards will follow to request designation as a regional planning area. It further provides the application and defines the necessary documents that must be submitted to request designation.

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## **FOR CONSIDERATION**

- **Approve CareerSource Florida Administrative Policy – Regional Planning Area Identification and Requirements**



## Administrative Policy

POLICY  
NUMBER  
  
XXX

<b>Title:</b>	Regional Planning Area Identification and Requirements
<b>Program:</b>	Workforce Innovation and Opportunity Act
<b>Effective:</b>	TBD

### I. PURPOSE AND SCOPE

The purpose of this policy is to outline the process for identifying regional planning areas (planning regions) for groups of two or more local workforce development areas (local areas) under the Workforce Innovation and Opportunity Act (WIOA), as well as the correlating regional planning requirements.

### II. BACKGROUND

Under WIOA (Pub. L. 113-128), as part of the process for developing the state plan, states must identify planning regions in the state after consultation with the local workforce development boards (LWDBs) and chief local elected officials (CLEOs) in the local areas. The Governor must assign local areas to a region prior to submission of the state's WIOA Unified or Combined Plan.

### III. AUTHORITY

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

[2 Code of Federal Regulations \(CFR\) 679.200-679.210; 20 CFR 679.500-679.540](#)

[CareerSource Florida Strategic Policy 2023.09.19.A.1 - Regional Planning Areas](#)

## **IV. POLICIES AND PROCEDURES**

The purpose of identifying planning regions is 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. Additionally, the state workforce development board (state board) has communicated the following goals for the creation of regional planning areas as they relate to Florida's Workforce Transformation Plan:

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

CareerSource Florida, in collaboration with the Governor's Reimagining Education and Career Help (REACH) Office, the Florida Department of Commerce (FloridaCommerce) and LWDBs, will develop recommendations to the Governor and state board for the identification of planning regions in the state.

### **A. Requirements for Identifying Planning Regions**

All local areas in the state must be part of a planning region. Two or more LWDBs may request for their local areas to be identified as a planning region by submitting the Request for Regional Planning Area Identification (Attachment A) and supporting documentation as outlined in the application to the Florida Department of Commerce (FloridaCommerce) via email at [LWDBGovernance@commerce.fl.gov](mailto:LWDBGovernance@commerce.fl.gov). FloridaCommerce will review the LWDBs' request for compliance with federal and state requirements as well as this policy. FloridaCommerce will make a recommendation for the state board's consideration on whether to approve the LWDBs' request to be identified as a planning region.

Requirements for identifying a planning region, per 20 CFR 679.210(b) and CareerSource Florida Strategic Policy 2023.09.19.A.1 are outlined as follows:

- (1) Planning regions must include, at a minimum, two contiguous local areas within Florida<sup>1</sup>.
- (2) Consideration will be given to the extent to which the local areas in the proposed planning region:
  - (a) Share a single labor market;
  - (b) Share a common economic development area; and
  - (c) Possess federal and non-federal resources, including appropriate education and training institutions, to administer activities under WIOA, subtitle B.
- (3) The following factors will also be evaluated:
  - (a) Population centers;
  - (b) Commuting patterns;
  - (c) Industrial composition;
  - (d) Location quotients;
  - (e) Labor force conditions; and
  - (f) Geographic boundaries.
- (4) The request must contain the signature of all the CLEOs of the units of local government that will make up the planning region in order to demonstrate that the request is the consensus of all the units of local government involved.
- (5) CareerSource Florida will submit its recommendation to the Governor within ten business days of the state board's decision.

## **B. Regional Planning Process Requirements**

Planning regions are subject to the regional planning requirements outlined in 20 CFR 679.510. LWDBs and CLEOs within an identified planning region must participate in a regional planning process that results in the:

- (1) Preparation of a regional plan that meets the requirements outlined in 20 CFR 679.510(a)(2), CareerSource Florida Strategic Policy 2023.09.19.A.1, and complies with the instructions issued by CareerSource Florida, in coordination with FloridaCommerce.

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<sup>1</sup> Although WIOA allows planning regions to also consist of one local area and two or more contiguous local areas in two or more states, Florida's planning regions will be two or more contiguous local areas within Florida.

- (2) Establishment of regional service strategies using cooperative service delivery agreements that include but are not limited to:
  - a. Consistent eligibility standards and enrollment processes.
  - b. Common training and coordination of supportive service offerings, as appropriate.
  - c. Common technology tools and sharing of data within tools outside of Employ Florida.
- (3) Development and implementation of sector strategies for in-demand sectors or occupations.
- (4) Collection and analysis of regional labor market data (in conjunction with the State<sup>2</sup>).
- (5) Coordination of administrative cost arrangements, including the pooling of funds for administrative costs, as appropriate.
- (6) Coordination of transportation and other supportive services, as appropriate.
- (7) Coordination of services with regional economic development services and providers.
- (8) Establishment of an agreement concerning how the planning region will collectively negotiate and reach agreement with FloridaCommerce on local levels of performance for, and report on, the performance accountability measures described in WIOA Sec. 116(c) for local areas or the planning region<sup>3</sup>.

### **C. Regional Plan**

LWDBs in an identified planning region will have to work together to formulate a regional plan as an addendum to each of their local plans in accordance with regional planning instructions issued by CareerSource Florida, in coordination with FloridaCommerce.

### **D. Continued Identification as a Regional Planning Area**

Once identified, planning regions will remain in effect as long as federal and state requirements for planning regions continue to be met. With each submission of the

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<sup>2</sup> The state will provide technical assistance and labor market data, as requested by local areas, to assist with such regional planning and subsequent service delivery efforts.

<sup>3</sup> WIOA sec. 107(d)(9) and [Administrative Policy 088 – Negotiated Local Levels of Performance Requirements](#) require that locals negotiate performance, and 20 CFR 679.510(a)(1)(viii) requires an agreement between the LWDBs and CLEOS for how a planning region will collectively negotiate and reach agreement with [FloridaCommerce] on local levels of performance. The representatives of each local area within a planning region are responsible for the performance negotiation process.



regional plan to the state, the respective LWDBs and CLEOs will certify that the requirements to be identified as a planning region continue to be met.

Subsequent to planning regions being initially identified, LWDBs that seek to be identified in a new planning region must submit a new Request for Planning Region Identification to FloridaCommerce in accordance with **Section IV.A. Requirements for Identifying Regional Planning Areas** of this policy.

The state's identified planning regions must be included in the state's WIOA Unified or Combined Plan. Therefore, requests to be identified as a planning region that are approved and coincide with the state's drafting of the Unified or Combined Plan will be included in the state's next submission of the plan to the U.S. Department of Labor. Requests to be identified as a planning region may be received at any time with review and consideration taking place at the next available meeting of the state board.

Please note, the Governor may review planning regions at any time to evaluate whether the planning region continues to meet the requirements of being identified as such. The Governor may also designate a planning region as authorized by WIOA.

## V. DEFINITIONS

- (1) **Consultation** – A robust conversation in which all parties are given the opportunity to share their thoughts and opinions.
- (2) **Local Workforce Development Area (Local Area)** – A geographical area that serves as the jurisdiction for the administration of workforce development activities and has been granted such designation by meeting criteria as prescribed in [Administrative Policy 94 – Local Workforce Development Area Designation](#).
- (3) **Local Workforce Development Board (LWDB)** – A board established under WIOA sec. 107, to set forth policy for the local workforce development system.
- (4) **Regional Planning Area** – A “planning region” as described in WIOA sec. 106(a)(2)(B).

## VI. RESOURCES

Attachment A: Request for Regional Planning Area Identification

## Request for Regional Planning Area Identification

Proposed Name of Planning Region:

Local Workforce Development Boards included (Two or more contiguous boards):

Date of Submission:

Contact Person Name(s):

Phone:

Email Address:

The request to be identified as a regional planning area (planning region) requires that the local workforce development boards have relevant relationships as evidenced by labor markets, economic development areas, education and training resources, population centers, commuting patterns, industrial composition, location quotients, labor force conditions, and geographic boundaries. By signing below, the chief local elected officials and the local workforce development board executive directors certify that the local areas request designation as a qualified regional planning area per CareerSource Florida Strategic Policy 2023.09.19.A.1. If the request for designation is approved, the local workforce development boards within the regional planning area will be required to engage in a regional planning process that will produce a Regional Plan to be added as an addendum to each local workforce development board plan per FloridaCommerce Regional Planning Instructions.

*{Remainder of page intentionally left blank.}*

*Signature Page*

<b>Local Workforce Development Board Executive Director “A”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “A”</b>	
Name and Title:	County:
Signature:	Date:

*Signature Page*

<b>Local Workforce Development Board Executive Director “B”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “B”</b>	
Name and Title:	County:
Signature:	Date:

*Signature Page*

<b>Local Workforce Development Board Executive Director “C”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “C”</b>	
Name and Title:	County:
Signature:	Date:

*Signature Page*

<b>Local Workforce Development Board Executive Director “D”</b>	
Name:	
Signature:	
Date of Submission:	

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

<b>Chief Local Elected Official - LWDB “D”</b>	
Name and Title:	County:
Signature:	Date:

## **Supporting Documentation for the Request for Regional Planning Area Identification**

Please provide information on the proposed regional planning area (planning region) to document relevant relationships between the local workforce development areas (local areas).

### **Single labor market:**

Describe any labor market relationships amongst the local areas within the proposed planning region. Per the U.S. Bureau of Labor Statistics, labor markets can be described as metropolitan statistical areas (MSAs) or micropolitan statistical areas ( $\mu$ SAs). Describe those areas located within the proposed planning region and any MSAs/ $\mu$ SAs that cross over multiple local areas, if applicable.

### **Common economic development areas:**

Describe any economic development area relationships amongst the local areas within the proposed planning region. Enterprise Florida regions are an option for defining those economic development areas, but if your planning region has well-established regional economic development organizations, those are also acceptable to describe.

### **Education and training resources to administer activities under the Workforce Innovation and Opportunity Act:**

Utilizing the eligible training providers available amongst the local areas in the proposed planning region, describe any training providers that cross local area lines and their capacity.

### **Population centers:**

Describe the population centers within the planning region and any relevant relationships amongst those population areas as desired. The U.S. Census Bureau, American Community Survey is a potential data source for these population estimates.

### **Commuting patterns:**

Describe the commuting patterns between counties within the proposed planning region. This does not need to be comprehensive amongst all counties in the planning region; however, describe any major notable relationships amongst these counties. The U.S. Census Bureau, OnTheMap data is a potential data source for these commuting pattern estimates.

### **Industrial composition and location quotients:**

Describe the industrial composition of the local workforce development areas or counties included within the proposed planning region. A full breakdown of industrial composition for the regional planning area by county is not required; however, please highlight any major relationships or similarities in industrial composition. When possible, please indicate the location quotient at the county level for any highlighted industries. The industry share of county employment at a 2-digit NAICS level from the U.S. Bureau of Labor Statistics is an acceptable data source for these estimates.

**Labor force conditions:**

Describe any current labor force conditions that may be present across the proposed planning region. This can include disaggregated unemployment rates, labor force participation rates, or any other pertinent labor force conditions that the proposed regional planning area would like to consider. The U.S. Bureau of Labor Statistics is an acceptable data source for these estimates.

**Geographic boundaries:**

Describe any pertinent geographic boundaries present within the planning region, including major waterways, ports, or other natural boundaries. Confirm that the proposed planning region is made up of two or more contiguous local areas.



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

## **Action Item 4**

### **Determination on Appeal of Credentials Review Committee Actions**

Pursuant to Chapter 445.004(4)(h), Florida Statutes, and the Reimagining Education and Career Help (REACH) Act, the CareerSource Florida Board of Directors appoints the Florida Credentials Review Committee to identify nondegree credentials and degree credentials of value for approval by the state workforce development board and inclusion on the state's Master Credentials List. The Credentials Review Committee acts as an advisory committee or similar group created by CareerSource Florida.

The Credentials Review Committee established a definition for credentials of value and, in alignment with federally funded workforce accountability requirements, created a Framework of Quality that undergoes a biennial review. The Credentials Review Committee developed a Master Credentials List and a process for the quarterly review and approval of credential applications. The Master Credentials List serves as the basis for the Florida Department of Education's Career and Professional Education (CAPE) Act Industry Certification Funding List. Applicants seeking eligibility for CAPE Act funding for secondary and postsecondary industry certifications must submit a Master Credentials List application. The submission must meet both CAPE eligibility criteria, as set forth in Rule 6A-6.0576, Florida Administrative Code & Florida Administrative Register, and standards defined in the Framework of Quality. Certifications that are added to the 2023-2024 Master Credentials list are also added to the 2023-2024 CAPE Industry Certification Funding List.

Subsequent to the September 6, 2023, Credentials Review Committee meeting, CareerSource Florida received a valid appeal of the denials for five of the received credential applications within the required timeframe. All five applications were submitted by a single entity.

Upon receipt of the appeal, the joint review team, composed of staff from CareerSource Florida, the Department of Education, and FloridaCommerce, reviewed the appeals and recommended the following actions:

1. **TOSA Graphics Certified User for Adobe – Graphic Design (advanced or higher)**
2. **TOSA JavaScript (advanced or higher)**
3. **TOSA Python (advanced or higher)**
4. **TOSA Web Developer (advanced or higher)**

All four of these credentials are currently on the Master Credentials List and eligible for secondary CAPE funding at the advanced or higher level of proficiency. An application was submitted to consider the credential for postsecondary CAPE funding. Current Florida Statute 445.004 requires performance funding eligibility be based on the highest available certification for postsecondary students. Accordingly, the application was originally denied for postsecondary funding eligibility because there was an expert level proficiency for the exam. Additionally, credentials must be linked to a Florida Department of Education postsecondary program curriculum frameworks. Upon reevaluation, the joint review team recommends that the **Tosa Graphics Certified User for Adobe – Graphic Design (expert level proficiency), TOSA JavaScript (expert level proficiency), TOSA Python (expert level proficiency), and TOSA Web Developer (expert level proficiency)** be granted eligibility for CAPE postsecondary funding for the 2024-2025 year. The expert level is the highest available certification and all four were found to be linked to postsecondary programs.

**5. TOSA WordPress (advanced or higher)**

The joint review team reviewed this certification and determined it did not meet the CAPE Postsecondary Funding Criteria because it could not be linked directly to the postsecondary programs submitted in the application.

## **FOR CONSIDERATION**

- **Approve the appeal of Miami Dade College and grant postsecondary CAPE funding for the following credentials for the 2024-2025 school year:**
  1. **TOSA Graphics Certified User for Adobe – Graphic Design (Expert Level)**
  2. **TOSA JavaScript (Expert Level)**
  3. **TOSA Python (Expert Level)**
  4. **TOSA Web Developer (Expert Level)**
- **Deny the appeal of Miami Dade College and uphold the decisions of the Florida Credentials Review Committee pertaining to:**
  5. **TOSA WordPress (Expert Level)**

## ATTACHMENTS

- [Framework of Quality](#)
- Appeal email dated September 21, 2023, from Miami Dade College to Adrienne Johnston, President and CEO of CareerSource Florida.
- Certification Applications for Tosa Graphics Certified User for Adobe – Graphic Design (advanced or higher), TOSA JavaScript (advanced or higher), TOSA Python (advanced or higher), TOSA Web Developer (advanced or higher), and TOSA Word Press (advanced or higher).

From: [Harrison, Malou](#)  
 To: [Adrienne Johnson](#); [Master Credentials List](#)  
 Cc: [Malou Harrison](#); [Rick Beasley](#)  
 Subject: APFSAL: Tosa Credentials  
 Date: Thursday, September 21, 2023 11:02:53 AM

CAUTION: This email originated from outside our organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Ms. Johnston:

We are in receipt of the Credential Review Committee's September 7<sup>th</sup> email response to our request to add credentials to the Master Credential List. We have provided pertinent replies (blue font), in the chart below, for the Review Committee's reconsideration of our request.

Please let this email serve as a formal appeal regarding the denial of the certifications outlined in the chart below. In short, we believe the replies we have provided below constitute grounds for the Committee's reconsideration. We would greatly appreciate the opportunity to meet in this important regard. Thank you for your consideration; we look forward to hearing from you.

Credential	Credentialing Agency	Reason for Denial
Tosa Autodesk AutoCAD	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . May your team please indicate where in statute, rule, or within the Framework of Quality exists the criteria for postsecondary eligibility?
Tosa Desktop Certified User for Google Workspace	Isograd	This credential was reviewed for the Master Credential List and was not approved due to lack of a direct occupational linkage. The application included a direct occupational linkage, namely Accountants and Auditors. The SOC meets all Framework of Quality Criteria. On what basis is this linkage an incorrect one?
Tosa Desktop Certified User for Microsoft Office	Isograd	This credential was reviewed for the Master Credential List and was not approved due to lack of a direct occupational linkage. The application included a direct occupational linkage, namely Accountants and Auditors. The SOC meets all Framework of Quality Criteria. On what basis is this linkage an incorrect one?
Tosa Graphics Certified User for Adobe - Graphic Design	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . May your team please indicate where in statute, rule, or within the Framework of Quality exists the criteria for postsecondary eligibility?
Tosa JavaScript	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . Other similar certifications are eligible for postsecondary funding. For example, Knowledge Pillars: JavaScript (KNOWL004), Python (KNOWL001), WordPress (KNOWL002), and HTML/CSS (KNOWL003) are all eligible for postsecondary funding. Certification Partners CIW: HTML/CSS (PROSO27), and JavaScript (PROSO17) are eligible for postsecondary funding. Why is the reason for being unable to make a program linkage? In addition, we would like to understand how the team concluded that TOSA's Advanced level is "easier" than the other postsecondary funding eligible certifications currently on the MCL.
Tosa Python	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . Other similar certifications are eligible for postsecondary funding. For example, Knowledge Pillars: JavaScript (KNOWL004), Python (KNOWL001), WordPress (KNOWL002), and HTML/CSS (KNOWL003) are all eligible for postsecondary funding. Certification Partners CIW: HTML/CSS (PROSO27), and JavaScript (PROSO17) are eligible for postsecondary funding. Why is the reason for being unable to make a program linkage? In addition, we would like to understand how the team concluded that TOSA's Advanced level is "easier" than the other postsecondary funding eligible certifications currently on the MCL.
Tosa Web Developer	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . Other similar certifications are eligible for postsecondary funding. For example, Knowledge Pillars: JavaScript (KNOWL004), Python (KNOWL001), WordPress (KNOWL002), and HTML/CSS (KNOWL003) are all eligible for postsecondary funding. Certification Partners CIW: HTML/CSS (PROSO27), and JavaScript (PROSO17) are eligible for postsecondary funding. Why is the reason for being unable to make a program linkage? In addition, we would like to understand how the team concluded that TOSA's Advanced level is "easier" than the other postsecondary funding eligible certifications currently on the MCL.
Tosa WordPress	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education. We recommended the <b>Advanced</b> level cut score for this credential <b>which is a minimum requirement adapted to post-secondary students</b> . Other similar certifications are eligible for postsecondary funding. For example, Knowledge Pillars: JavaScript (KNOWL004), Python (KNOWL001), WordPress (KNOWL002), and HTML/CSS (KNOWL003) are all eligible for postsecondary funding. Certification Partners CIW: HTML/CSS (PROSO27), and JavaScript (PROSO17) are eligible for postsecondary funding. Why is the reason for being unable to make a program linkage? In addition, we would like to understand how the team concluded that TOSA's Advanced level is "easier" than the other postsecondary funding eligible certifications currently on the MCL.

Sincerely,

Malou C. Harrison, PhD  
 Executive Vice President and Provost  
 Miami Dade College

From: Master Credentials List <[mcl@careersourceflorida.com](mailto:mcl@careersourceflorida.com)>  
 Date: Thursday, 7 September 2023 at 10:17  
 To: [malou.harrison@mdc.edu](mailto:malou.harrison@mdc.edu); [malou.harrison@mdc.edu](mailto:malou.harrison@mdc.edu); Rick Beasley <[rick.beasley@careersourcefl.com](mailto:rick.beasley@careersourcefl.com)>  
 Cc: Mathieu Lillo <[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)>  
 Subject: Tosa Credentials

Thank you for submitting credentials for consideration by the Florida Credentials Review Committee. The Master Credentials List, required by the Reimagining Education and Career Help (REACH) Act, is a comprehensive list of state-approved degree and non-degree credentials of value that prepare Floridians for in-demand occupations. To be eligible for the Master Credentials List, a credential must satisfy:

- The definition of a credential as defined in [Chapter 14.36\(2\)\(a\), Florida Statutes](#) and, as appropriate, the definition of an industry certification as defined in [Rule 6A-6.0576, Florida Administrative Code & Florida Administrative Register](#).
- The criteria of the [Framework of Quality](#) for demand, wages and, as appropriate, credential sequencing.

To be considered for addition to Florida's Master Credentials List, submitters must provide, at a minimum, evidence that the credential meets labor market demand as identified by the Labor Market Statistics Center within the Florida Department of Commerce or the Labor Market Estimating Conference or meets local demand as identified in the criteria adopted by the Credentials Review Committee. Evidence considered by the Credentials Review Committee includes employer information on present credential use or emerging opportunities.

Secondary and postsecondary industry certifications and licenses seeking eligibility for [Career and Professional Education \(CAPE\) Act](#) funding must submit a Master Credentials List application. The submission must meet both CAPE eligibility criteria set forth in [Rule 6A-6.0576, Florida Administrative Code & Florida Administrative Register](#) and standards defined in the Framework of Quality.

The credentials described below were received through the [Master Credentials List Application](#) online. A review team consisting of staff from CareerSource Florida, the Florida Department of Education, Division of Career and Adult Education and the Florida Department of Commerce reviewed all credentials. The review team and Credentials Review Committee noted the following deficiencies in the credentials below:

Credential	Credentialing Agency	Reason for Denial
Tosa Autodesk AutoCAD	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential.
Tosa Desktop Certified User for Google Workspace	Isograd	This credential was reviewed for the Master Credential List and was not approved due to lack of a direct occupational linkage.
Tosa Desktop Certified User for Microsoft Office	Isograd	This credential was reviewed for the Master Credential List and was not approved due to lack of a direct occupational linkage.
Tosa Graphics Certified User for Adobe - Graphic Design	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential.
Tosa JavaScript	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education.
Tosa Python	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education.
Tosa Web Developer	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education.
Tosa WordPress	Isograd	This credential remains on the Master Credentials List. This credential was reviewed in May 2023 for the Master Credentials List and was approved as "Advanced or higher level only." The credential is eligible for CAPE Secondary but not recommended for CAPE Postsecondary because this is not the highest level for the credential. This credential is not linked to a postsecondary program by the Florida Department of Education.

Submitters are encouraged to resolve the deficiencies with these credentials and submit them prior to the deadline for consideration in advance of the next Credentials Review Committee meeting. Information about the Framework of Quality, Master Credentials List and answers to frequently asked questions can be obtained [online](#). The process for appealing this decision is outlined in Section H of the [Credentials Review Committee Charter](#). Thank you again for your participation in this process.

Sincerely,

**Warren Davis**  
Policy Analyst  
 CareerSource Florida

PLEASE NOTE: This email communication may contain confidential information protected from disclosure by privacy laws and is intended for the use of the individual named. Dissemination, distribution or copying of this communication by anyone other than the intended recipient may be a violation of federal and state privacy laws. If you have received this email in error, please notify the sender immediately and delete this message. Please also note that Florida has a broad public records law and that all correspondence from or to me via email may be subject to disclosure, including email addresses.



**Which type of submitter are you?**

Florida College System

**Choose the Florida college:**

Miami Dade College

**Submitter Contact Information**

**First Name**

Lizanette

**Last Name**

Koontz

**Job Title**

Industry Certification Coordinator

**Email Address**

lkoontz@mdc.edu

**Phone Number**

305-237-7465

**Which type of credential are you submitting?**

Industry Certification

**In addition to submitting the credential for consideration to be added to the Master Credentials List, are you submitting the credential through this application to also be considered for CAPE funding eligibility?**

YES

**Which type of CAPE funding eligibility should this credential be considered for:**

Postsecondary

**Degree or Non-Degree**

Non Degree

**Credential Information****FDOE Certification Code (if applicable)**

ISOGR006

**Name of the Credential**

Tosa Graphics Certified User for Adobe - Graphic Design

**Website with detailed information on the credential**

<https://www.tosa.org/EN/certificationbundle#adobe>

**Credentialing Agency Contact Information****Credentialing Agency**

Isograd

**Website containing information on the Credentialing Agency**

[www.tosa.org](http://www.tosa.org)

**Contact First Name**

Mathieu

**Contact Last Name**

Lillo

**Contact Email**

[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)

**Contact Phone Number**

360-831-0498

**Provide the program in which the credential is offered.****Program Title (if applicable)**

Digital Design, Digital Design 1, Digital Design 2, Commercial Art Technology, Commercial Photography Technology 1, Commercial Photography Technology 2, Digital Photography Technology, Marketing, Management and Entrepreneurial Principles, Digital Printing Technology, Marketing, Digital Media/Multimedia Design, Graphic Designers

**Program Number (if applicable)**

B070600, K700100, K700200, I480203, K610100, K610200, K100300, M200500, I480205, K100200

**CIP Number (if applicable)**

0510030306, 0510030307, 0510030308, 0650040208, 0650040605, 0650040606, 0650060502, 0252140104, 0610030501, 0609070208

**Credentials of value on the Master Credentials List must be linked to a Standard Occupation Classification (SOC) code. Provide the SOC code that the credential is linked to:**

27-3099

**The credential should lead to an occupation in an emerging industry or in an industry sector of focus. Choose the industry:**

Information Technology

**Describe how the credential is linked to the chosen occupation and industry, which skills are acquired through the credential, and whether the credential is required for the occupation?**

According to the figures presented on its website, Adobe holds a leading position in more than 40 categories, such as digital experience management platforms, content management systems, customer analytics, CRM lead management, digital commerce, enterprise marketing software suites, etc. The Adobe Creative Cloud mobile applications have been downloaded 449 million times.

Today, more than 90% of creative professionals worldwide use Adobe Photoshop. The wide distribution of the software over the past 30 years has allowed many professional specialties to develop, such as beauty retouching, production of journalistic images, retouching of industrial shots, and product sampling. At the same time, new markets have been created with the advent of digital technology: the creation of web interfaces, the creation of mobile application interfaces, motion design, and trade-in vector illustrations for non-creative users on a global scale. In the wake of these new categories entering the professional market, new specialties have developed, such as illustrative graphic design and data visualization. Adobe Illustrator has emerged as a real pillar of these new fields. Since the year 2000, Adobe InDesign has imposed itself as an essential and almost unique tool that any user wishing to produce quality, fast, and affordable communication must master.

The Tosa Graphics Certified User for Adobe – Graphic Design credential validates a candidate's versatility and expertise in the graphic design portion of the Adobe suite of applications. Candidates with this certification have demonstrated advanced skills and in-depth knowledge of a variety of the most popular Adobe graphic design applications.

To earn a Tosa Graphics Certified User for Adobe – Graphic Design certification, candidates must certify at the Advanced, or Expert levels in the Tosa Adobe Photoshop exam, plus one of Tosa Adobe Illustrator or Tosa Adobe InDesign exams.

## SKILLS – ADOBE PHOTOSHOP

The professional users of Adobe Photoshop are varied. They can be either directly employed by companies, by small agencies, or offer their services individually as freelancers.

Individuals with Photoshop skills manage the software interface, integrate geometry and image correction, use photomontage tools, work with graphical functions, and can export and use automation to speed up their productivity.

The skills documented by the Tosa Adobe Photoshop certification align and include, but are not limited to, media and communication workers, communication officers, graphic interface designers, community managers, graphic designers, and other occupations that require sufficient knowledge and skills in Adobe Photoshop to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- Setting up and customizing the Photoshop workspace environment
- Creating specific parameters
- Transferring files
- Customizing units using measurement and analysis tools
- Transforming, putting to perspective, and correcting distortion
- Using layers and Smart objects to perform non-destructive work



- Adjusting colors non-destructively
- Using the color palette and exporting with CMYK and RGB
- Using layers, masks, and generating transparency
- Correcting and decomposing layers
- Creating customized tools
- Using filters and Smart objects
- Combining and/or modifying effects or layers
- Creating actions, automated batches, and creating scripts

## SKILLS – ADOBE ILLUSTRATOR

Candidates with strong Illustrator skills are able to optimize the design process, use the full range of tools to correct an object to achieve an accurate result, or use the retouching functions to edit illustrations.

The skills documented by the Tosa Adobe Illustrator certification align and include, but are not limited to, media and communication workers, communication officers, graphic interface designers, community managers, graphic designers, and other occupations that require sufficient knowledge and skills in Adobe Illustrator to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- Managing the Illustrator workspace environment
- Creating and transforming objects
- Managing typography, justification, and text objects
- Distorting objects and extracting illustrations
- Managing PDF files
- Using styles and exporting them to libraries
- Managing RGB and CMYK color types, color charts, and color guides
- Creating graphs and structuring data
- Formatting
- Exporting
- Generating resources
- Extracting and exporting parts of artwork
- Managing printing

## SKILLS – ADOBE INDESIGN

The professional users of Adobe InDesign are varied. They can be either directly employed by companies, by small agencies, design studios, or offer their services individually as freelancers.

Individuals with strong knowledge of InDesign can format the different blocks and texts in a professional way, customize the layout of texts and tables, edit images and graphical objects, and set up cascading styles.

The skills documented by the Tosa Adobe InDesign certification align and include, but are not limited to, media and communication workers, communication officers, graphic interface designers, community managers, graphic designers, and other occupations that require sufficient knowledge and skills in Adobe InDesign to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- Organizing and setting up the workspace
- Importing text and managing templates with Parent and Child templates
- Managing page options
- Setting up pagination and formatting images for printing
- Managing the layout
- Building a table

- Importing images, re-editing, updating links, and scaling images
- Activating paths and placing and managing text blocks
- Using color panels and adjusting styles
- Managing Parent and Child styles
- Automating the formatting of paragraphs, objects, and paintings
- Inserting text variables
- Synchronizing documents

**Are you submitting the credential based on state/regional or local demand?**

State-Regional Demand

**Is the credential linked to an occupation designated as an area of concern, either statewide or for an individual region, in the conference products adopted by the by the Labor Market Estimating Conference on July 14, 2023?"**

YES



**Which type of submitter are you?**

Florida College System

**Choose the Florida college:**

Miami Dade College

**Submitter Contact Information**

**First Name**

Lizanette

**Last Name**

Koontz

**Job Title**

Industry Certification Coordinator

**Email Address**

lkoontz@mdc.edu

**Phone Number**

305-237-7465

**Which type of credential are you submitting?**

Industry Certification

**In addition to submitting the credential for consideration to be added to the Master Credentials List, are you submitting the credential through this application to also be considered for CAPE funding eligibility?**

YES

**Which type of CAPE funding eligibility should this credential be considered for:**

Postsecondary

**Degree or Non-Degree**

Non Degree

**Credential Information****FDOE Certification Code (if applicable)**

ISOGR002

**Name of the Credential**

Tosa JavaScript

**Website with detailed information on the credential**[https://www.tosa.org/EN/javascript-certification?sbj\\_id=319](https://www.tosa.org/EN/javascript-certification?sbj_id=319)**Credentialing Agency Contact Information****Credentialing Agency**

Isograd

**Website containing information on the Credentialing Agency**[www.tosa.org](http://www.tosa.org)**Contact First Name**

Mathieu

**Contact Last Name**

Lillo

**Contact Email**[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)**Contact Phone Number**

360-831-0498

**Provide the program in which the credential is offered.****Program Title (if applicable)**

Web Application Development &amp; Programming

**Program Number (if applicable)**

Y700500

**CIP Number (if applicable)**

0511020102

**Credentials of value on the Master Credentials List must be linked to a Standard Occupation Classification (SOC) code. Provide the SOC code that the credential is linked to:**

15-1231

**The credential should lead to an occupation in an emerging industry or in an industry sector of focus. Choose the industry:**

Information Technology

**Describe how the credential is linked to the chosen occupation and industry, which skills are acquired through the credential, and whether the credential is required for the occupation?**

One of the great revolutions in the world of work in recent years is the massive arrival of IT in all sectors and most professions. In 2021, 89% of companies say they are working on their digital transformation.

The first consequence of this evolution is the massive recruitment of profiles with these new skills. The professional users of JavaScript are varied: Business Analysts, biostatisticians, Developers, Data Scientists, JavaScript experts, Technical experts, and other occupations that require sufficient knowledge to perform tasks encountered daily in the professional environment. Professionals with strong JavaScript skills have theoretical knowledge of the programming language but also the ability to write lines of code. They are proficient in reading and understanding the program as well as in the production of readable and reusable code and in the use of packages and API integration.

The skills documented by the Tosa JavaScript certification align and include, but are not limited to, business analysts, web developers and digital interface designers, data scientist, technical experts, and other occupations that require sufficient knowledge and skills in JavaScript to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- Knowing the main characteristics and specificities of the JavaScript language
- Knowing basic functionalities and syntax
- Managing the inputs, outputs, and errors of a program
- Creating and manipulating primitive objects, embedded objects, or more complex custom objects
- Understanding and manipulating the properties of an object
- Understanding and manipulating the prototype of objects
- Creating shareable and reusable features
- Retrieving data from a server
- Creating and manipulating asynchronous functions
- Managing errors and successes during the execution of a program
- Writing a program that handles different types of data in an optimized way
- Understanding and finding errors within a code and correcting them
- Searching for information in the documentation
- Reading and understanding a stack trace to deduce the origin of a bug

**Are you submitting the credential based on state/regional or local demand?**

State-Regional Demand

**Is the credential linked to an occupation designated as an area of concern, either statewide or for an individual region, in the conference products adopted by the by the Labor Market Estimating Conference on July 14, 2023?"**

YES



**Which type of submitter are you?**

Florida College System

**Choose the Florida college:**

Miami Dade College

**Submitter Contact Information**

**First Name**

Lizanette

**Last Name**

Koontz

**Job Title**

Industry Certification Coordinator

**Email Address**

lkoontz@mdc.edu

**Phone Number**

305-237-7465

**Which type of credential are you submitting?**

Industry Certification

**In addition to submitting the credential for consideration to be added to the Master Credentials List, are you submitting the credential through this application to also be considered for CAPE funding eligibility?**

YES

**Which type of CAPE funding eligibility should this credential be considered for:**

Postsecondary

**Degree or Non-Degree**

Non Degree

**Credential Information****FDOE Certification Code (if applicable)**

ISOGR003

**Name of the Credential**

Tosa Python

**Website with detailed information on the credential**[https://www.tosa.org/EN/python-certification?sbj\\_id=101](https://www.tosa.org/EN/python-certification?sbj_id=101)**Credentialing Agency Contact Information****Credentialing Agency**

Isograd

**Website containing information on the Credentialing Agency**[www.tosa.org](http://www.tosa.org)**Contact First Name**

Mathieu

**Contact Last Name**

Lillo

**Contact Email**[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)**Contact Phone Number**

360-831-0498

**Provide the program in which the credential is offered.****Program Title (if applicable)**

Web Application Development &amp; Programming

**Program Number (if applicable)**

Y700500

**CIP Number (if applicable)**

0511020102

**Credentials of value on the Master Credentials List must be linked to a Standard Occupation Classification (SOC) code. Provide the SOC code that the credential is linked to:**

15-1231

**The credential should lead to an occupation in an emerging industry or in an industry sector of focus. Choose the industry:**

Information Technology

**Describe how the credential is linked to the chosen occupation and industry, which skills are acquired through the credential, and whether the credential is required for the occupation?**

One of the great revolutions in the world of work in recent years is the massive arrival of IT in all sectors and most professions. In 2021, 89% of companies say they are working on their digital transformation.

The first consequence of this evolution is the massive recruitment of profiles with these new skills.

Whereas digital technology and computer programming were once reserved for a fraction of the workforce, today, more and more professions are in contact with these technologies. Biologists who need to aggregate results, business analysts who want to enhance performance measurement, marketing managers who want to find trends, etc., are all fields that now utilize some form of mass data collection. Therefore, these professionals will need a technology that can greatly speed up the process: Python. The professional users of Python are varied: Business analysts, biostatisticians, developers, data scientists, Python experts, technical experts, and more.

Professionals with strong Python skills have theoretical knowledge of the programming language, but also the ability to write lines of code. They are proficient in reading and understanding programs and producing readable and reusable code, have skills in storing and structuring data within the program, know how to use packages, and finally, can model a problem and solve it efficiently with Python.

The skills documented by the Tosa Python certification align and include, but are not limited to, business analysts, web developers and digital interface designers, data scientists, technical experts, and other occupations that require sufficient knowledge and skills in Python to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- Knowing the context and use cases of Python
- Using syntax and semantics
- Managing input/output
- Importing and using data and objects
- Using standard library
- Knowing classical structures
- Using functions and procedures
- Object-oriented programming
- Code performance
- Using algorithms

**Are you submitting the credential based on state/regional or local demand?**

State-Regional Demand

**Is the credential linked to an occupation designated as an area of concern, either statewide or for an individual region, in the conference products adopted by the by the Labor Market Estimating Conference on July 14, 2023?"**

YES





**Which type of submitter are you?**

Florida College System

**Choose the Florida college:**

Miami Dade College

**Submitter Contact Information**

**First Name**

Lizanette

**Last Name**

Koontz

**Job Title**

Industry Certification Coordinator

**Email Address**

lkoontz@mdc.edu

**Phone Number**

305-237-7465

**Which type of credential are you submitting?**

Industry Certification

**In addition to submitting the credential for consideration to be added to the Master Credentials List, are you submitting the credential through this application to also be considered for CAPE funding eligibility?**

YES

**Which type of CAPE funding eligibility should this credential be considered for:**

Postsecondary

**Degree or Non-Degree**

Non Degree

**Credential Information****FDOE Certification Code (if applicable)**

ISOGR004

**Name of the Credential**

Tosa Web Developer

**Website with detailed information on the credential**

[https://www.tosa.org/EN/web-developer-certification?sbj\\_id=342](https://www.tosa.org/EN/web-developer-certification?sbj_id=342)

**Credentialing Agency Contact Information****Credentialing Agency**

Isograd

**Website containing information on the Credentialing Agency**

[www.tosa.org](http://www.tosa.org)

**Contact First Name**

Mathieu

**Contact Last Name**

Lillo

**Contact Email**

[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)

**Contact Phone Number**

360-831-0498

**Provide the program in which the credential is offered.****Program Title (if applicable)**

Digital Media/Multimedia Design, Applied Information Technology, Cloud Computing & Virtualization, Web Application Development & Programming, Web Development, Marketing, Management and Entrepreneurial Principles

**Program Number (if applicable)**

K100200, Y300400, Y100400, Y700500, Y700100, M200500

**CIP Number (if applicable)**

0609070208, 0511010302, 0511090200, 0511020102, 0511080100, 0252140104

**Credentials of value on the Master Credentials List must be linked to a Standard Occupation Classification (SOC) code. Provide the SOC code that the credential is linked to:**

29-2031

**The credential should lead to an occupation in an emerging industry or in an industry sector of focus. Choose the industry:**

Information Technology

**Describe how the credential is linked to the chosen occupation and industry, which skills are acquired through the credential, and whether the credential is required for the occupation?**

The growth of e-commerce (about 47% over the last 5 years) and the development of the Internet on cell phones have created a real challenge of digital transformation for companies. At the heart of the concerns, the creation and maintenance of websites, which are erected as new showcases for products and / or services offered. The results of various studies conducted on this subject corroborate this trend and note that all the companies surveyed integrate the need for a presence on the Internet, 68% of them going so far as to describe it as essential. HTML, CSS and JavaScript are essential languages for web development. Complementary, HTML and CSS ensure the static structuring (definition of the content and its layout) of a web page, while JavaScript guarantees its interactivity. Currently, most websites rely on HTML, CSS and JavaScript to ensure their proper functioning.

It is also worth noting the plurality of sectors of activity concerned, with 62% of respondents belonging to the consulting, retail, fashion/clothing, education/training, catering, communication/information/press, digital/multimedia/audiovisual, culture/entertainment/leisure, food and construction/public works sectors.

Candidates with strong HTML, JavaScript, and CSS skills have theoretical knowledge of programming languages, but also the ability to write lines of code and integrate the codes to build a website. They are proficient in reading and understanding programs, as well as in the production of readable and reusable code and in the use of packages and API integration. They master the languages, their syntax, data structuring, and joint integration of the three programming languages covered in the Tosa Web Developer certification.

The skills documented by the Tosa Web developer certification align and include, but are not limited to, computer user support specialists, business analysts, web developers and digital interface designers, data scientists, technical experts, and other occupations that require sufficient knowledge and skills in HTML, CSS, and JavaScript to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

Coding languages assessed: HTML, JavaScript, CSS

- Knowing the basic principles of the language
- Using different HTML elements with attributes
- Choosing the relevant HTML elements to meet a need
- Using advanced HTML elements (tables, forms, etc.)
- Knowing the main characteristics and specificities of the language
- Knowing the basic functionalities and syntax
- Creating and manipulating primitive objects, built-in objects, or more complex custom objects
- Understanding and manipulating the properties of an object
- Listening, reading, and modifying the DOM (Document Object Model)
- Knowing the basic principles and rules of the language
- Applying a style rule on an element with different methods
- Importing CSS style from another style sheet
- Positioning elements in a page and managing spaces, element size, and text
- Reading a CSS file written by another developer and using CSS rules inside an HTML file
- Integrating HTML, CSS, and JavaScript code together
- Writing CSS code for display customization
- Writing dynamic JavaScript code for a web page
- Solving a bug inside a complex code written by another developer
- Understanding the technical documentation of an external library

**Are you submitting the credential based on state/regional or local demand?**

State-Regional Demand

**Is the credential linked to an occupation designated as an area of concern, either statewide or for an individual region, in the conference products adopted by the by the Labor Market Estimating Conference on July 14, 2023?"**

YES



**Which type of submitter are you?**

Florida College System

**Choose the Florida college:**

Miami Dade College

**Submitter Contact Information**

**First Name**

Lizanette

**Last Name**

Koontz

**Job Title**

Industry Certification Coordinator

**Email Address**

lkoontz@mdc.edu

**Phone Number**

786-218-6344

**Which type of credential are you submitting?**

Industry Certification

**In addition to submitting the credential for consideration to be added to the Master Credentials List, are you submitting the credential through this application to also be considered for CAPE funding eligibility?**

YES

**Which type of CAPE funding eligibility should this credential be considered for:**

Postsecondary

**Degree or Non-Degree**

Non Degree

**Credential Information****FDOE Certification Code (if applicable)**

ISOGR005

**Name of the Credential**

Tosa WordPress

**Website with detailed information on the credential**[https://www.tosa.org/EN/wordpress-certification?sbj\\_id=61](https://www.tosa.org/EN/wordpress-certification?sbj_id=61)**Credentialing Agency Contact Information****Credentialing Agency**

Isograd

**Website containing information on the Credentialing Agency**[www.tosa.org](http://www.tosa.org)**Contact First Name**

Mathieu

**Contact Last Name**

Lillo

**Contact Email**[mathieu.lillo@isograd.com](mailto:mathieu.lillo@isograd.com)**Contact Phone Number**

360-831-0498

**Provide the program in which the credential is offered.****Program Title (if applicable)**

Applied Information Technology, Cloud Computing &amp; Virtualization, Commercial Art Technology, Marketing, Management and Entrepreneurial Principles

**Program Number (if applicable)**

Y300400, Y100400, I480203, M200500

**CIP Number (if applicable)**

0511010302, 0511090200, 0650040208, 0252140104

**Credentials of value on the Master Credentials List must be linked to a Standard Occupation Classification (SOC) code. Provide the SOC code that the credential is linked to:**

15-1257

**The credential should lead to an occupation in an emerging industry or in an industry sector of focus. Choose the industry:**

Information Technology

**Describe how the credential is linked to the chosen occupation and industry, which skills are acquired through the credential, and whether the credential is required for the occupation?**

WordPress is the most popular content management system in the world.

In the CMS market, WordPress accounts for 64.3% of all websites worldwide. The market share of the top 1,000 sites is 51.8%, reaching the 66.2% mark for new sites. That is more than 500 sites built every day with WordPress, while only 60 to 80 sites per day are built on platforms like Shopify and Squarespace. Real-time WordPress activity data shows that each month, more than 409 million people view more than 20 billion WordPress pages, with more than 70 million new posts and 77 million new comments. As a result, mastering WordPress is a highly sought-after professional skill in the web or IT professions, especially for integrators, web developers, web writers, and WordPress consultants. Candidates with strong knowledge of WordPress can use the software independently and create and manage a complete website.

The skills documented by the Tosa WordPress certification align and include, but are not limited to, web developers and digital interface designers, web editors, developers, and other occupations that require sufficient knowledge and skills in WordPress to perform the tasks encountered daily in a professional environment, as defined in the occupational outlook handbook by the Department of Labor:

- WordPress admin
- Updating and backing up websites
- WordPress configuration and security
- Plugins
- Widgets
- The WooCommerce plugin
- Pages and articles
- Content management
- Organizing your site using menus
- SEO
- Theme management
- Child themes

**Are you submitting the credential based on state/regional or local demand?**

State-Regional Demand

**Is the credential linked to an occupation designated as an area of concern, either statewide or for an individual region, in the conference products adopted by the by the Labor Market Estimating Conference on July 14, 2023?"**

NO

# Information Items





## Speaker Bios

### George Levesque

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George Levesque is a Shareholder in GrayRobinson's Tallahassee office. He focuses his practice on civil litigation, appellate and government matters.

Levesque began his career working in private practice focusing primarily on civil litigation defense. He then served as Special Counsel and policy advisor to the Florida Speaker of the House, representing that chamber in successful gaming compact negotiations on behalf of the State of Florida, among other achievements.

He served as General Counsel for the Florida House of Representatives, and most recently, as General Counsel to the Florida Senate. In those capacities, he advised and represented both chambers of the Legislature on legislation and litigation involving redistricting and challenges to the adequacy of Florida's public education system. As a policy advisor to presiding officers in both the Florida House and Senate, he has advised on subject matter areas that included the criminal and civil justice systems and the courts, regulated industries and professions, health care, insurance and taxation. In addition, during his time in the Senate, George served as a Senate Special Master and oversaw the Senate Special Master and claim bill processes.

### Keantha Moore

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Keantha Moore currently serves as deputy chief of the Bureau of One-Stop and Program Support with the Florida Department of Commerce.

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 starting as a front-line staff person helping to connect job seekers with employment, to her culminating role as the director of operational excellence. She then transitioned to the Florida Commerce team where she has served in several leadership capacities over the past seven years.

### Janeth Merchan

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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.

## 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 resides in Tallahassee.

both the Florida House and Senate, he has advised on subject matter areas that included the criminal and civil justice systems and the courts, regulated industries and professions, health care, insurance and taxation. In addition, during his time in the Senate, George served as a Senate Special Master and oversaw the Senate Special Master and claim bill processes.

## Marcus McBride

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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.

**GOVERNOR  
RON DESANTIS**



**State of Florida**  
Government Representative

**BOARD CHAIR  
STEPHANIE SMITH**



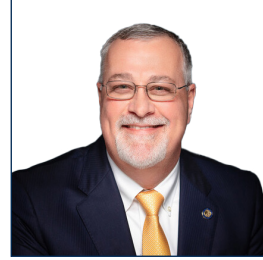
**TECO Energy**  
Business Representative

**JOHN ADAMS, JR.**



**Booz Allen Hamilton**  
Business Representative

**SEN. BEN ALBRITTON**



**Florida Senate**  
Government Representative

**JENNIFER O'FLANNERY  
ANDERSON, PH.D.**



**Community Foundation of Broward**  
Community-Based  
Organization Representative

**COMMISSIONER  
ERIK J. ARROYO**



**Band, Gates & Dramis**  
Business Representative

**BAYNE BEECHER**



**PGT Innovations**  
Business Representative

**KILEY DAMONE**



**FINFROCK DMC**  
Business Representative

**MANNY DIAZ, JR.**



**Florida Department of Education**  
Government Representative

**ROBERT DOYLE III**



**Florida Department of Education  
Division of Blind Services**  
Government Representative

**SOPHIA ECCLESTON**



**NextEra Energy Resources**  
Business Representative

**RYAN GOERTZEN**



**AAR Corporation**  
Business Representative

**ERIC HALL, ED.D.**



**Department of Juvenile Justice**  
Government Representative

**SHEVAUN HARRIS**



**Florida Department of  
Children and Families**  
Government Representative

**TIM HINSON**



**Miller Electric Co.**  
Labor Representative

**BILL JOHNSON**



**Autobahn Indoor Speedway**  
Business Representative

**J. ALEX KELLY**



**Florida Department of Commerce**  
Government Representative

**ALLISON KINNEY**



**HCA Healthcare**  
Business Representative

**JOE MARINO**



**Veterans Florida**  
Veterans Representative

**KEVIN MCDONALD**



**Allstate Insurance**  
Business Representative

**BRENT MCNEAL**



**Florida Department of Education  
Division of Vocational Rehabilitation**  
Government Representative

**REP. LAUREN MELO**



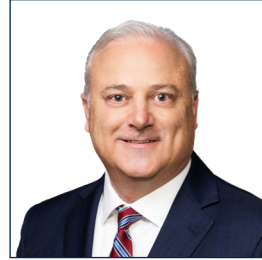
**Florida House of Representatives**  
Government Representative

**KEVIN O'FARRELL, PH.D.**



**Florida Department of Education  
Division of Career & Adult Education**  
Government Representative

**COMMISSIONER  
MEL PONDER**



**Okaloosa County**  
Elected Official – County

**MAYOR DARCY "D.C."  
REEVES**



**Mayor of Pensacola**  
Local Elected Representative

**LAURIE SALLARULO**



**Junior Achievement  
of South Florida**  
Youth Representative

**ROBERT SALONEN**



**Florida Institute of Technology**  
Education Representative

**PATSY SANCHEZ**



**Buena Vista Consultants, LLC**  
Business Representative

**BRIAN SARTAIN**



**Ontic**  
Business Representative

**ANDREW SCHMADEKE**



**Focus School Software**  
Business Representative

**LES SIMS**



**Armstrong Roofing, Inc.**  
Labor Representative

**MEREDITH  
BROCK STANFIELD**



**Florida Professional Firefighters, Inc.**  
Labor Representative

**EMMANUEL TORMES**



**The Boeing Company**  
Business Representative

**REP. DANA TRABULSEY**



**Treasure Coast Business Summit**  
Business Representative

**KIMBERLY RICHEY**



**DESIGNEE**  
**Florida Department of Education**  
Government Representative



## Workforce Innovation and Opportunity Act (WIOA) Regional Planning Areas Summary

In February 2023, the CareerSource Florida Board of Directors approved the [Reimagining Florida's Workforce System: A Three-Pillar Plan for Transformation](#) action item directing the CareerSource Florida Professional Team to develop recommendations to the Governor for the designation of regional planning areas made up of two or more local workforce development areas to further improve workforce system alignment with larger economic development areas to support economic mobility, growth, and prosperity. The Workforce Innovation and Opportunity Act (WIOA) establishes requirements for planning regions, also known as regional planning areas, which are further defined within the 2021 Reimagining Education and Career Help (REACH) Act and revisions enacted in 2023 with the passing of Florida Senate Bill 240, which was signed into law by Governor Ron DeSantis on May 15.

### Requirements for 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.

### Source Data for Decision Making

Source data needed to designate a regional planning area may be found in the following reports completed as part of CareerSource Florida’s Phase II Alignment Evaluation initiative conducted by Ernst & Young (EY) in September 2022 - March 2023.

[Future State Options](#) – This report includes multiple options for the realignment of Florida’s local workforce development areas. The state workforce development board chose to proceed with the option for 21 local workforce development areas. The report additionally includes data-supported options that consist of 16 or 19 local workforce development areas, which may be the basis for regional planning areas.

[Background Research and Analysis Report](#) – This report includes all the background data used to develop the options in the Future State Options report. This data may be used to designate regional planning areas beyond the potential new local workforce development area options presented to the state workforce development board in February 2023.

Additional Maps for Consideration – In addition to the options detailed in the Future State Options report, there are existing structures in Florida that may be consulted for future regional planning areas including [Florida Regional Planning Councils](#), [Florida Economic Development Regions](#) and [Designated Rural Areas of Opportunity](#).

### Next Steps

Below is a draft implementation timeline for designation of Regional Planning Areas.

Date	Event	Description
May 2023	Partners Council Meeting	Notify LWDB CEOs/Eds that Regional Planning Area Policy is being drafted for September 2023 Board Meeting. Provide a summary of what will be in the



		policy. Share discussion starter maps and foundational data from EY.
<b>Summer 2023</b>	Policy Development/ Implementation Planning	Continued development of policy to incorporate requirements from WIOA, REACH, state workforce development board, and FloridaCOMmerce. Collaborate with local workforce development board leaders through a stakeholder workgroup.  Target regional planning areas identified and impacted areas notified. Will require vendor to assist in identification of regional planning areas.
<b>September 2023</b>	Board Meeting	Regional Planning Area Policy presented to state workforce development board for approval. Draft map of planned regional planning areas presented to board with plan for implementation.
<b>December 2023</b>	Board Meeting	Local Workforce Development Areas 1-4 and Local Workforce Development Areas 17 and 19 provide notice to board that they intend to designate as a regional planning area.
<b>February 2024</b>	Board Meeting	2024-2028 WIOA State Plan presented to state workforce development board for approval prior to submission to USDOL.  First two regional planning areas submit all necessary documents for board approval of designation of regional planning area. Upon approval, board recommendation submitted to Governor.
<b>March 2024</b>	WIOA State Plan Submission	Plan submitted for public comment, then to USDOL for review and approval. Initial designated regional planning areas and all 21 newly designated local workforce development areas included in plan.
<b>April - May 2024</b>	Performance Negotiations	New regional planning areas establish WIOA performance goals as a region in addition to local workforce development area negotiations.
<b>June 2024</b>	Board Meeting	Additional local workforce development areas submit all necessary documents for board approval of designation of regional planning area. Upon approval, board recommendation submitted to Governor.
<b>September 2024</b>	Board Meeting	Additional local workforce development areas submit all necessary documents for board approval of designation of regional planning area. Upon approval, board recommendation submitted to Governor.
<b>Fall 2024</b>	Local/Regional Plan Submission	FloridaCommerce and EY create local and regional planning instructions per policy and newly designated regional planning areas and local workforce development areas develop plans.



<b>December 2024</b>	Board Meeting	Additional local workforce development areas submit all necessary documents for board approval of designation of regional planning area. Upon approval, board recommendation submitted to Governor.
<b>February 2025</b>	Board Meeting	Additional local workforce development areas submit all necessary documents for board approval of designation of regional planning area. Upon approval, board recommendation submitted to Governor.
<b>March 2025</b>	WIOA State Plan Modification Submitted	Additional planning areas designated and included in a WIOA State Plan modification to USDOL.
<b>June 2025</b>	Board Meeting	All local workforce development areas part of a designated regional planning area.
<b>March 2026</b>	WIOA Two-Year Modification Submitted	Required two-year modification submitted to USDOL with remaining regional planning areas designated.
<b>April - May 2026</b>	Performance Negotiations	New regional planning areas establish WIOA performance goals as a region in addition to local workforce development area negotiations.





## LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA- APPLICATION LETTER

To the CareerSource Florida Board of Directors,

Please accept this letter as a formal letter of intent for **CareerSource Palm Beach County and CareerSource Research Coast** to request designation as a regional planning area.

Our respective local workforce development boards of directors understand that regional planning area designation is predicated upon completing a formal application requesting the designation. We further understand that the regional planning area must have shared characteristics among the local areas including:

- Labor markets,
- Economic development areas,
- Education and training resources to administer activities under WIOA,
- Population centers,
- Commuting patterns,
- Industrial composition and industry sector alignment,
- Location quotients,
- Labor force conditions
- Geographic boundaries.

Per CareerSource Florida Strategic Policy 2023.09.19.A.1, if successfully designated as a regional planning area, we are committed to completing a regional WIOA plan inclusive of the following features and processes:

- 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.



## LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA- APPLICATION LETTER

- 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.

**Julia Dattolo of CareerSource Palm Beach County and Brian Bauer of CareerSource Research Coast** are currently in the process of obtaining the required approvals from elected officials to submit a formal designation request per the requirements forthcoming in the administrative policy. We expect to obtain approval from our local elected officials prior to the CareerSource Florida Board of Directors meeting scheduled for February 2024.

By signing below, as the Chairs of the **CareerSource Palm Beach County and CareerSource Research Coast** Board of Directors, we certify that our local workforce development boards intend to pursue designation as a regional planning area in accordance with FloridaCommerce and CareerSource Florida guidance.

Sincerely,

DocuSigned by:

*Christopher Cothran*

27D2D36A8A9F4B7...

**Christopher Cothran**

**CareerSource Palm Beach County** Chair, Board of Directors

DocuSigned by:

*Leslie Kristof*

222D52D0E860408...

**Leslie Kristof**

**CareerSource Research Coast** Chair, Board of Directors



LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA APPLICATION LETTER

To the CareerSource Florida Board of Directors,

Please accept this letter as a formal letter of intent for **CareerSource Escarosa, CareerSource Okaloosa Walton, CareerSource Chipola, and CareerSource Gulf Coast** to request designation as a regional planning area.

Our respective local workforce development boards of directors understand that regional planning area designation is predicated upon completing a formal application requesting the designation. We further understand that the regional planning area must have shared characteristics among the local areas including:

- Labor markets,
- Economic development areas,
- Education and training resources to administer activities under WIOA,
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  - Development and implementation of sector strategies for in-demand sectors or occupations.
  - Collection and analysis of regional labor market data.
  - Coordination of supportive services.

LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA APPLICATION LETTER

- 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.

**Marcus McBride of CareerSource Escarosa, Michele Burns of CareerSource Okaloosa Walton, Richard Williams of CareerSource Chipola, and Kimberly Bodine of CareerSource Gulf Coast** are currently in the process of obtaining the required approvals from elected officials to submit a formal designation request per the requirements forthcoming in the administrative policy. We expect to obtain approval from our local elected officials prior to the CareerSource Florida Board of Directors meeting scheduled for February 2024.

By signing below, as the Chairs of the **CareerSource Escarosa, CareerSource Okaloosa Walton, CareerSource Chipola, and CareerSource Gulf Coast** Board of Directors, we certify that our local workforce development boards intend to pursue designation as a regional planning area in accordance with FloridaCommerce and CareerSource Florida guidance.

Sincerely,



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**Kathaleen Cole**

**CareerSource Escarosa** Board of Directors

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**Scott Seay**

**CareerSource Okaloosa Walton** Board of Directors

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**Debbie Kolmetz**

**CareerSource Chipola** Board of Directors

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**Elinor Mount-Simmons**

**CareerSource Gulf Coast** Board of Directors

LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA APPLICATION LETTER

- 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.

**Marcus McBride of CareerSource Escarosa, Michele Burns of CareerSource Okaloosa Walton, Richard Williams of CareerSource Chipola, and Kimberly Bodine of CareerSource Gulf Coast** are currently in the process of obtaining the required approvals from elected officials to submit a formal designation request per the requirements forthcoming in the administrative policy. We expect to obtain approval from our local elected officials prior to the CareerSource Florida Board of Directors meeting scheduled for February 2024.

By signing below, as the Chairs of the **CareerSource Escarosa, CareerSource Okaloosa Walton, CareerSource Chipola, and CareerSource Gulf Coast** Board of Directors, we certify that our local workforce development boards intend to pursue designation as a regional planning area in accordance with FloridaCommerce and CareerSource Florida guidance.

Sincerely,

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**Kathaleen Cole**

**CareerSource Escarosa** Board of Directors



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**Scott Seay**

**CareerSource Okaloosa Walton** Board of Directors

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**Debbie Kolmetz**

**CareerSource Chipola** Board of Directors

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**Elinor Mount-Simmons**

**CareerSource Gulf Coast** Board of Directors



LOCAL WORKFORCE DEVELOPMENT BOARD REGIONAL PLANNING AREA APPLICATION LETTER

- Coordination of services with regional economic development services and providers.
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By signing below, as the Chairs of the **CareerSource Escarosa, CareerSource Okaloosa Walton, CareerSource Chipola, and CareerSource Gulf Coast** Board of Directors, we certify that our local workforce development boards intend to pursue designation as a regional planning area in accordance with FloridaCommerce and CareerSource Florida guidance.

Sincerely,

---

**Kathaleen Cole**

**CareerSource Escarosa** Board of Directors

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**Scott Seay**

**CareerSource Okaloosa Walton** Board of Directors

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**Debbie Kolmetz**

**CareerSource Chipola** Board of Directors



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**Elinor Mount-Simmons**

**CareerSource Gulf Coast** Board of Directors

# WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)

## Florida's Combined State Plan



The Workforce Innovation and Opportunity Act (WIOA) Unified Plan represents a strategic approach to workforce development at the state level. Under the WIOA Unified Plan, key workforce programs, including Adult, Dislocated Worker, Youth, Adult Education, and Vocational Rehabilitation are integrated into a singular, cohesive plan. This unified strategy streamlines coordination among the state's workforce development stakeholders, aligning their efforts to achieve shared goals.

The primary objective of the WIOA Unified Plan is to enhance the efficiency and effectiveness of workforce development activities, fostering a more seamless and integrated approach to addressing the needs of job seekers and employers alike.

As CareerSource Florida continues its commitment to advancing the state's workforce, there is a significant evolution underway—the transition from the WIOA Unified Plan to the WIOA Combined Plan. The WIOA Combined Plan represents an innovative shift in approach, building upon the successes of the Unified Plan while incorporating additional elements to further optimize workforce development efforts.

The transition to the WIOA Combined Plan is driven by a recognition of the need for increased flexibility and alignment in responding to the dynamic challenges of the modern workforce landscape. Unlike the singular focus of the Unified Plan, the Combined Plan allows for a more dynamic integration of key workforce programs. This approach enables CareerSource Florida to tailor strategies to better address the unique needs of diverse populations and industries across the state.

One of the primary reasons for this transition is the desire to foster a more comprehensive and collaborative approach to workforce development. The Combined Plan encourages the integration of various components, ensuring that programs are strategically aligned to maximize impact. By combining efforts, the plan facilitates a more cohesive response to the evolving needs of job seekers and employers, creating a more resilient and adaptable workforce ecosystem.

A key advantage of the WIOA Combined Plan lies in its inherent flexibility. This flexibility empowers CareerSource Florida to adapt swiftly to emerging trends, industry shifts, and economic fluctuations. The Combined Plan is designed to be dynamic, allowing for adjustments that better meet the real-time demands of the labor market. This adaptability ensures that workforce development strategies remain relevant and effective in an ever-changing environment.

Moreover, the WIOA Combined Plan promotes alignment not only within the state but also at the local and regional levels. By fostering collaboration among various stakeholders, including government agencies, educational institutions, and employers, the plan creates a synergistic network that shares resources, expertise, and best practices. This alignment enhances the overall impact of workforce development initiatives, promoting sustainable economic growth and prosperity for all Floridians.

The transition from the WIOA Unified Plan to the WIOA Combined Plan represents CareerSource Florida's commitment to innovation, collaboration, and adaptability in the pursuit of a workforce system that is both responsive and resilient. This evolution ensures that Florida's workforce development efforts remain at the forefront of addressing the evolving needs of the state's economy and its diverse population.

