

## Board of Directors Meeting Agenda

NOVEMBER 13, 2025 • 9:00 A.M. – 12:00 P.M., ET  
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### Chair's Welcome and Remarks

*Stephanie Smith*

### Consent Agenda

1. August 2025 Board of Directors Meeting Minutes
2. October 2025 Executive Committee Meeting Minutes
3. 2025-2026 Master Credentials List
4. Senior Chancellor Kevin O'Farrell Designee for Commissioner Kamoutsas
5. CareerSource Central Florida's Request to Serve as One Stop Operator
6. CareerSource North Central Florida's Request for New Area Designation
7. CareerSource South Florida's Request for Local Workforce Development Board Certification
8. CareerSource Gulf Coast's Request to Serve as One-Stop Operator
9. CareerSource Escarosa's Request for Local Workforce Development Board Certification
10. Sunset of ten (10) Workforce Policies and Guidance Documents:
  - Workforce Policy P51 – Medical Incapacity
  - Workforce Policy P71 – Final Guidance Food and Beverage for WIA Youth
  - Workforce Policy P120 – Youth Service Provider Selection
  - Workforce Policy P102 – Veteran Intake at Career Centers
  - Workforce Policy P103 – Local Veteran Employment Representative (LVER) and Disabled Veteran Outreach (DVOP) Program
  - Workforce Policy P112 – Staffing Requirements
  - Workforce Policy P117 Employment and Advocacy
  - Workforce Policy P119 – Consolidated Position Operational Requirements
  - Workforce Policy 2023.10.12.A.1 – Standardization of Tools and Services
  - Workforce Policy 2023.06.07.A.5 – Career Ladder Identifier and Financial Forecaster (CLIFF) Strategy

### President's Report

*Adrienne Johnston*

### Finance Council Report

*Robert Salonen*

### Strategic Policy and Performance Council Report

*Sophia Eccleston*

## Action Items

1. Acceptance of CareerSource Florida 2024-2025 Annual Audit
2. Workforce Policy - Policy O92 – Staff Training and Credentialing
3. Workforce Policy O124 – Statewide Standardization of Tools and Services
4. Workforce Policy P95 – WIOA Youth Program Eligibility and Service Provider Selection
5. Workforce Policy P111 – Services for Veterans, Members of the Military and Spouses

***Dana Davis***

***Victoria Gaitanis***

## Ethics and Open Government

***Brent McNeal***

## Purple Star Workforce Board Designations

***Adrienne Johnston***

## EDC of Florida's Space Coast

***Lynda Weatherman***

*President & CEO, EDC of Florida's Space Coast*

***Mildred Coyne***

*CEO, Coyne Workforce Solutions*

## FloridaCommerce Report

***J. Alex Kelly***

*Secretary, FloridaCommerce*

## Local Partners Report

***Joshua Matlock***

*President, Florida Workforce Development Association*

*CEO, CareerSource Suncoast*

## Open Discussion/Public Comment

## Chair's Closing Remarks

***Stephanie Smith***

## Information Items

## UPCOMING MEETINGS

Workforce Day at the Capitol – January 27, 2026

Board of Directors and Council Meetings – January 27-28, 2026, Tallahassee

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

## **Consent Item 1**

### **August 21, 2025, BOARD OF DIRECTORS 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 August 21, 2025, Board of Directors Meeting Minutes, to include any modifications or changes noted by the board.**

**CareerSource Florida  
Board of Directors Meeting Minutes  
August 21, 2025**

**I. Call to Order**

Chair Stephanie Smith called the Board of Directors meeting to order at 9:00 a.m. on August 21, 2025.

**II. Roll Call**

CareerSource Florida Board Relations Director Madison Frazee conducted a roll call. The following members were present:

Sophia Eccleston  
Jennifer O’Flannery Anderson  
Erik Arroyo  
Bayne Beecher  
Robert Doyle  
Ryan Goertzen  
Eric Hall  
Bridget Royster  
Tim Hinson  
Kim Richey  
Kate Doyle  
Joe Marino  
Kevin McDonald  
Lauren Melo  
Kevin O’Farrell  
Laurie Sallarulo  
Robert Salonen  
Brian Sartain  
Les Sims  
Scott Singer  
Meridith Stanfield  
Dana Trabulsy  
Clay Yarborough

**III. Chair’s Opening Remarks**

Chair Eccleston highlighted the meeting agenda and went over housekeeping items before moving into the Consent Agenda.

**IV. Consent Agenda**

Chair Eccleston presented the consent agenda.

**1. May 21, 2025, Board of Directors Meeting Minutes**

**2. Recommendation to Sunset 4 Workforce Policies and Guidance Documents**

- **Workforce Policy 30 – Supplemental Funding for Dislocated Worker Services**



- **Workforce Policy 4 – Professional or Other Organizational Membership Dues-Procedures**
- **Workforce Policy 113 – Disaster Recovery Dislocated Worker Grants Program Administration**
- **Final Guidance 017 – Procedures for the Closure of the One-Stop Delivery System Centers Due to Natural Disasters or Other Emergency Conditions**
- 3. 2025-2026 Master Credentials List**
- 4. Approval of Kate Doyle as FloridaCommerce Board Designee**
- 5. Approval of Wendy Castle as FloridaCommerce CRC Member**

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

**Motion:** Kevin McDonald

**Second:** Scott Singer

The consent agenda passed.

There were no public comments.

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

CareerSource Florida President and CEO Adrienne Johnston started off her report by providing an update on labor market and economic data before moving into a 2025-2025 set-aside summary. She then spoke to the CareerSource Florida network's impact by highlighting statistics from the 2024-2025 Annual Report.

Johnston also provided updates on the Purple Star Workforce Board Designation, Credentials Review Committee (CRC) and Master Credentials List (MCL), statewide workforce tools for FY 2025-2026, and hurricane and disaster preparedness before closing with some highlights from her recent events.

#### **VI. Joint Council Meeting Report**

Strategic Policy and Performance Council Chair Sophia Eccleston provided an update on the Joint Strategic Policy and Performance and Finance Council meeting from the day before, highlighting its agenda items, approved action items for the full board's review and discussion points.

#### **VII. Action Items**

CareerSource Florida Vice President of Workforce Program Development Victoria Gaitanis presented all six action items for the board's consideration, starting with first action item.

##### **1. Sunset Workforce Policy O106 - Memorandums of Understanding and Infrastructure Funding Agreements**

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

**Motion:** Eric Hall

**Second:** Robert Salonen

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

## **2. Revisions to Workforce Policy P9 - Availability of Services to Floridians**

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

**Motion:** Bayne Beecher

**Second:** Laurie Sallarulo

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

## **3. Revisions to Workforce Policy O15 - Emergency Response and Disaster Recovery**

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

**Motion:** Eric Hall

**Second:** Laurie Sallarulo

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

## **4. Revisions to Workforce Policy O122 - WIOA Adult and Dislocated Worker Program Eligibility**

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

**Motion:** Eric Hall

**Second:** Bayne Beecher

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

## **5. SNAP E&T Program Components and Case Management (New)**

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

**Motion:** Jennifer O'Flannery Anderson

**Second:** Robert Salonen

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

## **6. ITA Waivers**

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

**Motion:** Ryan Goertzen

**Second:** Jennifer O'Flannery Anderson

The action item passed unanimously. There was one public comment from CareerSource Citrus Levy Marion CEO Rusty Skinner providing clarification for his board's request for a lower percentage regarding the ITA Waiver Requests.

**VIII. Strengthening Credential Attainment Through Performance and Accountability**  
CareerSource Florida President and CEO Adrienne Johnsoton introduced panelists before diving into panel questions.

This panel explored how local workforce development boards and state partners are aligning performance and accountability strategies to increase meaningful credential attainment and support Florida's long-term talent goals. It also offered the board a deeper understanding of how Florida's workforce system is driving progress on this critical metric, and where strategic opportunities exist to further strengthen impact statewide.

**IX. Career Exploration and Workforce Development for DJJ Youth**

Deputy Secretary at the Florida Department of Juvenile Justice Adrienne Campbell kicked off the presentation speaking to the importance of aligning career exploration with technical skills development. She highlighted Florida Youth College and programmatic goals within DJ before handing it over to Dr. Byron Clayton, SVP & Chief of Sector Partnerships at CareerSource Tampa Bay.

Clayton provided information on CareerSource Tampa Bay's MyJourney Career Success Workshops, as well as feedback they've received from youth and top takeaways before concluding the presentation.

**X. CareerSource Florida Marketing Update**

CareerSource Florida Vice President of External Affairs and Strategic Initiatives Keri Nucatola updated the board on CareerSource Florida's advertising outreach, highlighting FY 2024-2025 Q3 results and FY 2025-2026 planning. She concluded her presentation reminding board members of how they can help activate the CareerSource Florida brand, including utilizing social media guides and following and sharing social media content.

**XI. Labor Market Update**

FloridaCommerce Bureau Chief of Workforce Statistics and Economic Research Jimmy Heckman provided a statewide labor market update. He went over the latest labor statistics, Florida's growing service population, unemployment rate by veteran status, as well as unemployment rate by disability status before concluding his report out.

**XII. FloridaCommerce Report**

FloridaCommerce Deputy Secretary Kate Doyle provided updates on how Florida is ranking in today's economy before going over some data including a \$1.7 billion tax reduction, \$5.4 billion in CapEx, and \$1.9 billion in intl. sales. Doyle highlighted grants awarded by FloridaCommerce in 2024-2025 and opportunities in 2025-2026 before concluding her report out with some FL WINS updates.

**XIII. Dept. of Children and Families Report**

Assistant Secretary Bridget Royster from the Department of Children and Families provided an update on efforts to promote economic self-sufficiency for Floridians through programs like SNAP, TANF, and Medicaid. She highlighted the continued success and expansion of the Hope Florida initiative, which connects individuals to community and workforce resources, helping thousands reduce reliance on public assistance. Royster emphasized the department's strong partnerships with CareerSource Florida, Florida

Commerce, and education partners to strengthen pathways to employment and prepare for upcoming federal changes to work requirements.

**XIV. Local Partners Report**

Florida Workforce Development Association (FWDA) President and CareerSource Suncoast President and CEO Josh Matlock emphasized the strength of Florida's locally driven workforce system and outlined his plan to regularly highlight best practices and innovations from across the state.

Matlock spotlighted a new automated monitoring tool developed by CareerSource South Florida that streamlines file reviews and improves efficiency across all boards. He also announced the upcoming Workforce Professional Development Summit in Orlando and discussed the formation of subject matter expert groups to support continuous learning and mentorship. He concluded by sharing a success story from CareerSource Suncoast's partnership with PGT, where a local apprenticeship program has produced multiple statewide award winners, showcasing the impact of local collaboration on workforce and business success.

**XV. Open Discussion/Public Comment**

Chair Eccleston opened up the floor for discussion amongst board members before asking if there were any comments from the public.

There were no public comments.

**XVI. Chair's Closing Remarks**

Chair Eccleston thanked the board for their attention and contributions during the meeting.

She noted upcoming meetings before adjourning the meeting.

The meeting was adjourned at 11:58 a.m.

*Additional meeting dialogue is recorded and available online at [this link](#).*

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

## **Consent Item 2**

### **OCTOBER 2025 EXECUTIVE COMMITTEE 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 20, 2025, Meeting Minutes, to include any modifications or changes noted by the board.**

**CareerSource Florida  
Executive Committee Meeting Minutes  
October 20, 2025**

**I. CALL TO ORDER**

Chair Stephanie Smith called the meeting to order at 2:30 p.m. ET.

**II. ROLL CALL**

The following members were present:

Stephanie Smith  
Jennifer O'Flannery Anderson  
Robert Doyle  
Sophia Eccleston  
Kevin McDonald  
Robert Salonen  
Meredith Stanfield

**III. ACTION ITEM**

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

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

**Motion:** Jennifer O'Flannery Anderson

**Second:** Kevin McDonald

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

The action item passed unanimously.

**IV. OPEN DISCUSSION/PUBLIC COMMENT**

There were no additional comments from the Committee or the public.

**V. CHAIR'S CLOSING REMARKS**

Chair Smith closed by thanking Committee members for their time and reminded them of upcoming CareerSource Florida meetings.

The meeting adjourned at 2:44 p.m. ET.

## VI. 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.

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Adrienne Johnston  
Board Secretary

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Date

*Additional meeting dialogue is recorded and available online at [this link](#).*

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

## Consent Item 3

### APPROVAL OF THE 2025-2026 MASTER CREDENTIALS LIST

The Reimagining Education and Career Help (REACH) Act amended Florida Statutes (F.S.) Section 445.004 and requires that the Credentials Review Committee (“the Committee”) define “Credentials of Value” and make recommendations for these credentials to be added to a state-approved Master Credentials List or MCL.

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 state-approved Master Credentials List.

By action of the Credentials Review Committee, the Framework of Quality has been amended three times since its adoption in 2022; once in September 6, 2023, to reflect statutory changes and to update the framework with references to current labor market information; once in August 14, 2024, to allow the Committee to consider more current labor market information identified by the Labor Market Statistics Center within the Florida Department of Commerce and the Labor Market Estimating Conference created in Section 216.136, Florida Statutes; and again in February 6, 2025, to evaluate the credentials based on value.

There was a total of 30 credential applications received by the September 30, 2025, deadline. These include:

- 20 submissions for new credential evaluation.
- 10 Submissions for credentials already on the MCL:
  - 2 submissions for credentials flagged for demand concerns
  - 4 submissions for credentials flagged for wage/SOC concerns.
  - 1 submission for a credential flagged for both demand and wage concerns.
  - 3 submissions for a credential seeking CAPE Post-secondary review.

In addition, the Interagency Review Team evaluated **1** new program of study for potential inclusion on the Master Credentials List (MCL) submitted by the Florida Department of Education.

In total, the interagency team evaluated **31** credentials.

The Interagency Review Team is a multi-agency group composed of representatives from CareerSource Florida, Florida Department of Education, FloridaCommerce, The REACH Office,



and Florida Department of Agriculture and Consumer Services (FDACS) (for agriculture-related credentials) evaluated the credential applications. Each credential was evaluated using the Framework of Quality to ensure it met the following criteria:

- **Alignment with Industry Certification Standards**  
The credential must meet the formal definition of an industry certification, including validation by a recognized certifying body.
- **Direct Linkage to Employment**  
The credential must demonstrate a clear and verifiable connection to a Standard Occupation Classification (SOC) code that reflects current labor market demand, meets established wage thresholds, and holds recognized value within the industry.
- **Evidence-Based Review**  
All evaluations were grounded in publicly accessible and verifiable documentation, ensuring transparency and consistency in the review process.

The evaluation of new credential applications led to the recommendation for the addition of **2** new credentials to the 2025-2026 Master Credentials List.

The newly adopted program of study is a Career Certificates and has been approved by the State Board of Education for implementation in the 2025–26 academic year. This program is presented as a consent item for approval by the CareerSource Florida Board of Directors.

Additionally, the evaluation of new credential applications led to the recommendation to deny 18 credentials for inclusion in the 2025-2026 Master Credentials List. These credentials did not meet the established criteria outlined in the Framework of Quality.

The interagency team successfully resolved a total of **3** flagged credentials. This includes resolving flags for demand for **2** credential applications and **1** application for wage and demand submitted by stakeholders. These efforts underscore a commitment to quality and systemic improvement.

In addition, **1** credential currently listed on the Master Credentials List (MCL) was submitted for CAPE Postsecondary funding consideration and was approved. While the disposition of the credential is noted here for recordkeeping purposes, final determinations regarding CAPE Postsecondary eligibility are made by the Florida Department of Education.

The evaluation of existing flagged credentials resulted in the recommendation to deny the removal of flags for **4** existing credentials submitted by stakeholders. These credentials failed to meet the standards established in the Framework of Quality. Applications for these credentials may be resubmitted, and there is ongoing communication with the submitters on the outlined deficiencies. Credentials flagged for the second year that fail to resolve deficiencies will need to apply to address the deficiencies by **December 1, 2025**. Credentials flagged for the first year that fail to resolve deficiencies will need to apply to address the deficiencies by **December 1, 2026**.

In addition, **2** existing credentials on the Master Credentials List (MCL) applied for CAPE Postsecondary funding consideration but were not approved. While the disposition of the credential is noted here for recordkeeping purposes, final determinations regarding CAPE Postsecondary

eligibility are made by the Florida Department of Education and questions regarding these determinations should be addressed to the Florida Department of Education.

The quarterly review and application evaluation was conducted by an interagency team of subject matter experts from the Department of Commerce, Department of Education, and CareerSource Florida. With the approval of the Credential Review Committee the 2025-2026 Master Credentials List will now include **2,391** total credentials consisting of:

- 296 degree credentials
- 881 non-degree credentials
- 580 industry certifications
- 592 registered apprenticeships
- 42 K-8 Cape digital tools

The Florida Credentials Review Committee met on November 6, 2025, and approved recommendations for the 2025-2026 Master Credentials List to be sent to the CareerSource Florida Board of Directors for delivery to the State Board of Education. Credentials identified for removal will remain on the list for at least two years after identification for removal. Valid submitters may reconcile eligibility issues and re-submit credentials.

After approval and prior to the State Board of Education meeting, there may arise the need for technical revisions to the list, such as revisions to certification names, availability of the certification, or code numbers that need to be revised.

## **FOR CONSIDERATION**

- **Approve sending the updated 2025-2026 Master Credentials List and send these recommendations to the State Board of Education.**
- **Approve technical revisions to the list by the Department of Education, as needed without adding or removing any credentials not explicitly described in this Action Item.**

## **ATTACHMENTS**

- [Framework of Quality](#)
- [2025-2026 Master Credentials List](#)

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 Education Commissioner Stasi Kamoutsas serves as a member of the CareerSource Florida Board of Directors.

Pursuant to the CareerSource Florida Bylaws, s. 4.17, Commissioner Kamoutsas designates Senior Chancellor Kevin O'Farrell to serve in his absence, subject to the board's approval.

### **FOR CONSIDERATION**

- **Approval of Florida Department of Education Commissioner Stasi Kamoutsas' request to appoint Senior Chancellor Kevin O'Farrell as designee to serve in his absence on the CareerSource Florida Board of Directors, contingent upon any additional information or approval signatures required.**



Ryan Petty, *Chair*  
Esther Byrd, *Vice Chair*  
*Members*  
Grazie P. Christie  
Layla Collins  
Daniel P. Foganholi, Sr.  
Kelly Garcia  
MaryLynn Magar

September 30, 2025

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

Dear Chairman Smith:

Section 445.004(3)(d), Florida Statutes, provides that one member representing each of the Workforce Innovation and Opportunity Act partners serves as a member of the CareerSource Florida Board of Directors. I am hereby designating Dr. Kevin O'Farrell, Senior Chancellor, to serve as my designee on the CareerSource Florida Board of Directors, effective September 15, 2025.

Sincerely,

A handwritten signature in blue ink, appearing to read 'AK', with a long horizontal stroke extending to the right.

Anastasios Kamoutsas

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

## Consent Item 5

### **CAREER SOURCE CENTRAL FLORIDA 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 operator, 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 Workforce 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.

The Florida Department of Commerce (FloridaCommerce) received a request from CareerSource Central Florida to serve as one-stop operator.

CareerSource Research Coast published a Request for Proposals (RFP) on August 1, 2025, for CareerSource Central Florida's one-stop operator. The deadline for proposals was August 22, 2025. CareerSource Central Florida was the only entity that submitted a proposal. The proposal was reviewed and rated based on the criteria outlined in the RFP. CareerSource Research Coast submitted an advisement letter to CareerSource Central Florida on August 28, 2025. On September 25, 2025, CareerSource Central Florida's Board of Directors was presented the recommendation for one-stop operator and approved the recommendation as shown in the meeting minutes. The contract with the current vendor ended on September 30, 2025. To ensure one-stop operator coverage, CareerSource Central Florida planned to begin one-stop operator activities on October 1, 2025 until the approval of the Chief Local Elected Officials (CLEOs) is received. The CLEOs are expected to approve the request at their December 2025 meeting.

Florida Commerce and CareerSource Florida reviewed CareerSource Central Florida's request to serve as a one-stop operator and other information provided. As referenced

in supporting documents, CareerSource Central Florida achieved or exceeded the state average for 16 of its adjusted performance targets for Program Year 2023-2024 and 17 of its negotiated performance targets for Program Year 2024-2025. Letter grades are assigned to LWDBs annually by October 15, following the close of each program year. CareerSource Central Florida currently holds an A score for its Program Year 2024-2025 performance.

FloridaCommerce confirms the requirements for designation as the one-stop operator have been sufficiently met by CareerSource Central Florida, pending approval by the local area's CLEOs.

FloridaCommerce and CareerSource Florida recommend conditional approval for LWDB 12 to serve as the one-stop operator effective October 1, 2025, through January 31, 2026.

## **FOR CONSIDERATION**

- **Conditionally approve CareerSource Central Florida to serve as one-stop operator for CareerSource Central Florida upon the approval of the local area's CLEOs.**

### **Attachments**

- CareerSource Central Florida's request for conditional approval to serve as the one-stop operator for CareerSource Central Florida.



**To:** Florida Commerce; CareerSource Florida  
**From:** Pamela Nabors, CEO  
CareerSource Central Florida  
[PNabors@careersourcecf.com](mailto:PNabors@careersourcecf.com)

Dear CareerSource Florida and Florida Commerce Representatives,

On behalf of the CareerSource Central Florida (CSCF) Board of Directors, I am pleased to submit the enclosed petition requesting approval for CSCF to serve as the One-Stop Operator (OSO) for Local Workforce Development Board (LWDB) 12 for the period of **October 1, 2025 through June 30, 2029**.

This petition reflects:

- Compliance with the **Workforce Innovation and Opportunity Act (WIOA)** and CareerSource Florida Administrative Policy 097;
- Evidence of a **competitive procurement process** conducted by CareerSource Research Coast;
- Documentation of **separation of duties, firewalls, and conflict-of-interest safeguards**; and
- Demonstration of **cost efficiency and fiscal responsibility**.

CSCF respectfully requests **provisional approval** effective October 1, 2025, to ensure no lapse in service occurs, with final Chief Local Elected Official (CLEO) approval anticipated in December 2025.

Please find attached the petition memorandum and supporting documentation for your review.

We appreciate your consideration of this request and look forward to your approval so that CSCF can continue to provide seamless, effective coordination of services for our region's workforce system. Should you have any questions or require additional information, I would be happy to provide it at your convenience.

Sincerely,

A handwritten signature in black ink that reads "Pamela Nabors".

Pamela Nabors



## **MEMORANDUM**

TO: Florida Commerce; CareerSource Florida  
FROM: CareerSource Central Florida (CSCF)  
DATE: 9/26/2025  
SUBJECT: Petition for Approval of CareerSource Central Florida as One-Stop Operator – LWDB 12

### **Purpose**

This memorandum serves as CareerSource Central Florida's (CSCF) formal petition for approval to serve as the One-Stop Operator (OSO) for Local Workforce Development Board (LWDB) 12, for the defined period of October 1, 2025 through June 30, 2029.

### **Background**

In Program Year 2023, CSCF procured Thomas P Miller and Associates (TPMA) as its One-Stop Operator. TPMA has since elected not to continue beyond June 30, 2025. CSCF negotiated with TPMA to extend its services through September 30, 2025, ensuring uninterrupted operations while CSCF initiated a competitive procurement process.

CareerSource Research Coast (CSRC) conducted the competitive procurement on behalf of CSCF. CSCF submitted a proposal, which was the sole response received. The CSRC Review Team determined CSCF's proposal met all technical requirements, scoring CSCF as the recommended provider. A formal recommendation was issued for CSCF to assume OSO responsibilities.

### **Request for Approval**

CSCF petitions Florida Commerce and CareerSource Florida to approve CSCF as the OSO for LWDB 12 effective October 1, 2025 – June 30, 2029.

This petition meets all requirements for approval:

- Defined duration: Four (4) years, renewable annually, consistent with WIOA regulations
- Competitive procurement: RFP-CSCF-25-OSO-01 was released on August 1, 2025 and administered by CSRC
- Organizational structure and firewalls: CSCF has documented clear separation of duties between OSO functions and direct career services, consistent with 20 CFR § 679.430 and CareerSource Florida policy
- Conflict of interest compliance: CSCF has in place strict conflict-of-interest and firewall policies, supported by internal governance procedures.





- Cost efficiency: CSCF's in-house OSO proposal (\$22,857 annualized) saves approximately \$37,143 (62%) compared to TPMA's contract, redirecting resources to participant services

### **Provisional Approval**

CSCF further requests provisional approval beginning October 1, 2025, to prevent any lapse in designation or service delivery. CSCF's Chief Local Elected Official (CLEO) will take formal action in December 2025 to provide written approval.

### **Conclusion**

Approval of this petition ensures continuity of services, compliance with WIOA requirements, fiscal responsibility, and effective coordination of the one-stop system. CSCF is committed to fulfilling all responsibilities of the OSO role while maintaining clear separation from direct service delivery.

### **Attachments**

RFP-CSCF-25-OSO-01 (Final Issued Version)  
Statement of Work – One-Stop Operator  
Internal Memo – Review Team Results and Recommendation  
CSRC Recommendation Letter (August 28, 2025)  
Cost Analysis Comparison (TPMA vs. CSCF Proposal)  
CSCF One Stop Operator Policy  
Organizational Chart (showing OSO role, separation of duties, firewalls, and conflict-of-interest compliance)



**DRAFT**

**Board of Directors Meeting**

**Thursday, September 25, 2025 9:00 a.m.**

**MINUTES**

- MEMBERS PRESENT:** Sheri Olson, Andrew Albu, Robert Bixler, Sean Donnelly, Casey Ferguson, Wendy Ford, Tanisha Nunn Gary, Mark Havard, Jeff Hayward, Molly Kostenbauder, Lindsey LeWinter, Nicole Martz, Snak Nakagawa, Gaby Ortigoni, Chris Pascal, Trey Simpkins, Michelle Sperzel, David Sprinkle, DeAnna Thomas, Eric Ushkowitz, Matt Walton, and Richard Watford
- MEMBERS ABSENT:** Sharon Arroyo, Joe Battista, Wendy Brandon, Gui Cunha, John Gill, Kristin Gray, Shawn Hindle, Catherine McManus, Brinkley Ruffin, Amy Santorelli, Jonathan Schaefer, Stella Siracuza, Richard Sweat, and Kristin Williams
- STAFF PRESENT:** Pam Nabors, Tadar Muhammad, Leo Alvarez, Dyana Burke, Steven Nguyen, Nilda Blanco, Gina Ronokarijo, Marcla DeFaria, Geo Morales, Sean Masherella, Vince Bruno, Vanessa Nogueira, and Kaz Kasal
- GUESTS PRESENT:** Lance Sewell / Orlando Health South Lake Hospital Chris Carmody, Heather Ramos / GrayRobinson; Tameka Austin / Florida Commerce

Agenda Item	Topic	Action Item / Follow Up Item
1.	<b>Welcome</b> <ul style="list-style-type: none"><li>Ms. Olson, Board Chair on behalf of Richard Sweat, Board Chair, called meeting to order at 9:00 am and welcomed attendees.</li></ul> <b>Host Welcome</b> <ul style="list-style-type: none"><li>Mr. Sewell, President of Orlando Health South Lake Hospital, welcomed attendees. Mr. Sewell provided overview of the hospital and the National Training Center.</li></ul>	
2.	<b>Roll Call / Establishment of Quorum</b> <ul style="list-style-type: none"><li>Ms. Kasal, Executive Board Coordinator, reported a quorum present.</li></ul>	
3.	<b>Public Comment</b> <ul style="list-style-type: none"><li>None offered.</li></ul>	
4.	<b>Spotlight Story</b> <ul style="list-style-type: none"><li>Ms. Ronokarijo, Vice President of Workforce Operations, introduced CSCF Participant, Yazaira, via video. In the video, Yazaira relayed how CareerSource Central Florida (CSCF) guided her in her job search and career growth which included equipping her with strong resume and helping her in completing the license process. Yazaira now works as a medical assistant at Orlando Health, with an overall goal of completing the nurse practioner program</li></ul>	
5.	<b>Board Recognition</b> <ul style="list-style-type: none"><li>The Board recognized departing board members: Dr. Maria Vazquez, Mr. Ben Larry and Mr. Joseph Battista for their service on the board.</li></ul>	

	<ul style="list-style-type: none"> <li>The board also welcomed new board member Mr. Robert Bixler, Chief of Staff, Orange County Public Schools.</li> </ul>	
6.	<p><b>Consent Agenda</b></p> <ul style="list-style-type: none"> <li>Ms. Olson asked the Board if any items on consent agenda, as listed below (attachments), should be moved off for further discussion: <ul style="list-style-type: none"> <li>Draft Minutes of 6/12/25 Board Meeting</li> <li>Nonrenewal Seminole Office (<i>Finance</i>)</li> <li>Nonrenewal Southeast Orange Office (<i>Finance</i>)</li> <li>Budget Adjustment (<i>Finance</i>)</li> </ul> </li> </ul>	<p><b>Mr. Hayward made a motion to approve all items on the consent agenda. Mr. Nakagawa seconded; motion passed unanimously.</b></p>

7.	<p><b>Information / Discussion / Action Items</b></p> <p><u>Chair's Report:</u></p> <ul style="list-style-type: none"> <li>Ms. Olson relayed the following: <ul style="list-style-type: none"> <li>CSCF's "Rise &amp; Thrive" inaugural event was a great success. Ms. Olson thanked those board members who attended.</li> <li>Reminder to complete refresher training, which a link to the training was emailed to the board on 9/17/25.</li> <li>Read the Board Source issue coming out this afternoon. Upcoming events will be listed in the issue that board members can attend.</li> </ul> </li> </ul> <p><u>President's Report (attachment)</u></p> <ul style="list-style-type: none"> <li>Ms. Nabors, President/CEO, provided following highlights from the President's Report (attachment): <ul style="list-style-type: none"> <li>CSCF received A rating from CareerSource Florida for exceeding the majority of measures across every program.</li> <li>CSCF's Year-End Scorecard: 7/1/2024 thru 6/30/2025.</li> <li>Reviewed various CSCF Board and staff achievements.</li> <li>Seminole County recognized Mr. Sweat with proclamation for leadership on CSCF Board and in workforce development.</li> <li>Legislative update – advocating for workforce development continues.</li> <li>Media highlights.</li> </ul> </li> </ul> <p><u>Finance Report</u></p> <ul style="list-style-type: none"> <li>Mr. Alvarez, CFO, reviewed Year-End Financials: 7/1/2024 thru 6/30/2025 (attachment). Closed the year nearly on track.</li> </ul> <p><u>Committee Reports</u></p> <p><u>Executive:</u></p> <ul style="list-style-type: none"> <li>Ms. Olson, Executive Committee Chair, reported Committee met on 9/17/25 and reviewed: <ul style="list-style-type: none"> <li>Charter and current Committee Structure</li> <li>Items as listed under today's Consent Agenda</li> <li>President and Committees' Report Outs</li> <li>Today's Board Agenda</li> </ul> </li> </ul> <p><u>Audit</u></p> <ul style="list-style-type: none"> <li>Mr. Walton, Audit Committee Chair, stated the Committee met jointly with the Finance Committee on 9/3/25. The Committee reviewed its charter and concurred no updates were needed. Committee also reviewed audit planning to be performed by auditors Cherry Bekaert.</li> </ul>	
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	<p><u>Facilities Ad Hoc</u></p> <ul style="list-style-type: none"> <li>Mr. Walton, Facilities Ad Hoc Committee Chair, stated Committee met on 8/25/25 at CSCF's Community Hub located in Valencia College East Campus and: <ul style="list-style-type: none"> <li>Reviewed updated layouts and lease terms of Administration office, Community Hubs at Valencia College and Seminole State College, and Lake-Sumter State College.</li> <li>Reviewed overall lease schedules of all CSCF's locations. CSCF anticipates an overall savings of more than \$800,000, and to have 6 Community Hubs operational by 6/30/26.</li> <li>Approved to forward to Board, which Board approved under today's Consent Agenda, to allow staff to notify landlords of intent not to renew at CSCF's Southeast Orange and Seminole locations.</li> </ul> </li> </ul> <p><u>Career Services</u></p> <ul style="list-style-type: none"> <li>Mr. Albu, Career Services Committee Chair, stated Career Services Committee met on 7/24/25 and 9/11/25: <ul style="list-style-type: none"> <li><u>At 7/24/25 meeting:</u> <ul style="list-style-type: none"> <li>Committee reviewed process and timeline of procurements on Summer Youth 2026 for Engage and Explore programs, Workforce Transition program, and One-Stop Operator.</li> </ul> </li> <li><u>At 9/11/25 meeting:</u> <ul style="list-style-type: none"> <li>Reviewed Committee's charter and concurred no updates needed.</li> <li>Approved the above-mentioned procurements from 7/24 meeting, which Board will make final approval at its 9/25/25 meeting.</li> <li>Procurements for Board vote: <p>Summer Youth Program 2026:</p> <ol style="list-style-type: none"> <li>Engage: <p>Reviewed procurement on the 2026 Summer Youth Engage Program (attachment) of which nine proposals were received, but eight qualified for scoring. Career Services Committee recommends selection of top seven proposers: Central Florida Urban League, Valencia College, Renacer en Vida Nueva, Inc., Tech Sassy Girlz, Seminole State College, Osceola Technical College and My True Prosperity.</p> </li> </ol> </li> </ul> </li> </ul> </li> </ul>	<p><b>Mr. Ushkowitz made a motion for the Board to approve top seven proposers as presented for the Summer Youth Program 2026 – Engage, with a budget up to \$700,000. In addition, the related party contract with CareerSource</b></p>
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	<p>Related Party Contract:</p> <p>Dr. Kostenbauder, Seminole State College, indicated before the meeting that she had a conflict of interest and needed to abstain from discussion and voting. Staff presented a Related Party Contract with CareerSource Central Florida and Seminole State College in the amount of \$_____ annually.</p> <p>A copy of the Board meeting and committee meeting minutes that documents the discussion and approval of the Related Party Contract (including the name of the contractor and the value of the contract) will be forwarded to Florida Commerce.</p> <p>2. Explore:</p> <p>Reviewed procurement on the 2026 Summer Youth Explore Program (attachment) of which six proposals were received. Career Services Committee recommends selection of all six proposers: University of Central Florida, Valencia College, Orange County Public Schools, Lake Technical College, Seminole State College, and Osceola Technical College, as this will provide good coverage across CSCF's region.</p> <p>Related Party Contracts:</p> <p>Dr. Kostenbauder, Seminole State College, indicated before the meeting that she had a conflict of interest and needed to abstain from discussion and voting. Staff presented a Related Party Contract with CareerSource Central Florida and Seminole State College in the amount of \$_____ annually.</p> <p>Mr. Bixler, Orange County Public Schools, indicated before the meeting that he had a conflict of interest and needed to abstain from discussion and voting. Staff presented a Related Party Contract with CareerSource Central Florida and Orange County Public Schools in the amount of \$_____ annually.</p>	<p><b>Central Florida and Seminole State College in the amount not to exceed \$_____ annually. Mr. Walton seconded, with Dr. Kostenbauder abstaining; motion passed.</b></p> <p><b>The related party contract will be sent to Florida Commerce for approval</b></p> <p><b>Yeas: 21</b> <b>Nays: 0</b> <b>Abstentions: 1</b></p> <p><b>Mr. Ferguson made a motion for the Board to approve all six proposers, as presented, for the Summer Youth Program 2026 – Explore, with a budget up to \$700,000. In addition, for the the related party contract with CareerSource Central Florida and Seminole State College &amp; Orange County Public Schools regarding Summer Youth Program 2026 – Explore in the amount not to exceed \$_____ annually. Ms. Ford seconded, with Dr. Kostenbauder and Mr. Bixler abstaining; motion passed.</b></p> <p><b>The related party contract will be sent to Florida Commerce for approval</b></p>
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	<p>A copy of the Board meeting and committee meeting minutes that documents the discussion and approval of the Related Party Contract (including the name of the contractor and the value of the contract) will be forwarded to Florida Commerce.</p> <p>Work Transition Program:</p> <p>Reviewed procurement on the Welfare Transition Program of which two proposals were received. Career Services Committee recommends selection of top-ranked proposer, Goodwill Industries of Central Florida.</p> <p>One-Stop Operator:</p> <p>Reviewed procurement, of which CareerSource Research Coast (CSRC) acted as procurement agent, on the 2026 One-Stop Operator (attachment). One proposal was received, submitted by CSCF itself. The CSRC Review Team evaluated the proposal against established criteria and CSCF's submission received a 91 out of 100 (100 being the highest). CSRC's recommends CSCF to serve as its own One-Stop Operator.</p> <p>Ms. Nabors stated that since CSCF's Operations department delivers services and to safeguard from any conflicts of interest, another CSCF department will be assigned and function as the one-stop operator.</p> <p><u>Community Engagement</u></p> <ul style="list-style-type: none"> <li>Ms. LeWinter, Community Engagement Committee Chair, stated committee met on 8/28/25 and: <ul style="list-style-type: none"> <li>Welcomed new committee member Dan Holste with Orange County Government.</li> <li>Reviewed Committee's charter and made one non-substantive edit.</li> </ul> </li> </ul>	<p><b>Yeas: 20</b>  <b>Nays: 0</b>  <b>Abstentions: 2</b></p> <p><b>Mr. Sprinkle made a motion for Board to approve for staff to proceed with negotiations with Goodwill Industries of Central Florida to deliver the PY 2026 Welfare Transition Program, with a budget up to \$750,000. Mr. Walton seconded; motion passed unanimously.</b></p> <p><b>Mr. Hayward made a motion for Board to approve endorsement of CSCF's designation as its own One-Stop Operator with a budget not to exceed \$20,000. Mr. Donnelly seconded; motion passed unanimously.</b></p>
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- Received an update on CSCF's website refresh. Committee to review a couple design concepts in side-by-side comparison and provide feedback.
- Reviewed CSCF's goal of "storytelling" success stories as strategy for public messaging.
- Discussed what to capture in the formation of the "Customer Satisfaction and Business Survey"
- Received an overview of the "Rise & Thrive" event.

#### Finance Committee

- Mr. Walton, Finance Committee Vice Chair, reported the Committee met jointly with the Audit Committee on 9/3/24 and reviewed:
  - Reviewed Committee's charter and concurred no updates needed.
  - Year-end results for FY 2024-2025
  - Approved, for Board's final approval, a budget adjustment reallocation of \$500 from Training to Salaries/Benefits category. This will be approved under 9/25/25 Board's consent agenda.
  - Reviewed summaries of procurements as reported out under Career Services Committee.
  - Received update from Facilities Ad Hoc Committee to include action item to nonrenew CSCF's Southeast Orange and Seminole locations. Finance Committee approved to forward this action to Board for final approval at its 9/25/25 meeting.

#### Governance

- Mr. Sprinkle, Governance Committee Chair, stated Committee met on 8/14/25 and reviewed:
  - Reviewed Committee's charter and made one non-substantive edit.
  - Reviewed Board Engagement results for 7/1/2024 thru 6/30/2025. Exceeded annual goal in all categories: Participate, Demonstrate and Contribute, and the first time reaching 100% under Contribute.
  - Mr. Nguyen, provided an update on the CSCF's top risks and proactive measures being taken to mitigate risks.

#### Revenue Diversity and New Markets

Nothing to report; this committee will meet on 10/21/25.



8.	<b>Insight</b> Legislative Upate <ul style="list-style-type: none"> <li>Mr. Carmody, GrayRobinson, presented an update on legislative activities (attachment).</li> </ul>	
9.	<b>Other Business</b> None offered.	
10.	<b>Adjournment</b> Meeting adjourned at 10:15 am.	

Respectfully submitted,

Kaz Kasal  
Executive Board Coordinator





# BOARD OF DIRECTORS MEETING

CareerSource Central Florida | 9/25/25

[CareerSourceCentralFlorida.com](https://www.CareerSourceCentralFlorida.com)

ISHMENT  
BEGINS WITH A DREAM.





# 9/25/25 BOARD OF DIRECTORS MEETING DETAILS

Meeting Details

Meeting Agenda

Welcome

Roll Call

Public Comment

Spotlight Story

Board Recognition

Consent Agenda

Information/  
Discussion/  
Action Items

Insight

Other Business

Adjournment

Appendix

What: CSCF Board of Directors Meeting

When: Thursday, September 25, 2025  
9:00 a.m. – 10:30 a.m.

Where: National Training Center (*Orlando Health/South Lake Hospital Campus*)  
1935 Don Wickham Drive, Clermont, FL 34711

or

Virtual Option via Zoom:

Link: <https://careersourcecf.zoom.us/j/88500524416?pwd=d4g3QBkObSIImnyWRKbxNuFzKSefbJI.1>

Dial In: 1 (929) 205-6099 / Meeting ID: 885 0052 4416 / Passcode: 556780

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9/25/25 BOARD OF DIRECTORS MEETING AGENDA

<div>Meeting Details</div> <div>Meeting Agenda</div> <div>Welcome</div> <div>Roll Call</div> <div>Public Comment</div> <div>Spotlight Story</div> <div>Board Recognition</div> <div>Consent Agenda</div> <div>Information/ Discussion/ Action Items</div> <div>Insight</div> <div>Other Business</div> <div>Adjournment</div> <div>Appendix</div>	Agenda Item #	Topic	Presenter	Action Item
	7.	Committee Reports Continued...  6) Finance (met on 9/3/25 w/Audit) 7) Governance (met on 8/14/25) 8) Revenue Diversity & New Markets (meeting on 10/21/25)	Eric Ushkowitz David Sprinkle John Gill	
	8.	Insight  A. Legislative Update	Chris Carmody Shareholder GrayRobinson	
	9.	Other Business		
	10.	Adjournment		
	<div>Upcoming Meetings:</div> <div><div>10/21/25</div><div>Revenue Diversity &amp; New Markets</div><div>3:00 p.m. – 4:30 p.m.</div></div> <div><div>10/29/25</div><div>Governance</div><div>3:00 p.m. – 4:30 p.m.</div></div> <div><div>11/13/25</div><div>Community Engagement</div><div>3:00 p.m. – 4:30 p.m.</div></div> <div><div>11/20/25</div><div>Career Services</div><div>3:00 p.m. - 4:30 p.m.</div></div> <div><div>12/4/25</div><div>Executive</div><div>2:00 p.m. – 3:30 p.m.</div></div> <div><div>12/11/25</div><div>Consortium &amp; Board</div><div>3:00 p.m. – 5:00 p.m.</div></div>			



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**WELCOME**



The background of the image is a close-up, slightly blurred view of the American flag, showing the stars and stripes in a wavy pattern. The text is overlaid on this background.

**I pledge allegiance  
to the flag  
of the United States of America  
And to the Republic  
for which it stands,  
One nation, under God,  
indivisible,  
With liberty and justice for all**



# **SPECIAL THANKS TO OUR HOST**

**ORLANDO HEALTH®**

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 **National  
Training Center**



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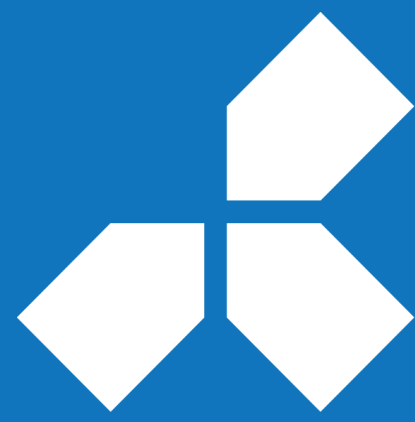
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# ROLL CALL / ESTABLISHMENT OF QUORUM



CareerSource  
CENTRAL FLORIDA

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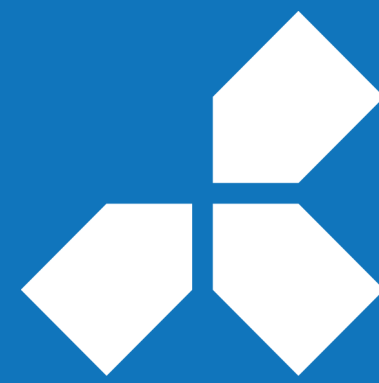
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# PUBLIC COMMENT



CareerSource  
CENTRAL FLORIDA

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# CSCF SPOTLIGHT STORY





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# BOARD RECOGNITION





# **OUTSTANDING SERVICE RECOGNITION**



**DR. MARIA VAZQUEZ**  
**CAREERSOURCE CENTRAL FLORIDA**  
**BOARD OF DIRECTORS**  
**12/16/21 - 6/30/25**



# **OUTSTANDING SERVICE RECOGNITION**



**JOSEPH BATTISTA**  
**CAREERSOURCE CENTRAL FLORIDA**  
**BOARD OF DIRECTORS**  
**7/1/22 - 10/3/25**



# **OUTSTANDING SERVICE RECOGNITION**



**BEN LARRY**  
**CAREERSOURCE CENTRAL FLORIDA**  
**BOARD OF DIRECTORS**  
**7/1/22 - 9/ /25**





# **CAREERSOURCE CENTRAL FLORIDA BOARD WELCOMES**



**ROBERT BIXLER**  
**CAREERSOURCE CENTRAL FLORIDA**  
**BOARD OF DIRECTORS**  
**7/1/25 - 6/30/28**



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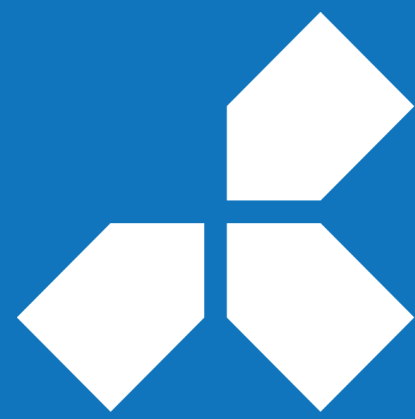
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# CONSENT AGENDA

- [6/12/25 Board Minutes](#)
- Nonrenewal Seminole (*Finance*)
- Nonrenewal Southeast Orange (*Finance*)
- [Budget Adjustment \(\*Finance\*\)](#)

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CareerSource  
CENTRAL FLORIDA

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# INFORMATION / DISCUSSION / ACTION ITEMS

# CHAIR'S REPORT







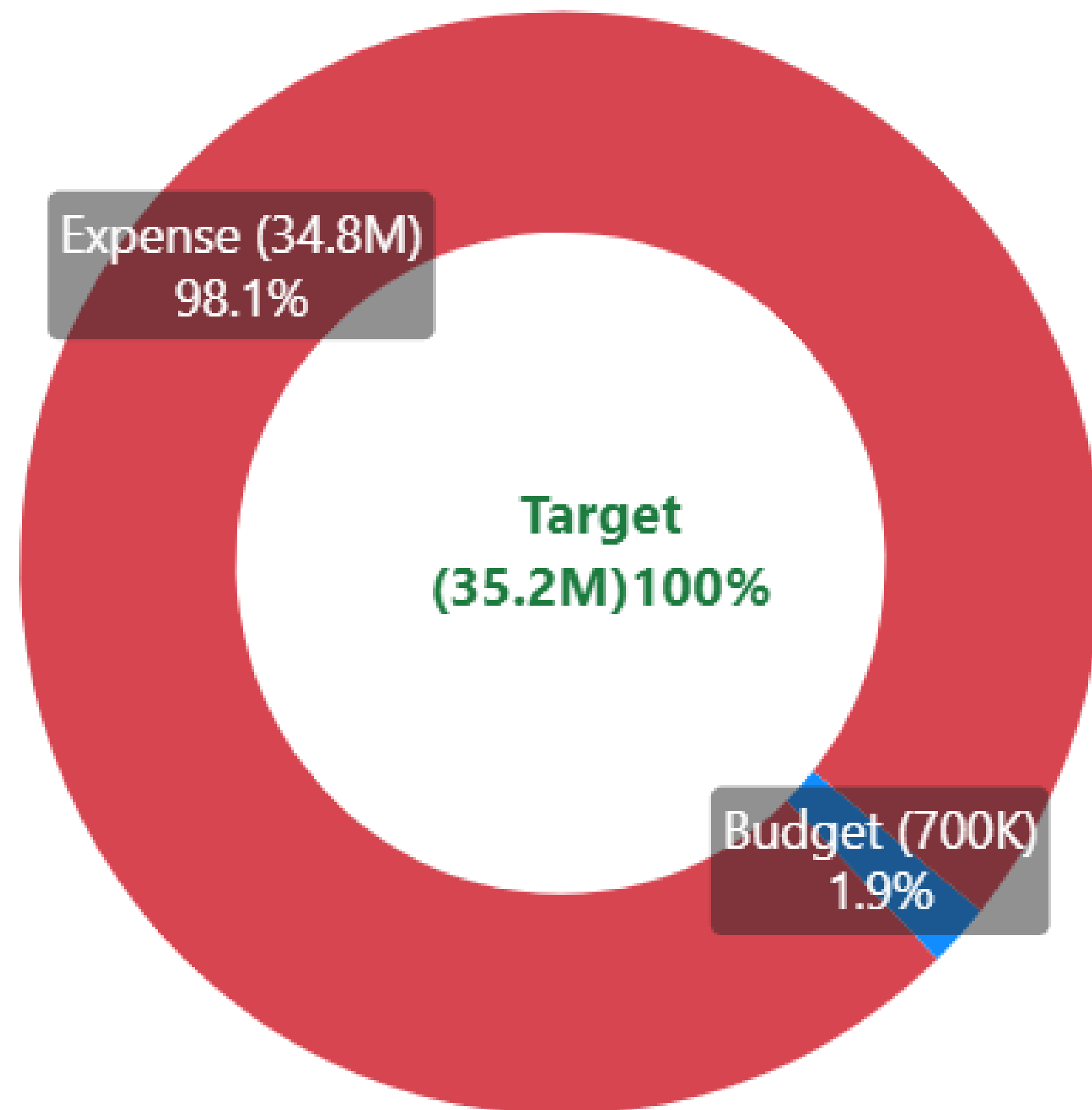
# **FINANCE REPORT**

**YEAR-END RESULTS**

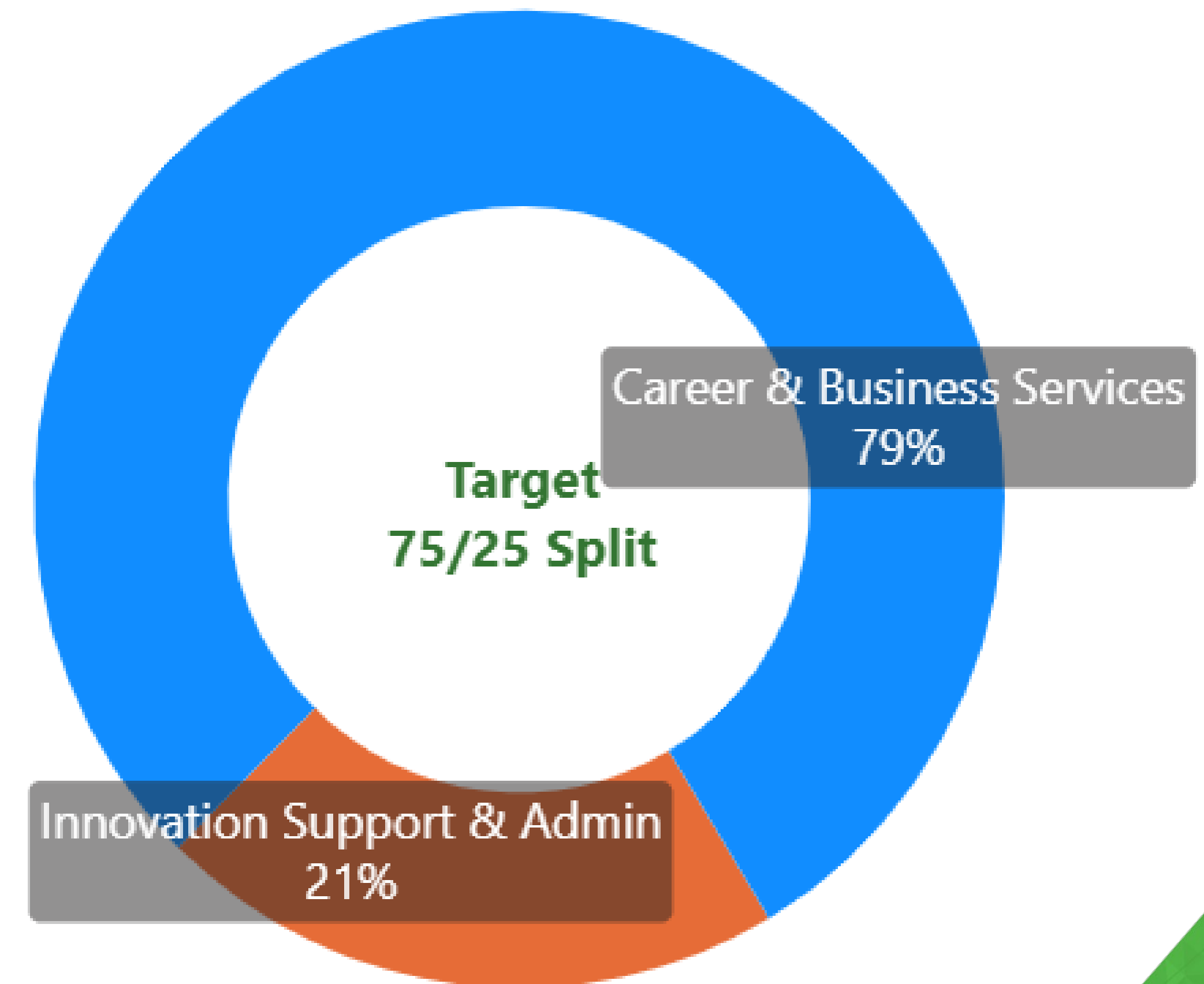
**FY 7/1/24 THRU 6/30/25**

# BUDGET VS ACTUAL

## BUDGET VS ACTUAL EXPENSES

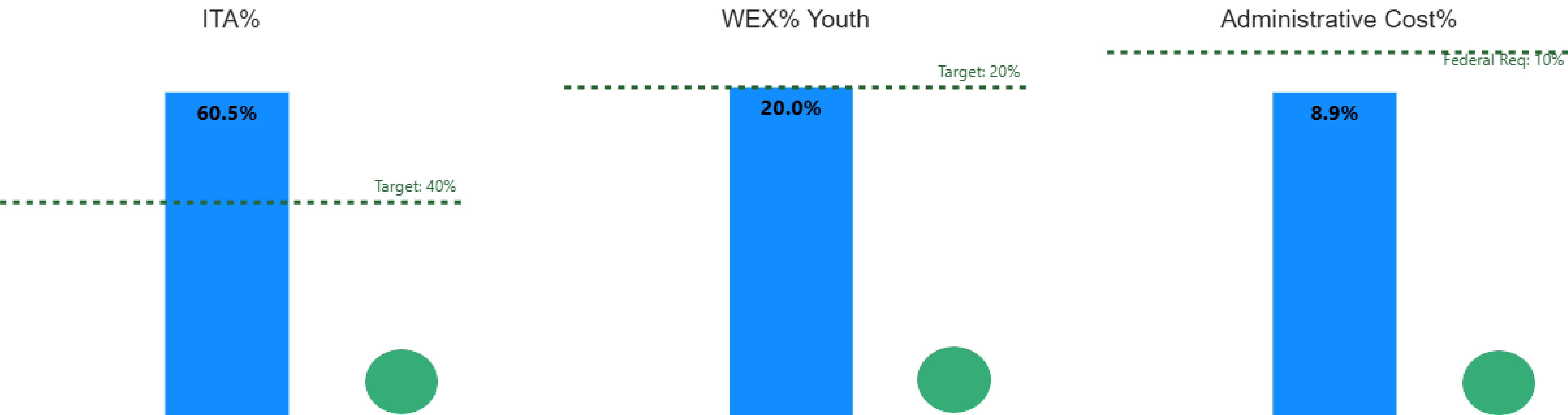


## BUDGET OPERATIONS/SUPPORT

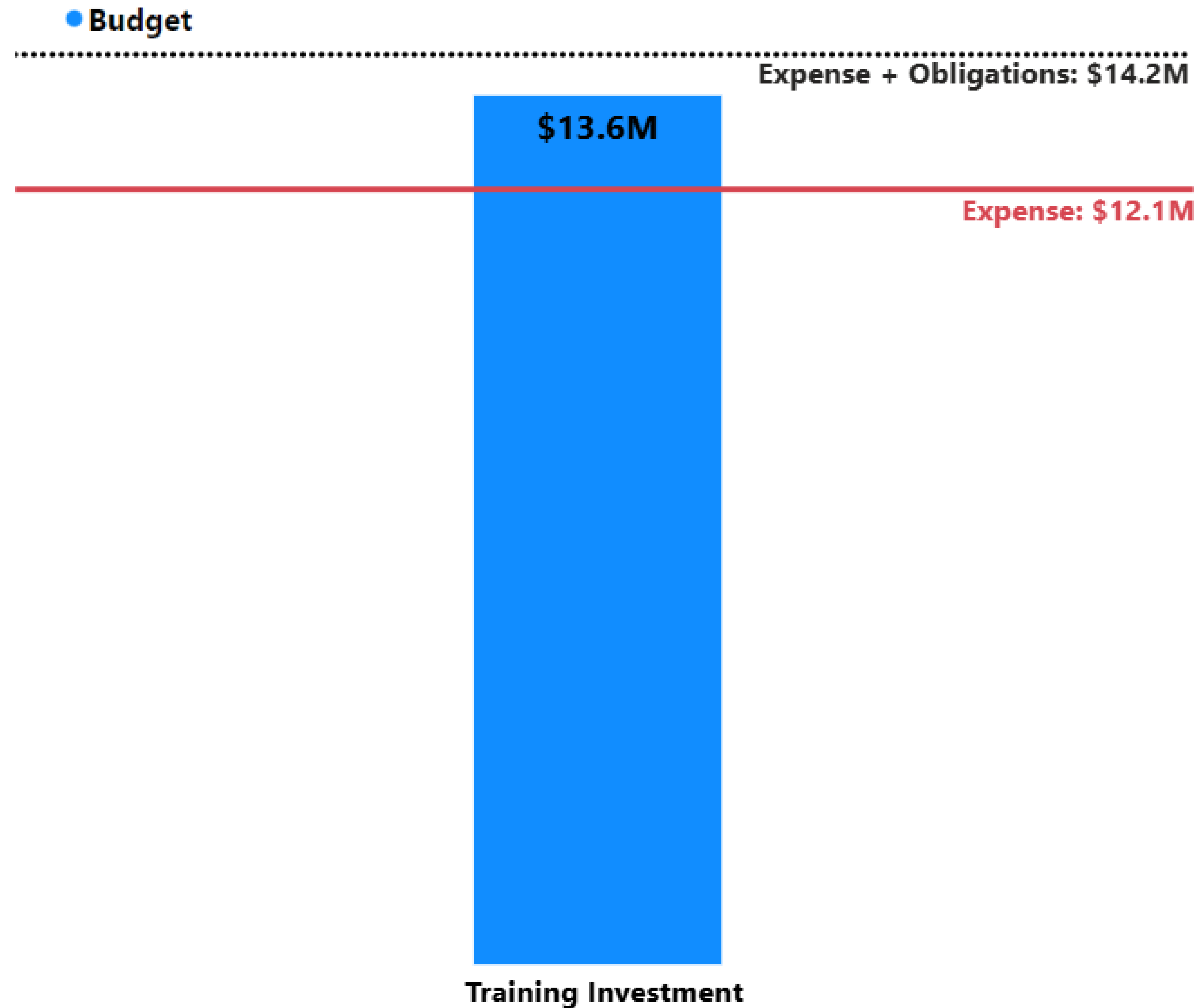




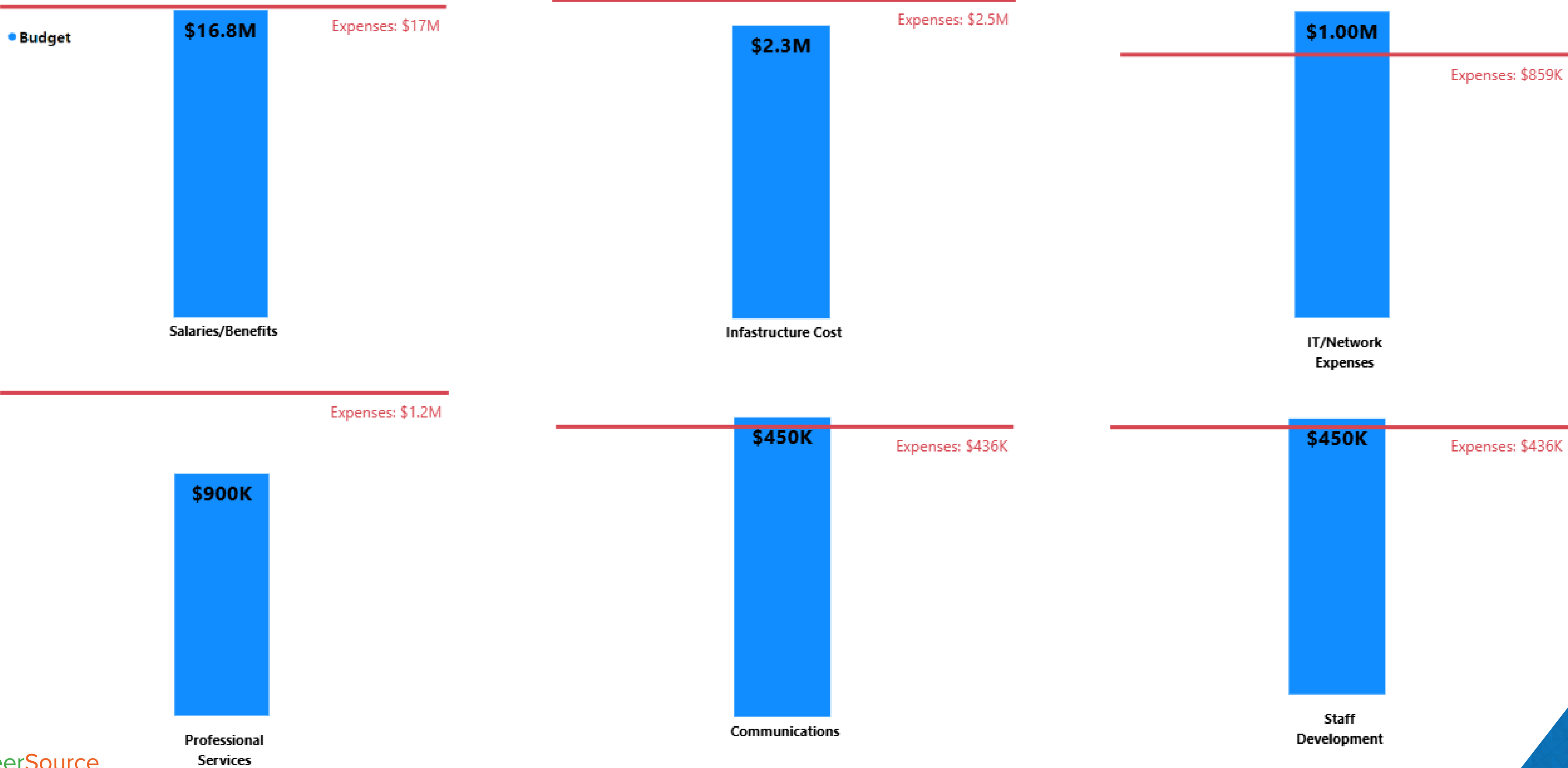
# BUDGET FEDERAL/STATE REQUIREMENTS



# BUDGET VS ACTUAL BY EXPENDITURE CATEGORY



# BUDGET VS ACTUAL BY EXPENDITURE CATEGORY





# CareerSource Central Florida

## Current Year Budget and 2 yr Expenditure Comparison

### As of 06/30/25

	CY	PY	\$	%
Funding Sources	Revenue	Revenue	Difference	Difference
Carry In Funds From FY 2023- 24	11,955,576	16,960,163	(5,004,587)	
FY 24 - 25 Award	31,798,944	30,039,920	1,759,024	
Award Total - Available Funds	43,754,520	47,000,083	(3,245,563)	
LESS planned Carryover For FY 25 - 26	(8,279,520)	(10,525,083)	2,245,563	
Total Available Funds Budgeted	35,475,000	36,475,000	(1,000,000)	-2.7%

	Budget	CY Expenditures	PY Expenditures	\$ Difference	% Difference
Salaries/Benefits	16,815,000	17,018,539	19,540,560	(2,522,021)	-12.9%
Career & Youth Services	13,560,000	12,132,620	11,154,277	978,343	8.8%
Professional Fees	900,000	1,270,736	1,043,061	227,675	21.8%
Outreach	450,000	435,782	324,919	110,863	34.1%
Infrastructure/Maintenance & Related Cost	2,300,000	2,559,008	2,487,276	71,732	2.9%
IT Cost/Network Expenses	1,000,000	859,140	1,254,794	(395,654)	-31.5%
Staff Development & Capacity Building	450,000	540,296	512,456	27,840	5.4%
TOTAL EXPENDITURES	35,475,000	34,816,122	36,317,343	(1,501,220)	-4.1%

	BUDGET	CY ACTUAL	PY ACTUAL
ITA % (Adult DW)	40.0%	60.5%	42.7%
ITA% (Youth)	20.0%	20.0%	19.0%
ADMINISTRATIVE COST %	10.0%	8.9%	10.0%

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# REPORTS BY COMMITTEE CHAIR

**Executive**

**Sheri Olson**

**Audit**

**Matt Walton**

**Facilities Ad Hoc**

**Matt Walton**

**Career Services**

**Andrew Albu**

**Community Engagement**

**Lindsey LeWinter**

**Finance**

**Eric Ushkowitz**

**Governance**

**David Sprinkle**

**Revenue Diversity & New Markets**

**John Gill**

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## MEMORANDUM

**To:** CareerSource Central Florida Board of Directions  
**From:** Career Services Committee  
**Date:** September 25, 2025  
**Subject:** 2026 Summer Youth Programs RFP – Engage Program Recommendation

---

CareerSource Central Florida (CSCF) issued a Request for Proposal (RFP) to secure partners for delivery of the **2026 Summer Youth Program** across Sumter, Lake, Orange, Osceola, and Seminole counties. The Engage Program leverages summer break to provide youth with career experiences in high-demand industries.

### Program Highlights

- Serve no fewer than **1,500 participants** in 2026
- Supported by a **\$700,000 budget** for Engage Program activities
- Three age- and interest-based tracks for flexible career exploration

### RFP Process

- **Nine proposals** were received; eight qualified for scoring
- Evaluation conducted by Review Team with averaged scores and rankings

### Top Proposers by Score

1. Central Florida Urban League – 88.0
2. Valencia College – 83.3
3. Renacer en Vida Nueva, Inc. – 81.3
4. Tech Sassy Girlz – 81.0
5. Seminole State College – 80.7
6. Osceola Technical College – 75.7
7. My True Prosperity – 75.3

### Action:

The Career Services Committee recommends for CSCF Board to approve authorizing staff to negotiate with the **top seven proposers** listed above to ensure robust delivery of the 2026 Engage Program, budget of up to \$700K.

*Approved:*

*Career Services Committee: 9/11/25*





## MEMORANDUM

**To:** CareerSource Central Florida Board of Directions  
**From:** Career Services Committee  
**Date:** September 25, 2025  
**Subject:** 2026 Summer Youth Programs RFP – Explore Program Recommendation

---

CareerSource Central Florida (CSCF) issued a Request for Proposal (RFP) to identify partners for delivery of the **2026 Summer Youth Program – Explore Track** across Sumter, Lake, Orange, Osceola, and Seminole counties. The Explore Program provides career exploration experiences to inspire and prepare youth, particularly those facing barriers, while also developing a future talent pipeline for local employers.

### Program Overview

- Serve no fewer than **1,500 youth participants** in 2026
- Supported by a **\$700,000 budget for Explore programming**
- Focus on career awareness and exploration activities

### RFP Process

- **6 proposals received** from Valencia College, Lake Technical College, University of Central Florida, Seminole State College, Orange County Public Schools, and Osceola Technical College
- All proposals were evaluated, scored, and ranked by the Review Team

### Evaluation Results (Top Scores):

- University of Central Florida – 94.0 (Rank #1)
- Valencia College – 91.7 (Rank #2)
- Orange County Public Schools – 90.0 (Rank #3)
- Lake Technical College – 83.7 (Rank #4)
- Seminole State College – 82.7 (Rank #5)
- Osceola Technical College – 82.3 (Rank #6)

### Action

The Career Services Committee recommends the CSCF Board to approve authorizing staff to negotiate with **all six proposers** to deliver the 2026 Explore Program, budget of up to \$700K.

*Approved:*  
*Career Services Committee: 9/11/25*



## MEMORANDUM

**To:** CareerSource Central Florida Board of Directors  
**From:** Career Services Committee  
**Date:** 9/25/2025  
**Subject:** Request for Approval to Negotiate – Welfare Transition Program RFP (PY26-WTP-RFP)

CareerSource Central Florida (CSCF) recently issued a Request for Proposal (RFP) to solicit proposals from qualified organizations capable of delivering comprehensive employment and support services under the Welfare Transition Program (WTP). This initiative is designed to assist individuals facing barriers to employment in achieving long-term self-sufficiency through structured work opportunities, individualized coaching, and skill-building resources.

Advance notification of the RFP was provided to six (6) organizations identified as capable WTP providers, and the opportunity was also posted on the CSCF website. Two proposals were received:

1. **Goodwill Industries of Central Florida**
2. **Central Florida Urban League**

The Review Team conducted a thorough evaluation of both proposals, with each member submitting individual scores that were averaged to determine final rankings. The results are as follows:

Proposer	Average Points	Rank
Goodwill Industries of Central Florida	91.7	1
Central Florida Urban League	71.0	2

Based on the scoring and team review, the Review Team has recommended entering into negotiations with **Goodwill Industries of Central Florida**, the top-ranked proposer.

### Action:

The Career Services Committee recommends the CSCF Board to approve authorizing staff to negotiate with Goodwill Industries of Central Florida to deliver the PY26 Welfare Transition Program, budget of up to \$750K.

*Approved:*  
*Career Services Committee: 9/11/25*





## MEMORANDUM

**To:** CareerSource Central Florida Board of Directors  
**From:** Career Services Committee  
**Date:** 9/25/25  
**Subject:** Action Required – Designation of CareerSource Central Florida as One-Stop Operator

---

### Background

In accordance with the Workforce Innovation and Opportunity Act (WIOA) Sec. 121(d)(2)(A), each Local Workforce Development Board (LWDB) must competitively procure and designate a One-Stop Operator (OSO). Florida Commerce and CareerSource Florida policies reinforce this requirement to ensure compliance, transparency, and effective coordination of the local career center system.

CareerSource Central Florida (CSCF), through CareerSource Research Coast (CSRC) acting as procurement agent, issued a Request for Proposal (RFP) for One-Stop Operator services. The RFP was distributed to five organizations and publicly posted. CSRC received one proposal—submitted by CSCF itself.

The CSRC Review Team evaluated the proposal against established criteria. CSCF's submission received an average score of **91/100**, ranking as the top (and only) respondent. CSRC has formally recommended CSCF to serve as its own One-Stop Operator, with a proposed budget of **\$20,000**.

---

### State Policy Compliance

Florida Commerce and CareerSource Florida policy allow an LWDB to serve as its own OSO if:

- A competitive procurement process is documented.
  - The LWDB formally approves the designation.
  - Oversight and service delivery duties remain clearly separated.
  - The OSO is reviewed annually for performance and compliance.
-



### Action

The Career Services Committee recommends the CSCF Board approve to endorse CSCF's designation as its own One-Stop Operator with a budget not to exceed \$20,000.

---

### Next Steps

Upon CSCF Board approval, CSCF will notify Florida Commerce and CareerSource Florida of the designation and maintain compliance documentation for monitoring purposes.

---

### Attachments:

- CSRC Recommendation Letter (August 28, 2025)
- Internal RFP Evaluation Memo (September 2, 2025)

*Approved:*

*Career Services Committee: 9/11/25*



[careersourcerc.com](http://careersourcerc.com)

August 28, 2025

Dear Proposer:

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

CareerSource Central Florida (CSCFL) and your proposal passed technical review and was the only proposal received. Based on this review, CSRC is making the recommendation to the Board of Directors to have CSCFL serve as the OSO for the Local Workforce Development Area and LWDB12.

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

Sincerely,

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

Brian K. Bauer  
President/CEO

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

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## INTERNAL MEMORANDUM

To: Leo Alvarez, Chief Financial Officer - Gina Ronokarijo, Vice President of Workforce Operations  
From: Peter Puterbaugh, Senior Manager of Procurement & Contracts  
Subject: REQUEST FOR PROPOSAL FOR CAREERSOURCE CENTRAL FLORIDA – ONE-STOP OPERATOR -  
RFP NUMBER RFP-CSCF-25-OSO-01- Review Team Results and Recommendation  
Date: 9/2/2025

### Background

In accordance with the Workforce Innovation and Opportunity Act (WIOA), CareerSource Central Florida (CSCF) initiated a procurement process to secure One-Stop Operator Services. WIOA envisions a workforce development system that is comprehensive, integrated, and streamlined to better align with the needs of business and to support local economic growth.

To fulfill this requirement, CareerSource Research Coast (CSRC), acting on behalf of CSCF, developed and released a Request for Proposal (RFP). The RFP was disseminated directly to five (5) organizations identified as capable providers of One-Stop Operator services and was also posted publicly on the CSCF website.

### Proposal Received

CSRC received one (1) proposal in response to the RFP:

1. **CareerSource Central Florida**

### Evaluation Process

The CSRC Review Team conducted a comprehensive evaluation of the submitted proposal. Each member independently scored the proposal based on established evaluation criteria. The team then convened to review and discuss the results.

The individual scores were averaged to produce the final recommended ratings and rankings. The results of this evaluation are summarized in the attached scoring matrix.

SUMMARY OF EVALUATED AVERAGE POINTS & RANK BY PROPOSER	
<i>Proposer Name</i>	
CareerSource Central Florida	
91	
1	

The CSRC Review Team is recommending to the CSCF Board of Directors that CSCF serve as the CSCF One-Stop Operator with a budget of \$20K.

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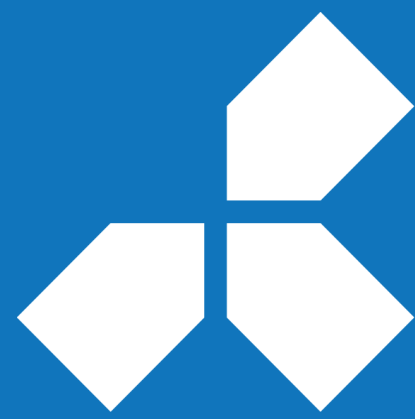
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# INSIGHT



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# OTHER BUSINESS



# **REMINDER:**

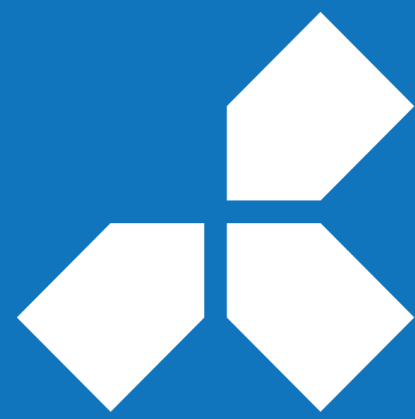
**NEXT BOARD MEETING SCHEDULED FOR:**

**WEDNESDAY, DECEMBER 11, 2025**

**AT**

**TO BE DETERMINED**

***UPDATED CALENDAR INVITE WILL BE SENT OUT***



CareerSource  
CENTRAL FLORIDA

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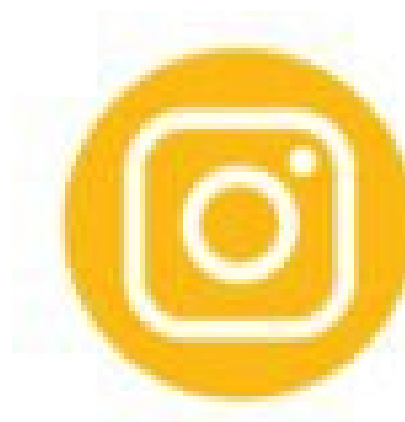
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or in person by appointment, in your place of business or at one of our Career Centers.





# THANK YOU

Phone: 800.757.4598  
Website: [www.CareerSourceCentralFlorida.com](http://www.CareerSourceCentralFlorida.com)

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# APPENDIX

- A. 6/12/25 BOARD MEETING MINUTES *(CONSENT AGENDA ITEM)***
- B. NONRENEWAL SEMINOLE *(CONSENT AGENDA ITEM)***
- C. NONRENEWAL SOUTHEAST ORANGE *(CONSENT AGENDA ITEM)***
- D. BUDGET ADJUSTMENT *(CONSENT AGENDA ITEM)***



DRAFT  
Board of Directors Meeting  
Thursday, June 12, 2025 9:00 a.m.  
MINUTES

AGENDA ITEM 6 A

**MEMBERS PRESENT:** Sheri Olson, Joe Battista, Wendy Brandon, Gui Cunha, Sean Donnelly, Casey Ferguson, Wendy Ford, Tanisha Nunn Gary, John Gill, Mark Havard, Jeff Hayward, Shawn Hindle, Lindsey LeWinter, Nicole Martz, Catherine McManus, Snak Nakagawa, Gaby Ortigoni, Chris Pascal, Brinkley Ruffin, Amy Santorelli, Jonathan Schaefer, Trey Simpkins, Stella Siracuza, Michelle Sperzel, Eric Ushkowitz, Matt Walton, and Richard Watford

**MEMBERS ABSENT:** Andrew Albu, Sharon Arroyo, Kristin Gray, Molly Kostenbauder, Ben Larry, David Sprinkle, Richard Sweat, DeAnna Thomas, Maria Vazquez, and Kristin Williams

**STAFF PRESENT:** Pam Nabors, Tadar Muhammad, Leo Alvarez, Dyana Burke, Steven Nguyen, Gina Ronokarijo, Kristi Vilardi, Geo Morales, Brian Sparhawk, Sean Masherella, Vince Bruno, Carla Sosa, Vanessa Nogueira, and Kaz Kasal

**GUESTS PRESENT:** Commissioner Peggy Choudhry / Osceola County; Adrienne Johnston / CareerSource Florida; Nate Barnes / CSCF Participant; Kenneth Boggs / Veterans Services Office, Seminole County / Heather Ramos / GrayRobinson; Rachael Kobb, Sharon Smoley / Central Florida Public Affairs

Agenda Item	Topic	Action Item / Follow Up Item
1.	<b>Welcome</b> <ul style="list-style-type: none"> <li>Ms. Olson, Board Vice Chair on behalf of Richard Sweat, Board Chair, called meeting to order at 9:00 am and welcomed attendees.</li> </ul> <b>Roll Call / Establishment of Quorum</b> <ul style="list-style-type: none"> <li>Ms. Kasal, Executive Board Coordinator, reported a quorum present.</li> </ul> <b>Public Comment</b> <ul style="list-style-type: none"> <li>None offered.</li> </ul> <b>Host Welcome</b> <ul style="list-style-type: none"> <li>Mr. Ruffin, CSCF Board Member and Vice President of Talent Acquisition, Universal Orlando, welcomed attendees. Mr. Ruffin provided the internal culture of Universal Orlando and its key values of engagement, enthusiasm and evolvment, as well as the importance cultivating staff and career growth for the long term.</li> </ul>	
2.	<b>Central and East Coast Florida Innovation Alliance (Virtual Connection)</b> CSCF Board connected virtually with the CareerSource Brevard Flagler Volusia Board, to receive an overview on the alliance of these two regional workforce boards. Ms. Adrienne Johnston, President/CEO of CareerSource Florida stated that, as part of the REACH Act, signed by Governor DeSantis, regional workforce boards (RWBs) across the state are to work with a neighboring RWB to share services, reduce barriers, enhance efficiency and maintain local flexibility to improve service delivery to job seekers and businesses.	

	<p>Ms. Marci Murphy, Executive Director, CareerSource Brevard, Flagler Volusia relayed this partnership will provide ability to consistently share processes and strategically plan with shared sectors, i.e. healthcare, advanced manufacturing, construction, hospitality to better service job seeker and business clients.</p> <p>Ms. Pamela Nabors, President/CEO, CSCF, added the advanced manufacturing / semiconductor industry in Neo City, Osceola County, and aerospace industry in Brevard County is a natural alignment which benefits both RWBs with shared talent and tech skills opportunities.</p>	
3.	<p><b>CSCF Spotlight Story</b></p> <ul style="list-style-type: none"> <li>Mr. Muhammad, Chief Operating Officer, introduced CSCF Participant, Nate, and CSCF's Veterans' Career Counselor Mr. Brian Sparhawk.</li> </ul> <p>Nate, veteran, was a helicopter mechanic in the US Army. After recently leaving the military, he struggled to find a civilian career and was homeless with a wife and two small children. Fortunately, Nate connected with Kenneth Boggs at the Seminole County Veterans Services Office. Mr. Boggs then connected Nate to Mr. Brian Sparhawk, CSCF. Through AI technology Mr. Sparhawk was able to match Nate's mechanical experience from the military to a job at Universal Orlando. Nate now works as a Ride Technician at Universal Orlando with great pay. Nate thanked CSCF and Mr. Sparhawk for his assistance in finding a good paying job that is providing for his family. He ended saying "CSCF does make a big difference in people's lives."</p>	
4.	<p><b>Consent Agenda</b></p> <ul style="list-style-type: none"> <li>Ms. Olson asked the Board if any items on consent agenda, as listed below (attachments), should be moved off for further discussion: <ul style="list-style-type: none"> <li>Draft Minutes of 4/15/25 Board Meeting</li> <li>Proposed 2025-2026 Board Meeting Schedule</li> <li>Finance Committee Charter (<i>Finance</i>)</li> <li>Unrestricted Investment Account Broker (<i>Finance</i>)</li> <li>Transfer Authority of WIOA Adult/DW Funding (<i>Finance</i>)</li> <li>Waiver Request of ITA Training Requirements (<i>Finance</i>)</li> <li>Training Provider Recommendations to ETPL List (<i>Career Services</i>)</li> </ul> </li> </ul>	<p><b>Mr. Hayward made a motion to approve all items on the consent agenda. Mr. Walton seconded; motion passed unanimously.</b></p>

5.	<p><b>Information / Discussion / Action Items</b></p> <p><u>Chair's Report:</u></p> <ul style="list-style-type: none"> <li>Ms. Olson relayed the following: <ul style="list-style-type: none"> <li>Be sure to read new Board Source issue coming out this afternoon. There are a few activities listed in the issue that board members can attend and earn participation hours. Reach out to Ms. Kasal if interested in attending.</li> <li>Welcome to also attend Launch Pad: STEM Edition occurring this evening in partnership with J.P. Morgan Chase to raise awareness about STEM careers. Reach out to Ms. Kasal if interested in attending.</li> <li>Reminded the Board to electronically submit their annual Form 1 by 7/1/25.</li> <li>Ms. Olson recognized Mr. Sweat's great service as Board Chair this program year and the previous program year. A special recognition award will be provided to him.</li> </ul> </li> </ul> <p><u>President's Report (attachment)</u></p> <ul style="list-style-type: none"> <li>Ms. Nabors, President/CEO, provided following highlights from the President's Report (attachment). <ul style="list-style-type: none"> <li>CSCF's Scorecard thru 3<sup>rd</sup> quarter: 7/1/2024 thru 3/31/2025.</li> <li>Level Up Orange program updates.</li> <li>Customer Satisfaction – overall satisfaction received: 9 out of 10 (with 10 being the highest).</li> <li>Kicked off partnership with Goodwill on a pilot project with Welfare Transition recipients to make this population aware they can make more money working vs receiving TANF (Temporary Assistance to Needy Families).</li> <li>CSCF received 10+ years of clean audits, no finding from external auditors.</li> <li>CSCF received A+ rating from CareerSource Florida for achieving multiple performance measures.</li> <li>Legislative Update: "Make American Skilled Again" – state legislators reviewing. Stay tuned for further updates.</li> <li>Reviewed various CSCF Board and staff achievements.</li> <li>Update on 2025 Summer Youth Program.</li> </ul> </li> </ul> <p><u>Finance Report</u></p> <ul style="list-style-type: none"> <li>Mr. Alvarez, CFO, reviewed highlights through 3rd quarter, 7/1/24 – 3/31/25 (attachment). On track through 3<sup>rd</sup> quarter with expenditures overall at 7055%; expecting to close the year on track.</li> </ul>	
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	<p><u>Committee Reports</u></p> <p><u>Executive:</u></p> <ul style="list-style-type: none"> <li>Ms. Olson, on behalf of Richard Sweat, Executive Committee Chair, reported Committee met on 5/29/25 and reviewed: <ul style="list-style-type: none"> <li>Chair, President and Committee reports.</li> <li>President &amp; CEO Performance Review – Committee concurred Ms. Nabors’ end of year compensation adjustments of 4% merit, 10% discretionary incentive and a 5% 457 retirement plan discretionary incentive contribution.</li> <li>Reviewed Board agenda.</li> </ul> </li> </ul> <p><u>Audit</u></p> <ul style="list-style-type: none"> <li>Mr. Walton, Audit Committee Chair, stated the FY 2023-2024 990 Report draft was reviewed by Audit and Executive Committees, then approved and filed to IRS, and sent to CSCF Board as an info item.</li> </ul> <p><u>Facilities Ad Hoc</u></p> <ul style="list-style-type: none"> <li>Mr. Walton, Facilities Ad Hoc Committee Chair, stated Committee met on 3/7/25 and reviewed the following: <ul style="list-style-type: none"> <li>Reviewed lease schedules of all CSCF locations.</li> <li>Reviewed lease updates on: <ul style="list-style-type: none"> <li>Administration office – reducing space.</li> <li>Community Hubs complete and located inside Valencia College’s East campus and Seminole State College’s main campus.</li> <li>Lake-Career Center located at Lake Sumter State College – reducing 20-30% of space.</li> </ul> </li> <li>CSCF will continue to reduce overhead costs while strategically reaching those specifically seeking career support and upskilling by continuing to search for organizations, like the “Community Hubs” within colleges, that attract career seekers; where CSCF can co-locate to provide career support.</li> </ul> </li> </ul> <p><u>Career Services</u></p> <ul style="list-style-type: none"> <li>Mr. Muhammad, on behalf of Career Services Committee Chair, Andrew Albu, stated Career Services Committee met on 4/22/25 and reviewed following: <ul style="list-style-type: none"> <li>New training providers added to local Eligible Training Provider List, which Board approved on Consent Agenda for today’s 6/12/25 board meeting.</li> <li>Internship process, outcomes and impact. Committee provided feedback.</li> </ul> </li> </ul>	
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	<ul style="list-style-type: none"> <li>- Young adult programs: Summer Youth, Year-Round Youth, and High School Career Express. Reviewed outcomes and impact and Committee provided feedback.</li> <li>- Scorecard through 3<sup>rd</sup> quarter (7/1/24 thru 3/31/25).</li> <li>- Customer satisfaction for period 7/1/24 thru 4/4/25: received an overall satisfaction rating of 9 (based on 1 out of 10 scale).</li> <li>- Focus on the growing STEM and hospitality careers and encourage career seekers to those occupations.</li> <li>- Highlights with Summer Youth program, community hubs and CSCF &amp; Goodwill pilot.</li> </ul> <p><u>Community Engagement</u></p> <ul style="list-style-type: none"> <li>• Ms. LeWinter, on behalf of Community Engagement Chair, Mr. Sprinkle, stated committee met on 6/2/25 and reviewed the following: <ul style="list-style-type: none"> <li>- Potential legislative impact that could affect funding, training programs and reduction in support.</li> <li>- Website refresh updates; launched Donations page. Currently refining site map.</li> <li>- Upcoming priorities to include: rollout of BOLD initiative and strategic communication goals for 2025-2026.</li> </ul> </li> </ul> <p><u>Committee feedback:</u></p> <ul style="list-style-type: none"> <li>- CSCF should showcase to CareerSource Florida and Florida Commerce the great audits and savings on fixed costs – monetize this.</li> </ul> <p><u>Finance Committee</u></p> <ul style="list-style-type: none"> <li>• Mr. Ushkowitz, Finance Committee Chair, reported the Budget Workshop occurred on 5/22/25 where the Board reviewed budget priorities for FY 2025-2026.</li> </ul> <p>The Finance Committee met on 6/4/25 and went over the following:</p> <ul style="list-style-type: none"> <li>- Approved the following items for Board's final approval: <ul style="list-style-type: none"> <li>o <b>Approved the draft budget for FY 2025-2026.</b></li> </ul> </li> </ul>	<p><b>Mr. Hayward made a motion to approve the 2025-2026 Budget. Mr. Walton seconded; motion passed unanimously.</b></p>
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	<ul style="list-style-type: none"> <li>○ <b>Community Hub Lease: Seminole State College</b></li>   <li>○ <b>Community Hub Lease: Valencia College</b> Related Party Contracts: <ul style="list-style-type: none"> <li>- Mr. Battista, Valencia College, indicated before the meeting that he had a conflict of interest and needed to abstain from discussion and voting. Staff presented a Related Party Contract with CareerSource Central Florida and Valencia College in the amount of \$10,875 annually.</li> <li>- Mr. Hindle, Hanson, Walter &amp; Associates, Inc., indicated before the meeting that he had a conflict of interest and needed to abstain from discussion and voting. Staff presented a Related Party Contract with CareerSource Central Florida and Valencia College in the amount of \$10,875 annually.</li> <li>- A copy of the Board meeting and committee meeting minutes that documents the discussion and approval of the Related Party Contract (including the name of the contractor and the value of the contract) will be forwarded to Florida Commerce.</li> </ul> </li>   <li>- Approved the following items which Board approved under Consent Agenda earlier in this meeting: <ul style="list-style-type: none"> <li>○ Finance Charter</li> <li>○ Unrestricted Investment Account Broker</li> <li>○ Transfer Authority of WIOA Adult/DW Funding</li> <li>○ Waiver Request of ITA Training Requirements</li> </ul> </li>   <li>- Reviewed financials thru 3/31/25</li> </ul>	<p>Mr. Hayward made a motion for the Board to approve the execution of lease agreement with Seminole State College. Mr. Walton seconded; motion passed.</p> <p>Mr. Hayward made a motion for the Board to approve the related party contract with CareerSource Central Florida and Valencia College in the amount not to exceed \$10,875 annually. Mr. Nakagawa seconded, with Mr. Battista and Mr. Hindle abstaining; motion passed.</p> <p>The related party contract will be sent to Florida Commerce for approval</p> <p><b>Yeas: 25</b> <b>Nays: 0</b> <b>Abstentions: 2</b></p>
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	<p><u>Governance</u></p> <ul style="list-style-type: none"> <li>Ms. Olson, Governance Committee Chair, stated Committee met on 5/14/25 and:             <ul style="list-style-type: none"> <li>Reviewed proposed Board Roster for FY 2025-2026. All Board Member whose seats expire on 6/30/25 have agreed to renew for another 3-year term. Dr. Vazquez with OCPS will be replaced by Mr. Robert Bixler with OCPS.</li> <li>Approved a proposed Slate of Officers for Board's final approval (attachment):                 <ul style="list-style-type: none"> <li>Chair: Sheri Olson</li> <li>Vice Chair: David Sprinkle</li> <li>Treasurer: Eric Ushkowitz</li> <li>Secretary: Jeff Hayward</li> </ul> </li> <li>Reviewed Board Engagement through 4/30/25 (attachment). To date (through 6/12/25):                 <ul style="list-style-type: none"> <li>Participation: 81% (Annual Goal is 90%)</li> <li>Demonstration: 100% (Annual Goal is 80%)</li> <li>Contribution: 92% (Annual Goal is 70%)</li> </ul> </li> </ul> <p><u>Revenue Diversity and New Markets</u></p> <ul style="list-style-type: none"> <li>Mr. Gill, Revenue Diversity and New Markets Committee Chair, stated the Committee met on 5/28/25 and reviewed the following:             <ul style="list-style-type: none"> <li>Grant details and funding results 7/1/24 thru 5/28/25. Currently exceeding annual \$6M by 111% (\$6.7M).</li> <li>"Pouring with a Purpose" event occurring on 4/16/25 was a success and helped increase board participation and contributions.</li> <li>Ticket To Work challenges requiring staff to maintain reaching customers, but cases get dropped if staff can't reach after 90 days. Staff looking for ways to resolve this issue.</li> <li>Reviewed donor cycle map and areas of focus within the map. Committee provided feedback.</li> <li>Reviewed FY 2025-2026 development goals.</li> <li>Signature breakfast planning on 9/16/25.</li> </ul> </li> </ul> </li></ul>	<p><b>Mr. Walton made a motion to approve Slate of Officers, as presented. Mr. Battista seconded; motion passed unanimously.</b></p>
9	<p><b>Other Business</b></p> <p>None offered.</p>	
10	<p><b>Adjournment</b></p> <p>Meeting adjourned at 10:30 am.</p>	

Respectfully submitted,

Kaz Kasal  
Executive Board Coordinator

## ACTION MEMO

TO: CareerSource Central Florida Board of Directors  
From: CSCF Finance Committee  
Subject: Facilities Update  
Date: 09/25/2025

**Background:** The Facilities Ad-Hoc Committee convened to review key updates regarding CareerSource Central Florida's (CSCF) leased facilities. This memo provides a summary of current lease amendments, hub launches, and proposed actions for consideration.

### Administration Office (Downtown Orlando)

- **Contraction of Space:** CSCF will return approx. 5,000 sq. ft. on the east side of the building within 60 days of lease amendment execution. This portion represents a prime leasing area for the landlord.
- **Lease Term & Rate:**
  - Savings of approx. **\$92,965** in base rent due to early give-back (original lease end date July 31, 2026).
  - Lease extended 62 months, new expiration **September 30, 2031**, with 3% annual escalations.
- **Parking:** 40 unreserved spaces at \$125/space.
- **Tenant Improvements:** \$5/sq. ft. allowance for paint and carpet refresh; landlord covers demising costs (savings of **\$35,130**).
- **Free Rent:** 2 months (Jan–Feb 2026), representing **\$39,814** in savings.
- **Market Data:** Comparable rental rates for downtown Orlando (4,000–6,000 sq. ft.) range from \$29–\$38 per sq. ft. CSCF will pay \$34 sq. ft. ([Full Service](#) Lease).

### Valencia Hub (Launched 4/10/25)

- Staffing: 2–3 staff onsite, Mon–Thurs, 8 a.m.–5 p.m.
- Space: 725 sq. ft. for training, testing, and one-on-ones.
- Lease Terms:
  - Year 1 waived (CAM only).
  - Years 1–5: \$15/GSF (\$10,875 annually).
  - Renewal options Years 6–10: \$16/GSF; Years 11–15: \$17/GSF.
- Furniture and technology sourced internally; IT/communications cost [estimate](#) \$10K.

### Seminole Hub (Launched 4/28/25)

- Staffing: 2–3 staff onsite, Mon–Thurs, 8 a.m.–5 p.m.
- Space: 588 sq. ft. for testing and one-on-ones.
- Lease Terms (pending final facility use agreement):
  - \$18/GSF (\$10,875 annually).
  - Shared large meeting space: \$11,240 annually.
- Furniture sourced internally.



#### Lake-Sumter Office

- Reduction of 1,980 sq. ft. effective July 1, 2025.
- New footprint: 8,465 sq. ft. at \$17/GSF (\$143,905 annually).
- Savings: \$33,660 annually.

#### Financial Impact at a Glance

Center Lease Information	Expires	Current Year Cost	Next Year Cost	Difference	Comments
CSCF (Sumter/Lake) 9909 US Highway 441, Building M29, Leesburg, FL 34748	1/25/2025	\$185,407	\$150,387	(\$35,387)	Decrease represents 20% give back of space.
CSCF (Seminole) 1209 West Airport Boulevard, Sanford, FL 32773	6/30/2026	\$245,864	\$0	(\$245,864)	Not Renewing Lease
CSCF (West Orange) 9401 West Colonial Drive, Suite 403, Ocoee, Florida 34761	7/31/2026	\$368,673	\$204,697	(\$163,976)	Decrease represents TI Cost fully paid off.
CSCF (Osceola) 1800 Denn John Lane Bldg. CIT Suite 300 Kissimmee, FL 34744	12/31/2029	\$322,671	\$329,124	\$6,453	Increase represents 2% annual rent escalation
CSCF (Administration) 390 N Orange Avenue, Suite 700 Orlando, FL 32801	7/31/2026	\$398,916	\$238,884	(\$160,032)	Decrease represents 40% give back of space
CSCF (Southeast Orange) 5784 S. Semoran Boulevard, Orlando, FL 32822	9/30/2026	\$306,862	\$78,641	(\$228,221)	Not Renewing Lease. Cost represents 3 months of lease cost.
<b>TOTALS</b>		<b>\$1,828,393</b>	<b>\$1,001,733</b>	<b>(\$826,660)</b>	<b>Represents Approx Decrease of 45.2% in rental expense</b>

**Next Steps:** As we look ahead to the new fiscal year, CSCF will continue advancing its three-year strategy to reduce fixed lease costs. The Facilities Ad-Hoc Committee recommends notifying the Seminole and Southeast office landlords of CSCF's intent not to renew leases beyond their current terms. To ensure customer service is not disrupted, CSCF will strengthen its Virtual Services Department and expand its network of Community Hubs across the five-county region. CSCF currently operates two hubs and plans to open an additional four by June 2026.

**Action Item 1:** Finance Committee recommends that the CSCF Board approve to allow staff to notify the Seminole office landlord of CSCF's intent to not renew the leases beyond the current term.

**Action Item 2:** Finance Committee recommends that the CSCF Board approve to allow staff to notify the Southeast office landlord of CSCF's intent to not renew the leases beyond the current term.

*Approved:*

*Facilities Ad Hoc Committee: 8/25/25*

*Finance Committee: 9/3/25*

# Fiscal Year 2025/26 Budget Adjustment

AGENDA ITEM 6 D

Funding Sources		Original Revenue		Adjusted Revenue			
Carry In Funds From FY24 - 25		10,185,123		10,549,677			
FY25 - 26 Award		23,289,598		22,839,598			
Award Total - Available Funds		33,474,721		33,389,275			
LESS planned Carryover For FY26 - 27		(3,474,721)		(3,389,275)			
Total Available Funds Budgeted		30,000,000		30,000,000	\$ 0	0.0%	
		Current		Proposed Revised			
Expenditure Category		Budget		Budget			
Salaries/Benefits		14,400,000		14,900,000	500,000		
Training Investment		11,000,000		10,500,000	(500,000)		
Professional Services		1,000,000		1,000,000	-		
Outreach		350,000		350,000	-		
Infrastructure/Maintenance &Related Cost		2,000,000		2,000,000	-		
ITCost/Network Expenses		900,000		900,000	-		
StaffDevelopment &Capacity Building		350,000		350,000	-		
EXPENDITURES		30,000,000		30,000,000	-	0.0%	

[RETURN TO APPENDIX](#)

[RETURN TO AGENDA](#)






**POLICY TITLE: Firewall and Conflict of Interest Policy for One-Stop Operator**

---

**POLICY NUMBER: WIOA 19**

<b>Author: Merarie Rodriguez, Director of Workforce Operations</b>	<b>Effective Date: 10/1/2025</b>	<b>Revision Date:</b>
<b>Description of Revision(s):</b>		
<b>Approval:</b>	Gina Ronokarijo, VP Workforce Operations	
<b>Signature:</b>		

- I. **PURPOSE:** To establish safeguards that ensure CareerSource Central Florida (CSCF) operates its One-Stop Operator (OSO) function in compliance with the Workforce Innovation and Opportunity Act (WIOA), federal regulations, and state policy, while preventing conflicts of interest and maintaining separation from program operations.
- II. **APPLICATION:** This policy applies to CSCF staff, management, Board members, and partners involved with one-stop system operations and coordination.
- III. **BACKGROUND:** WIOA requires that local workforce development boards competitively procure a One-Stop Operator and implement firewalls to prevent conflicts of interest when boards or their staff assume this role. FloridaCommerce and CareerSource Florida policies further require documented safeguards and monitoring to ensure compliance.
- IV. **DEFINITIONS:**  
One-Stop Operator (OSO): The entity responsible for coordinating one-stop partner services and ensuring compliance with MOUs and IFAs.  
  
Firewall: Structural, functional, and decision-making separation that prevents conflicts of interest.  
  
Conflict of Interest (COI): A situation where personal or financial interests could improperly influence decisions or activities.
- V. **REFERENCES:**

Workforce Innovation and Opportunity Act (WIOA), §§121(d), 20 CFR 678.600–678.615, 20 CFR 679.430

Florida Statutes §445.009

CareerSource Florida Administrative Policy 097 – One-Stop Operator Procurement

CareerSource Florida Governance Policies

## **VI. POLICY OR PROCEDURE:**

### **Designation**

- CSCF's Business Intelligence (BI) Unit is designated as the OSO.
- The BI Unit reports to the Chief Innovation Officer (CIO), separate from the Chief Operating Officer (COO) and program operations.

### **Roles and Responsibilities**

- The OSO will coordinate mandatory one-stop partners, support MOU/IFA implementation, and ensure compliance with integration requirements.
- The OSO is prohibited from delivering career/training services, supervising program staff, procuring or evaluating service providers, or managing program budgets.

### **Firewalls and Separation of Duties**

- Structural: OSO placed outside Operations and reporting to CIO.
- Functional: OSO limited to coordination; Operations handles service delivery.
- Decision-Making: OSO excluded from procurement and provider evaluation.
- Information: OSO access limited to system-level reporting necessary for coordination.

### **Conflict of Interest Standards**

- Individuals engaged in OSO functions must not participate in decisions where personal or financial interests exist.
- Annual disclosure of potential conflicts is required; recusal is mandatory when conflicts arise.
- Compliance will review OSO functions quarterly for COI safeguards.

### **Reporting and Oversight**

- The OSO will submit quarterly reports on partner coordination, MOU/IFA compliance, and system performance to the COO and CIO.
- CSCF's Compliance Team will provide ongoing oversight and conduct quarterly internal review of OSO operations.
- An independent external vendor (currently THMP) will perform an annual review of OSO compliance and firewall effectiveness,

with results presented to CSCF leadership and the Board.

**Enforcement**

Violations will result in corrective action consistent with CSCF policies and governance standards, up to and including disciplinary measures or termination of agreements.

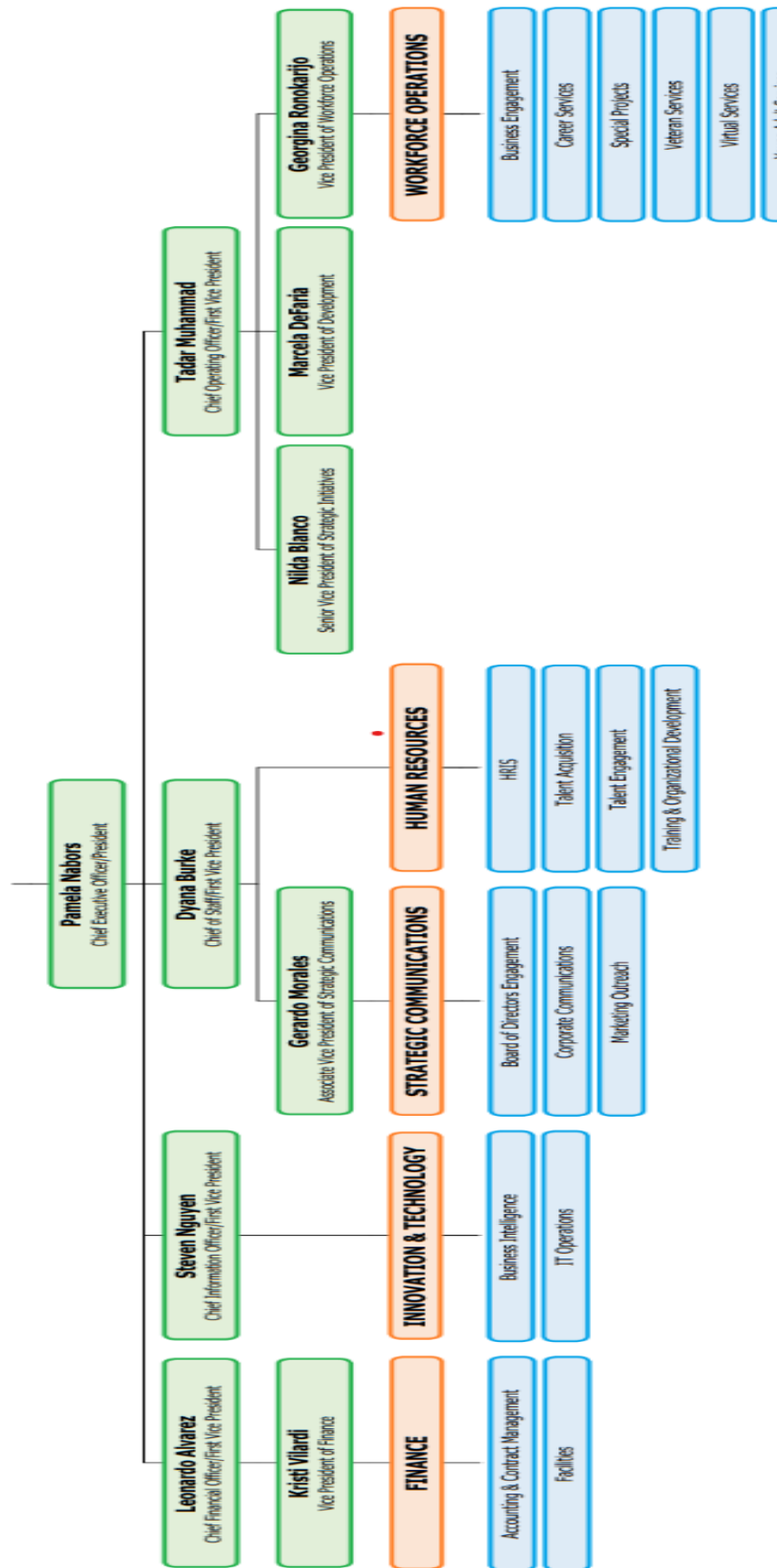
**VII. INQUIRIES:**

***Policy:*** Questions regarding this policy should be directed to the VP of Workforce Operations. Any updates to this policy will be communicated through the Chief Operations Officer or their designee and noted on page one of the policy.

**VIII. ATTACHMENTS/RESOURCES – CSCF Org Chart**



## Board of Directors



# Price Cost Analysis: One-Stop Operator Options (12-Month Comparison)

This updated report reflects a 12-month cost comparison between the TPMA One-Stop Operator contract (annualized to \$60,000) and the CareerSource Central Florida (CSCF) internal proposal for One-Stop Operator services (annualized to \$22,857). The analysis adjusts for full-year equivalency, since the CSCF proposal was originally budgeted for 9 months (October 1, 2025 – June 30, 2026 at \$20,000).

## 1. Current TPMA Contract Costs (Annualized)

- 10.5-month contract (Aug 15, 2024 – Jun 30, 2025): \$52,500
- Annualized Equivalent: **\$60,000**

Budget Breakdown (pro-rated to 12 months):

- Salaries & Benefits: \$45,202
- Travel/Meetings: \$2,500
- Communications: \$750
- Staff Development: \$100
- Insurance: \$450
- Indirect/Admin: \$5,000
- Profit: \$6,000
- Total: \$60,000

## 2. CSCF Internal Proposal (Annualized)

- Original Proposal: \$20,000 for 9 months (Oct 1, 2025 – Jun 30, 2026)
- Annualized Equivalent: **\$22,857**

Budget Breakdown (annualized from proposal p.10):

- Salary: \$13,714 (20% FTE)
- Taxes & Benefits: \$4,800
- Travel: \$1,371
- Indirect: \$2,972
- Total: \$22,857

Category	TPMA Contract (12 mo)	CSCF Proposal (12 mo)	Variance
Salaries & Benefits	\$45,202	\$18,514	-\$26,688
Travel/Meetings	\$2,500	\$1,371	-\$1,129
Communications	\$750	Included in indirect	—
Staff Development	\$100	Included in indirect	—
Insurance	\$450	Included in indirect	—
Indirect/Admin	\$5,000	\$2,972	-\$2,028
Profit	\$6,000	\$0	-\$6,000
Total	\$60,000	\$22,857	-\$37,143

### **3. Analysis**

- Annualized Comparison: CSCF's in-house proposal (\$22,857) saves approximately **\$37,143** (62%) compared to TPMA's annualized contract (\$60,000).
- Profit Margin Avoidance: Eliminates \$6,000 contractor profit.
- Indirect Costs: Consolidated at a lower rate within CSCF's structure.
- Governance Considerations: CSCF must ensure firewalls and independence in OSO oversight remain in compliance with WIOA requirements.

### **4. Recommendation**

Based on annualized costs, CSCF serving as its own One-Stop Operator is strongly recommended. The financial savings of over \$37,000 can be redirected toward direct program services, while maintaining compliance safeguards to ensure objectivity and regulatory adherence.



[careersourcerc.com](http://careersourcerc.com)

August 28, 2025

Dear Proposer:

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

CareerSource Central Florida (CSCFL) and your proposal passed technical review and was the only proposal received. Based on this review, CSRC is making the recommendation to the Board of Directors to have CSCFL serve as the OSO for the Local Workforce Development Area and LWDB12.

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

Sincerely,

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

Brian K. Bauer  
President/CEO

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





**REQUEST FOR PROPOSAL  
FOR  
ONE-STOP OPERATOR, CENTRAL FLORIDA REGIONAL  
WORKFORCE DEVELOPMENT BOARD, Inc.,  
/dba CAREERSOURCE CENTRAL FLORIDA**

**RFP-CSCF-25-OSO-01  
Date Issued: August 1, 2025  
DEADLINE FOR SUBMISSION: August 22, 2025**

**Submit Responses Electronically Only to:**  
CareerSource Research Coast (CSRC)  
[proposals@careersourcerc.com](mailto:proposals@careersourcerc.com)

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

For program funding details in compliance with the Stevens Amendment, please visit [www.careersourcerc.com/program-funding](http://www.careersourcerc.com/program-funding).



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## **Part I – General Information**

### **A. Central Florida Regional Workforce Development Board Inc., /dba CareerSource Central Florida-Background**

The Central Florida Regional Workforce Development Board Inc., /dba CareerSource Central Florida (CSCF) is one of 21 Local Workforce Development Boards (LWDBs) in the State of Florida. Each LWDB is designated by the Governor to oversee the Workforce Innovation and Opportunity Act (WIOA) services for geographical locations known as Local Workforce Development Areas (LWDAs). CSCF is designated as the fiscal and administrative entity for LWDA 12, which encompasses Lake, Orange, Osceola, Seminole, and Sumter counties. Through its 5 career centers and 4 community hubs located across the LWDA, CSCF serves businesses, job seekers, adults, youth, dislocated workers, refugees, and individuals transitioning from welfare to work.

The CSCF Board of Directors is composed of volunteers who represent local private sector businesses, educational institutions, economic development agencies, labor organizations, veterans' interests, community-based organizations and state and local government agencies. The Board of Directors conducts its business in accordance with federal and state laws, the Interlocal Agreement that created CSCF for LWDA 12, and CSCF's by-laws and approved policies.

The following is a list of CSCF's strategic goals:

- Build a Demand-Driven System with Employer Engagement.
- Strengthen the One-Stop Delivery System and Increase Integrated Service Delivery.
- Improve Services for Individuals with Barriers.
- Dedicated Commitment to Youth Participation.
- High Return on Investment through Continuous Improvement; and
- Strong Workforce System Leadership.

Additional information regarding CSCF, its members and approved policies is located on the CSCF website at <https://www.careersourcecentralflorida.com/about-us/>

### **B. Method of Solicitation**

A Request for Proposal (RFP) is a solicitation method that ensures open competition in order to maximize the likelihood of receiving exemplary workforce services proposals.

Notice of this RFP will be published on the CSCF website, <https://www.careersourcecentralflorida.com/about-us/work-with-us/> .

**REST OF PAGE INTENTIONALLY LEFT BLANK.**

### C. Background of Legislation for the Purpose of the Request for Proposal (RFP)

The Workforce Innovation and Opportunity Act (WIOA) sets forth a vision for the workforce development system to operate as a comprehensive, integrated, streamlined system that aligns with the needs of business and is a force in helping stimulate local economies. 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 programs and funding streams already integrated and delivered through CSCF's Career Centers are as follows:

- WIOA Title 1 Adult, Dislocated Worker, and Youth Programs
- Wagner-Peyser Employment Services
- Local Veterans' Employment Programs
- Disabled Veterans' Outreach Programs
- Trade Adjustment Assistance Programs
- Unemployment Compensation Programs
- Temporary Assistance for Needy Families (TANF) Programs
- Supplemental Nutrition Assistance Program (SNAP)

Other mandated partners are as follows:

- Family Literacy and Adult Education Act
- Vocational Rehabilitation
- Career and Technical Education
- Community Services Block Grant
- Second Chance Act
- Department of Housing and Urban Development

Inclusive of the requirements under WIOA is the necessity to competitively select a One-Stop Operator (**OSO**) to support the implementation of services with the career center system locally. Therefore, local workforce development boards are required to define the role of an **OSO** and competitively procure the entity or entities as set forth in sec. 121 (d) (2) (a) of WIOA. The **OSO** may be a single entity or multiple entities working together to form a consortium operator. The **OSO** may be for profit, non-profit, private, or public. CSCF, per 20 CFR § 678.620 requires, at a minimum, that the **OSO** must coordinate the service delivery of the required one-stop partners and service providers.

### D. Who May Apply

Eligible proposers must meet one of the following criteria:

- The One-Stop Operator must be a single entity or multiple entities working together to form a consortium. If the consortium is comprised of One Stop Career Center partners, it must include a minimum of three (3) One Stop Career Center partners in 20 CFR 678.400.
- A public, private, for-profit, or non-profit organization.
- An institution of higher education.
- A government agency.
- A community based, non-profit organization.

## **E. One-Stop Operator Qualifications**

CSCF seeks a Proposer that meets the following qualifications:

- Possess a strong business acumen and professional presence.
- 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.
- Ability to work with various demographics in the CSCF LWDA.
- An understanding of WIOA. Similarly, a general understanding of the local workforce system and its stakeholders is preferred.
- Has contracted to provide services similar in nature and complexity, with at least one organization, within the past three (3) years.
- Experience in meeting agenda development, planning, and execution.
- Ability to work closely with CSCF administrative staff to monitor the system's strategic objectives and make recommendations for system continuous improvements.
- Be licensed to conduct business in the state of Florida.

CSCF requires that entity 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 CSCF have been terminated for cause.

## **F. Contract Term**

Responses to this RFP are to be used to determine the best-qualified Proposer and will be the basis for negotiating a contract. The contract, if awarded, will be a term of four (4) years as a one (1) year contract to be renewed annually based upon performance. Renewal will be the option of CSCF and its Board of Directors.

## **G. Funding**

CSCF has approved funding in the amount not to exceed, \$20,000.00, per year, with an estimated total hour worked for the project not to exceed 520 hours. The Proposer is responsible for providing a reasonable and fair cost for services. CSCF reserves the right to negotiate amounts based on the entity's experience, ability to begin the project and understanding of the initiative.

## **H. Additional information**

- CareerSource Florida - <http://careersourceflorida.com/>
- Department of Florida Commerce - <http://www.floridajobs.org/>
- CareerSource Central Florida - <https://www.careersourcecentralflorida.com/>
- U.S. Department of Labor Employment and Training Administration - <https://www.doleta.gov/WIOA/FactSheet.cfm>
- Uniform Guidance, 2 CFR, Part 200-*Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*
- CareerSource Florida Administrative Policy 097 – *One-Stop Operator Procurement*



## I. General Proposal Instructions

CareerSource Research Coast (CSRC), through its competitive procurement process, is soliciting proposals to select an organization(s) to serve as a One-Stop Operator for CSCF. Respondents to this RFP shall articulate their plans of action to act as the One-Stop Operator. Proposers are advised to read this entire RFP before preparing and submitting a proposal. Proposals which do not follow the format, do not include all the minimum requirements specified in this RFP or are not submitted by the due date will not be considered for funding.

CSRC and/or CSCF will provide clarifying information about this request only. They are not available for technical assistance or advice. All questions regarding the RFP must be submitted, via email, to [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com). Questions must be submitted by **August 15, 2025**. Answers to all questions received will be posted to the <https://www.careersourcecentralflorida.com/about-us/work-with-us/> within 48 business hours. This is a competitive procurement. Employees will not provide any information from other proposers/proposals or other costs associated with similar or like projects, either current or in the past.

Please show the solicitation number **CSCF-25-OSO-01** and the name and address of the proposer on the cover page. One (1) electronic copy on company letterhead must be emailed to [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com) before 5 p.m. EST on **August 22, 2025**.

Proposals may be modified or withdrawn via email notification. Modifications must be received at the above email address prior to the date specified for receipt of proposals. No modifications will be accepted after the date and time noted above. Withdrawals will be accepted any time prior to execution of a contract.

All proposals must conform to the proposal format described below in this document and contain all the requested information and attachments **including three (3) references**.

Proposers are encouraged to keep proposals concise and to the point. Elaborate brochures are not wanted. The proposal and all attachments are to be standard size (8 1/2 x 11). CSRC will not furnish any materials, offer of labor/facilities for either the development of a proposal or completion of the desired project unless otherwise provided for in this RFP.

## J. Proposal Format

Proposals in response to this RFP shall adhere to the format outlined below:

1. Cover Letter: A cover letter with the RFP solicitation number and subject that includes a statement that the entity understands the scope of services for the One-Stop Operator and a total price quote to perform the work identified for an annual contract period of October 1, 2025, through June 30, 2026. The contract can be renewed for up to three (3) additional years based on successful performance. The name of the entity, local address, phone number, fax number/e-mail address and name of the contact person should also be included.
2. Proposal Narrative: A narrative of not more than three (3) pages that outlines the following information: a) the entity's understanding and experience in workforce development, the local workforce system and of WIOA; b) overview of the entity's previous experience facilitating stakeholder groups to common goals/objectives; c) explanation of the approach to providing each of the One-Stop Operator responsibilities (refer to PART III – One-Stop Operator Scope of Services of this RFP) and other information, experience, deemed relevant to this proposal.
3. License Information: Provide a copy of your state of Florida business license.
4. Budget Information: Provide a total cost for the delivery of the services described in PART III – One-Stop Operator Scope of Services, as well as budget detail by line item.
5. Completed Relationship Disclosure Form: (Attachment A)
6. List of and Contact Information of Three (3) References
7. Signed Sub-Recipient General Provisions, Certifications and Assurances: (Attachment D)

## Part II - RFP Calendar and Process

### A. Solicitation Timetable

RFP Events	COMPLETION DATE		
	Day	Date	Time
RFP Issued	Friday	August 1, 2025	8:00 a.m.
Deadline for Request for Clarification Inquiries	Friday	August 15, 2025	5:00 p.m.
Deadline for Receipt of Proposals	Friday	August 22, 2025	5:00 p.m.
Recommendations presented at the CSCF Board Meeting	Thursday	September 25, 2025	
Execution of Letter of Intent/Contract	Tuesday	September 30, 2025	
Contract Start Date	Wednesday	October 1, 2025	

CSRC, in its sole discretion, may change the schedule provided in the solicitation timetable, without further notice. Thus, the Proposer is responsible for routinely checking the CSCF website at <https://www.careersourcecentralflorida.com/about-us/work-with-us/> for amendments to the schedule.

### B. Request for Clarification

Proposer(s) shall submit, via e-mail, all questions regarding the clarification of any requirement or procedure to [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com) no later than 5pm on **August 22, 2025**.

Oral requests for clarification shall not be accepted. CSRC may reject any or all requests for clarification, in whole or in part. All written requests for clarification accepted by CSRC, along with corresponding responses, will be posted on the CSCF website at <https://www.careersourcecentralflorida.com/about-us/work-with-us/>.

Questions concerning this RFP must be submitted, via email (with Subject: **CSCF-25-OSO-01, Questions**), to the following email address: [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com). Questions must be received no later than the time and date reflected in Part II – RFP Calendar and Process). All questions submitted shall be published and answered in a manner that all Proposers will be able to view in accordance with the timetable.

### **C. Conditions of Proposal**

The following conditions are applicable to all proposals:

- CSRC reserves the right to reject any and all proposals, in whole or in part, and to accept any proposal that is deemed most favorable to CSRC at the time and under the conditions stipulated in this RFP.
- Non-conforming proposals will be considered non-responsive and are subject to return without review; however, CSRC reserves the right to waive informalities and minor irregularities in the proposals received.
- CSRC reserves the right to request additional information from proposers for clarification or to allow corrections of errors or omissions.
- All proposals are subject to negotiation by CSRC.
- CSRC reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the entity of the conditions contained in this request for proposals unless clearly and specifically noted in the proposal submitted and confirmed in the contract between CSCF and the entity selected.
- All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Proposer and will not be reimbursed by CSRC or CSCF. The Proposer must, at their own expense, obtain all necessary permits and pay all licenses, fees, insurances, and taxes required to comply with all local ordinances, state and federal laws, rules, and regulations applicable to business to be carried out under the proposed contract.

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## Part III - One Stop Operator Scope of Services

### A. One-Stop Operator (OSO)

This scope of services outlines the Statement of Work (SOW) and establishes the expectations, responsibilities, and deliverables for the One-Stop Operator (OSO) for CareerSource Central Florida (CSCF). The OSO, serving in a consultative and coordination role, will support the local workforce system in aligning and optimizing services across partners to achieve CSCF's service delivery vision and performance goals. CSCF shall designate an OSO in accordance with 20 CFR 678.605-678, 625, Section 445-0009, F.S., and applicable state policies, including the following one-stop delivery system requirements:

- a. Each partner program in the CSCF career centers will contribute to infrastructure costs at a rate negotiated and agreed upon by the Parties, or pursuant to a policy established by the Governor. The mandated infrastructure elements, set forth specifically in 20 CFR 678.755, must be incorporated into the period of time in which the infrastructure funding agreement is effective. Though not likely, this may be a different time frame than the duration of the Memorandum of Understanding (MOU).
- b. Identification of an infrastructure and shared services budget that will be periodically reconciled against actual costs incurred and adjusted accordingly to ensure that it reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to its use of the career center and relative benefit received, and that complies with 2 CFR part 200 (or any corresponding similar regulation or ruling).
- c. Identification of all career center partners, Chief Local Elected Official(s) (CLEO), and CSCF participating in the infrastructure funding arrangement.
- d. Steps CSCF, CLEO's, and career center partners used to reach consensus or an assurance that the LWDA followed the guidance for the state funding process.
- e. Description of the process to be used among partners to resolve issues during the MOU duration period when consensus cannot be reached.
- f. Description of the periodic modification and review process to ensure equitable benefit among one-stop partners.
- g. CSCF shall incorporate infrastructure funding provisions in each MOU with its one-stop partners. Remedies or dispute resolution for nonperformance must also be included.

CSCF is seeking an organization with expertise and established track record for providing services required of a One-Stop Operator. For purposes of this RFP, CareerSource Research Coast defines the basic role of a One-Stop Operator as an entity that will coordinate the service delivery of participating one-stop partners and service providers within the CSCF career centers. The selected entity will be responsible for working with CSCF to assure that CSCF is coordinating services across program lines and with other organizations required by WIOA.

#### The Statement of Work:

##### a. Memorandum of Understanding (MOU) Management

1. Develop, review, and monitor MOUs between CSCF and one-stop partners for the operation of the one-stop delivery system:
  - Content Requirements: Ensure MOUs comply with federal and state requirements.
  - Service Coordination: Define how services will be coordinated and delivered.
  - Funding Provisions: Detail funding mechanisms for services and system operating costs.
  - Referral Processes: Establish referral methods between the Operator and one-stop partners.
  - Accessibility: Address the needs of workers, youth, individuals with barriers to employment, and individuals with disabilities, ensuring access to technology and materials.

- Review Periods: Define MOU duration and amendment procedures, with a minimum review every three (3) years.
- Other Provisions: Include additional provisions as determined appropriate by all parties.

#### b. Continuous Improvement of One-Stop Centers

##### 1. Facilitate Partner Collaboration:

- Coordinate and conduct up to four (4) meetings annually with one-stop partners to support MOU implementation.
- Develop meeting agendas (in coordination with CSCF staff), facilitate discussions, and prepare/distribute meeting notes.

##### 2. Evaluate Accessibility and Effectiveness:

- Establish objective criteria and procedures to assess effectiveness, physical accessibility, and programmatic accessibility in compliance with WIOA Section 188 and the Americans with Disabilities Act (ADA).

##### 3. Promote Technological and Service Delivery Enhancements:

- Develop strategies for technological improvements to enhance access and service quality, including:
- Digital literacy skill development.
- Accelerating attainment of skills and postsecondary credentials.
- Strengthening professional development for workforce providers.
- Ensuring accessibility of technology for individuals with disabilities.

##### 4. Improve Coordination Across Partner Programs:

- Design and implement strategies for enhanced coordination across programs, including:
- Common intake processes.
- Data collection and reporting systems.
- Performance measurement mechanisms.

#### c. Reporting Requirements

##### 1. Quarterly Reports:

- In collaboration with CSCF staff, develop a mechanism to report on partnership progress and system performance.
- Present quarterly reports to the CSCF Board of Directors.
- Ensure reports align with CSCF meeting requirements and formats.

#### **One-Stop Operators cannot conduct the following activities:**

Per WIOA regulations and CSCF policies, the One-Stop Operator shall not provide direct career services as defined in WIOA Sec. 134(c)(2), including but not limited to:

- Eligibility determination.
- Outreach, intake, and orientation.
- Skills assessment and support service needs.
- Labor exchange and business services.
- Referrals and coordination with other programs.
- Provision of labor market and performance information.
- Assistance with filing claims for Reemployment Assistance.
- Financial aid eligibility support.
- Follow-up services.



The Operator is also prohibited from performing the following functions:

- Convening system stakeholders for local plan development.
- Preparing or submitting local plans.
- Oversight of itself.
- Managing or participating in the competitive selection process for one-stop operators.
- Selecting or terminating one-stop operators, career service providers, or youth providers.
- Negotiating local performance accountability measures.
- Developing and submitting budgets for CSCF activities.

CSCF has been approved to provide, and will continue to provide, direct career services as defined by the WIOA §134(c)(2) and shown below. As a result, this RFP's **SOW** does not include the One-Stop Operator providing training services or providing any of the following career services or information:

- 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 (LMI).
- Providing performance and program cost information of training contractors.
- Providing performance information on CSCF regarding accountability measures.
- Providing information on the availability of, and referral to, support services, Supplemental Nutrition Assistance Program (SNAP), and Temporary Assistance for Needy Families (TANF).
- Providing information and assistance on filing claims for Reemployment Assistance (RA).
- Providing assistance in establishing eligibility for financial aid for programs not funded through WIOA.
- Providing services to obtain and retain employment, such as comprehensive assessment, IEP (Individual Employment Plan) development, group and individual counseling, career planning, internship and Work Experience, financial literacy, out of area job search, ESOL (English to Speakers of Other Languages), etc.
- Providing follow-up services.

## **B. Additional Requirements**

### **Monitoring**

WIOA requires the LWDB to conduct monitoring of its **OSO**. Oversight and monitoring are an integral function of the state and LWDBs to ensure the **OSO's** compliance with the requirements of WIOA, the activities per the **SOW**, performance reporting requirements, and the terms and conditions of the contract or agreement governing the **OSO**. CSCF must measure, track, and monitor performance, service deliverables, and achievement of program or performance measures.

CSCF must ensure that the **OSO** do the following:

- a. Disclose any potential conflicts of interest arising from the relationships of the **OSO** with training service providers or other service providers, including but not limited to, career services providers.
- b. In coordinating services and serving as an **OSO**, 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 an **OSO**, that also serves a different role within the one-stop delivery system, may perform some or all these functions when it is acting in its other role if it has established sufficient firewalls and conflict of interest policies and procedures. The policies and procedures must conform to the specifications in 20 CFR § 679.430 for demonstrating internal controls and preventing conflict of interest.

### **Confidentiality and Disclosure**

The **OSO** shall comply with applicable laws, regulations, and requirements, including but not limited to: Workforce Innovation and Opportunity Act (WIOA), Americans with Disabilities (ADA), Equal Employment Opportunity (EEO) and nondiscrimination provisions (29 CFR Part 38), and Florida “Sunshine Law” regarding official activities of the local board of directors.

The **OSO** 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 CSCF Consortium, CSCF Board of Directors, and appropriate CSCF staff. Other than these exceptions, the **OSO** will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.

The **OSO** shall comply fully with all security procedures of the United States, State of Florida, and CSCF in performance of the contract. The **OSO** 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 of Florida or CSCF.

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## Part IV - Evaluation Process and Selection Criteria

### A. Initial Technical Review

All timely proposals received will be reviewed by CSRC's employees to determine if they are responsive and if the proposals are eligible for further consideration. Proposals may be judged nonresponsive and removed from further consideration if the proposal is not received timely in accordance with the terms of this RFP; does not follow the specified format; does not include the required certifications; and is not adequate to form a judgment by the reviewers that the proposal meets the needs of CSRC and the intent of this RFP.

### B. Review by RFP Review Team

An RFP Review Team (TEAM) consisting of members of CSRC's employees will be organized to review and rate proposals. This TEAM will review proposals successfully passing the initial technical review. Proposals will be evaluated using a point system. (See Attachment F - Rating Sheet for RFP - **CSCF-25-OSO-01**). The TEAM will review and discuss their evaluations of all proposals, combine the individual scores, and arrive at a composite technical score for each proposal. These scores will be used to determine the most advantageous proposal for CSCF.

The TEAM recommendation will be presented CSCF's Executive Committee, and upon approval, the recommendation will be forwarded to CSCF Board of Directors on the date/time as indicated in PART II – Calendar and Process, Section A – Solicitation Timetable.

The CSCF Board of Directors will decide to accept, reject, or accept with modifications the recommendation of the CareerSource Research Coast TEAM.

The approval of a proposal does not provide approval for any proposed cost, term, and/or condition.

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

### C. Small and/or Minority-Owned Businesses

Efforts will be made by CSRC to utilize local small business, minority, veteran, or women-owned businesses. A Proposer qualifies as a small business firm if it meets the definition of "Small Business" as established by the Small Business Administration (13 CFR 21.3-8) by having average annual receipts for the last three fiscal years of less than four million dollars.

### D. Proposal Acceptance/Protest

This request for proposal does not obligate CSCF to award a contract. CSRC reserves the right to accept or reject any or all proposals received. The proposal term, if awarded, will be for four (4) years with a one (1) year contract to be renewed annually (July 1 – June 30) based upon successful performance.

Any award resulting from this request will be based on the entity's stability and experience related to this RFP, the entity's ability to handle the tasks noted in this RFP and the entity's cost.

CSRC reserves the right to waive informalities and minor irregularities in offers received.

Before a contract is offered, the Proposer must submit the required certifications provided in this packet. **If you are unable to provide this information, please do not submit a proposal.**

CSCF may award a contract based on initial proposals received without negotiation of such proposals. Therefore, each initial proposal should be submitted on the most favorable price and technical terms. CSRC reserves the right to request additional information, oral discussion, or presentation in support of proposals submitted.

If an award is made, the contract will be a cost-reimbursement contract, as needed. Services will be implemented only upon notification from CSCF. Payment for services rendered will be made only when costs have been incurred and documentation of all costs are received and verified.

All Proposers have the right to protest the award. Parties wishing to protest a contract award may submit their objections in writing within 10 days of the award date to the President/CEO of CSCF who will provide the information to the CSCF's Board of Directors. The CSCF Board of Directors will investigate the complaint and issue a written finding and resolution to the protesting party within 45 days of the receipt of the complaint.

This protest procedure provides recourse to Proposers who believe that their proposal did not receive proper consideration. Proposers entering a protest should be prepared to document specific factors that put the aggrieved Proposer at a competitive disadvantage and/or document violations of specific sections of state or federal regulations, CareerSource Florida, Inc., and the procedures set forth by this RFP. CSCF reserves the right to refuse to consider an appeal that does not identify specific procedural shortcomings.

#### **E. Negotiations**

A contract will be negotiated with the first ranked Proposer, and if negotiations are successful, that Proposer will be recommended to CSCF Board of Directors for award. In the event negotiations are not successful, negotiations with that Proposer will be terminated and negotiations begun with the second ranked Proposer and so forth until negotiations are successfully completed to the satisfaction of CSCF or until all acceptable proposals have been rejected.

#### **F. Notification of Award**

Upon conclusion of final negotiations with the successful Proposer, all Proposers will be notified in writing of their status. The final award decision will be made no later than **September 25, 2025**. Contract negotiations may commence any time following that date and are to be completed by **September 30, 2025**, with the execution date of contract to begin **October 1, 2025**.

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## A. Relationship Disclosure Form

This form must be completed by the Proposer.

In the event any information provided on this form should change, the Proposer must file an amended form on or before the date the item is considered by CareerSource Central Florida (CSCF).

### Part I: Information on Proposer

Legal Name of Proposer: \_\_\_\_\_

Business Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

### Part II:

Is Proposer a relative of any CSCF principal? ☐ Yes ☐ No

Is any CSCF principal an employee of proposer? ☐ Yes ☐ No

Is Proposer an employee of any CSCF principal? ☐ Yes ☐ No

Is Proposer a business associate of any CSCF principal? ☐ Yes ☐ No

If you responded "Yes" to any of the above questions, please state with whom and explain the relationship (use additional sheets if necessary): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Part III: Original Signature Required

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to the date of which CSCF awards a contract for the One-Stop Operator. In accordance with s.837.06 Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s.775.082 or s.775.083, Florida Statutes.

\_\_\_\_\_  
Printed Name/Title of Person Completing Form

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## **B. WORKER'S COMPENSATION RELEASE**

This unconditional release, waiver and hold harmless agreement is given by the undersigned to CareerSource Central Florida, (CSCF), as a specific condition of the undersigned performing work for CSCF as an independent Contractor. It is the intent of the undersigned that CSCF rely on the statements made herein as being true, correct and all representations are predicated on the personal information and knowledge of the undersigned.

1. The undersigned is retained by CSCF, as an independent Contractor as that term applies in the state of Florida and as interpreted by the Internal Revenue Code, as amended. The undersigned is in no way connected with, an employee of, or otherwise related to CSCF, in any manner except by and through an independent Contractor relationship.
2. The undersigned hereby agrees that all employees or subcontractors hired by the undersigned to work on any project involving CSCF shall be covered by Worker's Compensation in accordance with the laws of the State of Florida as same may exist from time to time.
3. The undersigned for him/herself, his/her heirs, successors, assigns, employees, agents, subcontractors, employees of subcontractors and all of their successors, heirs, assigns and agents, warrants that no one shall file a claim for Worker's Compensation benefits by, through or against CSCF for which the Contractor has been engaged through a contract to perform services.
4. The undersigned hereby agrees to indemnify, defend, save, and hold harmless, CSCF from any and all liability of any nature whatsoever, without limitation, arising out of any Worker's Compensation claim filed by the undersigned, its employees, agents, heirs, successors, subcontractors, or the agents, employees, heirs or successors of such subcontractors and employees. This hold-harmless agreement shall include, but not be limited to, the cost of judgment, settlement, investigation, attorney's fees, court costs and the like. It is specifically intended that this hold harmless agreement be broad in scope and without limitation, such that CSCF is protected to the greatest extent allowed by law from any such claims.
5. The undersigned, for him/herself, his/her agents, employees, heirs, successors, assigns, subcontractors and the employee's, agents, successors or assigned of such subcontractors and employees hereby releases CSCF from any and all claims for Worker's Compensation Liability, or any other liability arising out of any injury on the job, without limitation or reservation.
6. This waiver, release and hold harmless agreement is given by the undersigned to CSCF in contemplation of, and for the specific purpose of, releasing CSCF from any and all liability of any nature whatsoever resulting from injuries on the job-, or work-related injuries, or worker's compensation claims under the laws from the state of Florida as same may exist from time to time. It is specifically understood that CSCF shall have no such liability, and further that the undersigned is fully accepting, all such responsibility and liability.
7. This agreement is given freely, voluntarily, knowingly, and intentionally by the undersigned without the exercise of force, coercion, or undue influence by CSCF or any of its agents, employees, officers, or any other person acting for, or on behalf of CSCF. The undersigned knows and understands the intent of this agreement and is aware of the legal implications of the same, and has had the advice of counsel, or alternatively has waived the advice of counsel and is proceeding notwithstanding same.
8. This agreement shall be construed in accordance with the laws of the state of Florida as may exist from time to time. The parties hereto agree to venue and jurisdiction in the courts of CSCF's local workforce development area for the resolution of all disputes connected hereto. In any event of any litigation to enforce the terms and conditions of this agreement, the prevailing party shall be entitled to recover actual attorney's fees and costs.
9. The foregoing terms and conditions constitute the entire agreement by and between the parties hereto. Any representations not contained herein shall be of no force or effect and shall be null and void.

10. In the event a court of competent jurisdiction shall determine any term or condition to be illegal, or otherwise unenforceable, the remaining terms and conditions of this agreement shall be given full force and effect to the greatest extent possible to carry out the stated intent of the parties.

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Contractor

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Name and Title of Certifying Representative

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Signature of Certifying Representative

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Date

## C. PROPOSER CONTRACT CERTIFICATIONS

On behalf of the Proposer:

- A. The individual signing certifies that he/she is authorized to contract on behalf of the Proposer.
- B. The individual signing certifies that the Proposer is not involved in any agreement to pay money or other consideration for the execution of this agreement, other than to an employee of the Proposer.
- C. The individual signing certifies that he/she has read and understands all the information in this agreement, including the information on the programs/grants/contracts/regulations and laws. Ignorance of the requirements will not relieve the Proposer from liability and obligations under the contract.
- D. The individual signing certifies that the Proposer and any individuals to be assigned to the agreement do not have a record of substandard work or found in violation of any state standards. If the Proposer or any individual to be assigned to the agreement has been found in violation of any state or professional standards at any time, this information must be disclosed.
- E. The individual signing certifies that the Proposer and any individuals to be assigned to the agreement have not been disbarred or suspended under Federal or state rulings from participating in receipt of funds under the agreement. The individual signing must also certify that the organization will not enter into contracts with subcontractors who are debarred or suspended from these transactions, nor are they presently retained by any of CSCF's current service providers.
- F. The individual signing certifies that the Proposer will not use contract funds to lobby and will freely sign the attached Byrd Anti-Lobbying Certification (**Attachment D - #5**).
- G. The individual signing certifies that the Proposer carries Worker's Compensation coverage for its employees and will freely sign the attached Worker's Compensation Release form (**Attachment B**).
- H. The individual signing certifies as to the Proposer's Federal Employer's Identification Number (FEIN) and will provide the number to CSCF's Finance Department.
- I. The individual signing certifies that the Proposer is bound by federal, state, or local affirmative action/EEO rules and that it has filed all required EEO reports to cognizant government agencies.
- J. The individual signing certifies that if there is a subcontract or partnership effort it must be fully explained and that signed certifications will be required by CSCF from the principals of all firms.
- K. The individual signing certifies that the Proposer can submit proof of business licensure if selected.
- L. The individual signing certifies that the Proposer will comply with the requirements of CSCF's General Provisions & Assurances (**Attachment D**).

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Proposer

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Name and Title of Certifying Representative

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Signature of Certifying Representative

---

Date

## **D. GENERAL PROVISIONS AND ASSURANCES**

This attachment is part of the Subrecipient agreement held between CareerSource Central Florida (CSCF) and Subrecipient for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

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

The warranty of this Section specifically includes compliance by Subrecipient with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, 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: Subrecipient agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Subrecipient 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**

Subrecipient 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 to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States based on 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 WIA Title I- Financially assisted program or activity.
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation, or beliefs.
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Subrecipient also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Subrecipient will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

#### **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 more than \$100,000, Subrecipient 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 Subrecipient shall report any violation of the above to the contract manager. Energy Efficiency: The Subrecipient 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).

Subrecipient 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 Subrecipient 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**

Subrecipient 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 more than \$100,000, Subrecipient must, prior to contract execution, complete the Certification Regarding Lobbying Form.

#### **6. CONFIDENTIALITY**

It is understood that the Subrecipient shall maintain the confidentiality of any information, regarding CSCF 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. Subrecipient shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CSCF for purposes related to the performance or evaluation of the Agreement may be divulged to

CSCF 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 CSCF. No release of information by Subrecipient, if such release is required by Federal or State law, shall be construed as a breach of this Section.

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

CSCF, 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 CSCF, 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, Subrecipient 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 Subrecipient expense, at reasonable locations as determined by CSSFL. Subrecipient shall

respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSCF.

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

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 days prior written notice to the other party.
- b. CSCF 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. CSCF may unilaterally terminate this modified agreement at any time that it is determined that:
  - i. Subrecipient fails to provide any of the services it has contracted to provide; or
  - ii. Subrecipient fails to comply with the provisions of this modified agreement; or
  - iii. Such termination is in the best interest of CSCF.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Subrecipient disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to CSCF Joint Administrative Committee, 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, Subrecipient shall be liable to CSCF for damages sustained for any breach of this modified agreement by the Subrecipient, including court costs and attorney fees, when cause is attributable to the Subrecipient.

In instances where Subrecipient violates or breaches modified agreement terms, CSCF will use all administrative, contractual, or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

## **10. PUBLIC ANNOUNCEMENTS AND ADVERTISING**

Subrecipient 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, Subrecipient 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.

## **11. PUBLIC ENTITY CRIMES**

Subrecipient shall comply with subsection 287 .L33(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor 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 Lessor, supplier, sub-Lessor 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.Ot7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.

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

Subrecipient 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.



**13. PROCUREMENT OF RECOVERED MATERIALS**

Subrecipient 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**

Subrecipient 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.

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

Subrecipient 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**

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

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person's employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee's employment eligibility upon the renewal or extension of his or her contract. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify, the federal government's database for verifying work authorization.

**17. FREE SPEECH AND RELIGIOUS LIBERTY (APPLICABLE TO SUB-RECIPIENTS ONLY)**

Subrecipient 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. HATCH ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with the provisions of the HATCH ACT, 5 U.S.C. 1501-1508 and 7328 which limit the political activities of employees whose principal employment activities are funded in whole or part with Federal funds.

**19. ETA SALARY LIMITATION (APPLICABLE TO SUB-RECIPIENTS ONLY)**

Sub-Recipient certifies that is in compliance with Public Law 109-234, and that none of the funds appropriated in Public Law 109-149 or prior Acts under the heading "Employment and Training" that are available for expenditures on or after May 1, 2012, shall be used by a recipient or sub-recipient of such funds to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II, except as provided for under Section 101 of Public Law 109-149. This limitation shall not apply to Sub-Recipients providing goods and services as defined in 2 CFR200.

**20. TRAFFICKING VICTIMS PROTECTION ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with the Trafficking Victims Protection Act of 2000 (2 CFR 175).

**21. VETERAN'S PRIORITY OF SERVICE (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient agrees to comply with the Veteran's Priority of Service Provisions (38 U.S.C. 4215 and 20 CFR 1010).

**22. EQUAL TREATMENT FOR FAITH-BASED ORGANIZATIONS (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with 29 CFR 2, Subpart D which prohibits any State or local government receiving funds under any Department of Labor program, or any intermediate organization with the same duties as a governmental entity, from discriminating for or against an organization on the basis of the organization's religious character or affiliation. Prohibits religious organizations from engaging in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded with direct financial assistance. Prohibits an organization that participates in programs funded by direct financial assistance from the Department of Labor, in providing services, from discriminating against a program beneficiary or prospective program beneficiary based on religion or religious belief. Any restrictions on the use of grant funds shall apply equally to religious and non-religious organizations.

**23. NEVER CONTRACT WITH THE ENEMY**

Contractor agrees to comply with regulations implementing Never Contract with the Enemy in 2 CFR part 183. The regulations in 2 CFR part 183 affect covered contracts, grants and cooperative agreements that are expected to exceed \$50,000 within the period of performance, are performed outside the United States and its territories, and are in support of a contingency operation in which members of the Armed Forces are actively engaged in hostilities.

Subrecipient Name: \_\_\_\_\_

Authorized Representative

Printed Name & Title: \_\_\_\_\_

Authorized Representative

Signed Name & Title: \_\_\_\_\_ Date: \_\_\_\_\_

## E. INITIAL TECHNICAL REVIEW – ONE-STOP OPERATOR - RFP-CSCF-25-OSO-01

PROPOSER: \_\_\_\_\_

Did the proposal meet all of the following criteria? If not, the proposal may not be submitted for further review.

Proposal was received by submission deadline – on/before 5:00 p.m. on Aug 29, 2025?

Yes ☐ No ☐

Proposal included one electronic version?

Yes ☐ No ☐

Proposal was submitted in proper format.

Yes ☐ No ☐

Proposer included three (3) current references?

Yes ☐ No ☐

Proposer provided a budget as requested?

Yes ☐ No ☐

Proposer indicated a financial relationship with CSCF Board of Directors, and the relationship is a conflict of interest?

Yes ☐ No ☐

Proposer is licensed to conduct business in the state of Florida?

Yes ☐ No ☐

### **Employees Review Results:**

Proposer has previously provided services to CSCF, or other similar government funded programs?

Yes ☐ No ☐

If yes, employees will prepare a statement to indicate past program performance, cost, and note any outstanding issues. All outstanding issues must be resolved prior to consideration of a new contract.

Yes ☐ No ☐

References were contacted by CSRC's employees, and the information indicates the provider is capable of delivering the services requested?

Yes ☐ No ☐

**FORWARD TO THE RATING COMMITTEE**

**Yes ☐ No ☐**

Technical Review Completed by: \_\_\_\_\_

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

## F. RATING SHEET FOR RFP-CSCF-25-OSO-01

PROPOSER: \_\_\_\_\_

DATE RATED: \_\_\_\_\_ SCORE: \_\_\_\_\_ RANK: \_\_\_\_\_

**SCORING:**      *Total Possible Score: 120*

**Raters:** Evaluate each of the following areas and record your response (score) in the blank provided at the end of each question or statement. Explain your evaluation in the Comments.

### **RATING CRITERIA** **SCORE**

1.      The entity demonstrates an understanding of the workforce system and the role of the One-Stop Operator as defined by WIOA.

\_\_\_\_\_

More Than Adequate ..... Not Adequate  
20                                  15                                  10                                  5                                  0

Comments: \_\_\_\_\_

\_\_\_\_\_

2.      The entity has contracted to provide services similar in nature and complexity.

\_\_\_\_\_

Experienced.....No Experience  
10                                  8                                  5                                  3                                  0

Comments: \_\_\_\_\_

\_\_\_\_\_

3.      The entity has previous experience building relationships among stakeholders to achieve objectives.

\_\_\_\_\_

Experienced ..... No Experience

20                                  15                                  10                                  5                                  0

Comments: \_\_\_\_\_

\_\_\_\_\_

---

Comments: \_\_\_\_\_

Total: \_\_\_\_\_

.....

---

Comments: \_\_\_\_\_

.....

---

Comments: \_\_\_\_\_

---



Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- d. Assure the local One-Stop System has at least one comprehensive One-Stop Career Center that meets the required certification criteria and is compliant with State and Federal regulations.

.....

5	3	0
---	---	---

\_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_

- e. Remain informed on relevant information in order to monitor CSCF One-Stop System's Compliance and performance.

.....

5	3	0
---	---	---

\_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- f. Coordinate and communicate with all designated partners and CSCF to share information, discuss strategies to positively impact employment outcomes for shared clients, and problem-solve collaboration issues.

.....

5	3	0
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\_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_

6. Conduct, up to, four (4) site visits of the Comprehensive One-Stop Career Center during each Program Year, July 1<sup>st</sup> through June 30<sup>th</sup>. These visits will include interviews with CSCF Management as well as the representatives of the required partner agencies.

\_\_\_\_\_

Capable/Competent.....Not Capable/Competent

20                                      15                                      10                                      5                                      0

Comments: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

***TOTAL ALL POINTS (Add scores 1-6):*** \_\_\_\_\_

**(Total)**

**RATED BY:** \_\_\_\_\_

**Signature**

Other comments or concerns: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



August 1, 2025

Dear Provider:

On behalf of The Central Florida Regional Workforce Development Board, Inc. d/b/a CareerSource Central Florida (CSCF), the Workforce Development Board of Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) is seeking proposals for a One-Stop Operator 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.

This request is for the purpose of contracting with a One Stop Operator. The One-Stop Operator's major function, in a consultant role, will be the coordination of the service delivery among the required One-Stop Partners and their programs. Responses to this RFP are to be used to determine the best-qualified proposer and will be the basis for negotiating a contract. The contract, if awarded, will be a term of four (4) years as a one (1) year contract to be renewed annually based upon performance. Annual renewal will be the option of CSCF and its Board of Directors.

Instructions for submitting proposals are included in the Request for Proposal (RFP). The RFP may be accessed through the CSCF's website at <https://www.careersourcecentralflorida.com/about-us/work-with-us/>.

Provider(s) must complete the RFP package as instructed and submit it by **5:00 p.m. on Friday, August 22, 2025**. All questions must be submitted by **Friday, August 15, 2025**, and will be posted on the CSCF website <https://www.careersourcecentralflorida.com/about-us/work-with-us/>. Answers to all questions received will be posted to the webpage within two business days.

This request for proposal does not obligate the CSCF Board of Directors to award a contract or contracts, nor will CSRC or CSCF pay any costs incurred in the preparation of proposals. CSRC reserves the right to accept or reject any or all proposals received.

We look forward to hearing from you.

Sincerely,

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

# Statement of Work (SOW)

---

One-Stop Operator - CareerSource Central Florida (\$20,000 budget)

Board meeting – Sept. 25

Executive – Sept. 17

Career Services committee – Sept 11

RFP submissions due – August 29<sup>th</sup>

RFP q/a due – Aug 22<sup>nd</sup>

Release/Post RFP – Friday August 1st

## I. Purpose

This Statement of Work (SOW) establishes the expectations, responsibilities, and deliverables for the One-Stop Operator (“Operator”) for CareerSource Central Florida (CSCF). The Operator, serving in a consultative and coordination role, will support the local workforce system in aligning and optimizing services across partners to achieve CSCF’s service delivery vision and performance goals.

## II. Scope of Work

The Operator shall provide all services necessary to fulfill the requirements outlined in this SOW. The Operator is responsible for reviewing and understanding all specifications and conditions that may impact service delivery. No allowances will be granted for lack of knowledge of such conditions, and the selected respondent will not be relieved of any liabilities or obligations.

The Operator will perform the following core functions:

### A. Memorandum of Understanding (MOU) Management

1. Develop, review, and monitor MOUs between CSCF and one-stop partners for the operation of the one-stop delivery system:

- A. Content Requirements: Ensure MOUs comply with federal and state requirements.
- B. Service Coordination: Define how services will be coordinated and delivered.
- C. Funding Provisions: Detail funding mechanisms for services and system operating costs.
- D. Referral Processes: Establish referral methods between the Operator and one-stop partners.

- E. Accessibility: Address the needs of workers, youth, individuals with barriers to employment, and individuals with disabilities, ensuring access to technology and materials.
- F. Review Periods: Define MOU duration and amendment procedures, with a minimum review every three (3) years.
- G. Other Provisions: Include additional provisions as determined appropriate by all parties.

## **B. Continuous Improvement of One-Stop Centers**

### **2. Facilitate Partner Collaboration:**

- A. Coordinate and conduct up to four (4) meetings annually with one-stop partners to support MOU implementation.
- B. Develop meeting agendas (in coordination with CSCF staff), facilitate discussions, and prepare/distribute meeting notes.

### **3. Evaluate Accessibility and Effectiveness:**

- A. Establish objective criteria and procedures to assess effectiveness, physical accessibility, and programmatic accessibility in compliance with WIOA Section 188 and the Americans with Disabilities Act (ADA).

### **4. Promote Technological and Service Delivery Enhancements:**

- A. Develop strategies for technological improvements to enhance access and service quality, including:
- B. Digital literacy skill development.
- C. Accelerating attainment of skills and postsecondary credentials.
- D. Strengthening professional development for workforce providers.
- E. Ensuring accessibility of technology for individuals with disabilities.

### **5. Improve Coordination Across Partner Programs:**

- A. Design and implement strategies for enhanced coordination across programs, including:
- B. Common intake processes.
- C. Data collection and reporting systems.
- D. Performance measurement mechanisms.

## **C. Reporting Requirements**

### **6. Quarterly Reports:**

- A. In collaboration with CSCF staff, develop a mechanism to report on partnership progress and system performance.
- B. Present quarterly reports to the Workforce Development Board.

- C. Ensure reports align with CSCF meeting requirements and formats.

### **III. Excluded Services**

Per WIOA regulations and CSCF policies, the One-Stop Operator shall not provide direct career services as defined in WIOA Sec. 134(c)(2), including but not limited to:

- Eligibility determination.
- Outreach, intake, and orientation.
- Skills assessment and support service needs.
- Labor exchange and business services.
- Referrals and coordination with other programs.
- Provision of labor market and performance information.
- Assistance with filing claims for Reemployment Assistance.
- Financial aid eligibility support.
- Follow-up services.

The Operator is also prohibited from performing the following functions:

- Convening system stakeholders for local plan development.
- Preparing or submitting local plans.
- Oversight of itself.
- Managing or participating in the competitive selection process for one-stop operators.
- Selecting or terminating one-stop operators, career service providers, or youth providers.
- Negotiating local performance accountability measures.
- Developing and submitting budgets for Local WDB activities.

### **IV. Performance Standards**

- Adhere to all federal, state, and local regulations.
- Demonstrate responsiveness to CSCF and partner needs.
- Ensure timely delivery of all reports and deliverables.
- Maintain confidentiality of participant and system data.



- Comply with all applicable laws and regulations, including but not limited to:
- Workforce Innovation and Opportunity Act (WIOA).
- Americans with Disabilities Act (ADA).
- Equal Employment Opportunity (EEO) and nondiscrimination provisions (29 CFR Part 38).
- Uniform Administrative Requirements, Cost Principles, and Audit Requirements (2 CFR Part 200).
- Florida Sunshine Law and Public Records Act.

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

## **Consent Item 6**

### **CAREERSOURCE NORTH CENTRAL FLORIDA REQUEST FOR NEW DESIGNATION OF LOCAL AREA**

Under the Workforce Innovation and Opportunity Act (Pub. L. 113-128), the Governor must designate local workforce development areas (LWDAs) after consultation with the state workforce board (state board), chief local elected officials (CLEOs) and local workforce development boards (LWDBs). The purpose of the LWDA is to serve as the jurisdiction for the administration of workforce development activities using Adult, Dislocated Worker, and Youth funds allocated by the Florida Department of Commerce (FloridaCommerce) and to coordinate efforts related to the other core programs at a community level.

The Governor may approve a request at any time for designation as a LWDA from any unit of local government, including a combination of such units, if the state board recommends designation after determining that the area:

- Is consistent with the local labor market area;
- Has a common economic development area; and
- Has the federal and non-federal resources available to the proposed LWDA, including appropriate education and training institutions, to administer activities under the WIOA youth, adult, and dislocated worker formula programs.

As part of the Florida Workforce System Transportation Plan approved by the Governor, 21 local workforce development areas were designated for the state of Florida. This included the consolidation of CareerSource North Central Florida and CareerSource Florida Crown into a single LWDA and CareerSource North Central Florida (LWDB 26)

On June 18, 2024, the CareerSource Florida Board of Directors conditionally approved six LWDBs contingent upon receipt of additional information or approval signatures. CareerSource North Central Florida was conditionally approved pending signatures from the Chief Local Elected Officials in the LWDA. As of July 2025, CareerSource North Central Florida has obtained the required signatures.

The Florida Department of Commerce reviewed the documentation submitted for the LWDB's submission to request new designation of a local area as described in WIOA

Sections 106-107 and [Workforce Policy 094 – Local Workforce Development Area Designation](#).

Florida Commerce and CareerSource Florida reviewed CareerSource North Central's performance as part of the request for designation as a LWDA. As referenced in supporting documents, prior to consolidation for Program Year (PY) 2023-2024, Columbia, Dixie, Gilchrist, and Union counties achieved 11 adjusted performance targets, and Alachua and Bradford counties achieved 12 adjusted performance targets. Post consolidation, CareerSource North Central Florida achieved or exceeded the state average for 17 of its negotiated performance targets for Program Year 2024-2025. Letter grades are assigned to LWDBs annually by October 15, following the close of each program year. CareerSource North Central Florida currently holds a B+ score for its PY 2024-2025 performance.

FloridaCommerce and CareerSource Florida recommend full approval of the LWDB's request for new designation as a local area.

## **FOR CONSIDERATION**

- **Approve new local area designation request for CareerSource North Central Florida starting October 1, 2024, through June 30, 2026.**

### **Supporting Documents**

- CareerSource North Central Florida request for new area designation of CareerSource North Central Florida (LWDB 26).

## REQUEST FOR NEW DESIGNATION OF LOCAL AREAS

Under the Workforce Innovation and Opportunity Act (Pub. L. 113-128), the Governor must designate local workforce development areas after consultation with the state workforce board (state board), chief local elected officials (CLEO) and local workforce development boards (LWDBs). The purpose of the local workforce development area is to serve as the jurisdiction for the administration of workforce development activities using Adult, Dislocated Worker and Youth funds allocated by the Florida Department of Commerce (FloridaCommerce) and to coordinate efforts related to the other core programs at a community level.

The Governor may approve a request at any time for designation as a local workforce development area (LWDA) from any unit of local government, including a combination of such units, if the state board recommends designation after determining that the area:

- Is consistent with the local labor market area;
- Has a common economic development area; and
- Has the federal and non-federal resources available to the proposed LWDA, including appropriate education and training institutions, to administer activities under the WIOA youth, adult, and dislocated worker formula programs.

The Florida Department of Commerce reviewed the local workforce development boards' submission to request new designation of a local area as described in Public Law 113-128, Chapter 2, Sections 106-107 and [Administrative Policy 094 – Local Workforce Development Area Designation](#).

### FOR CONSIDERATION

Approve new local area designation request (previously conditionally certified) for the following local workforce development board starting October 1, 2024 through June 30, 2026.

CareerSource North Central Florida, LWDB 26

LWDB26 Area Designation\_.pdf

## Request for New Local Workforce Development Area Designation

Select the appropriate box that describes this request:

☒ New Designation New Local Workforce Development Area (LWDA), including LWDAs that are fully consolidating.

☐ Realignment of Counties – Existing LWDA that is removing or adding one or more counties.

### 1. Point of Contact

Name of Contact Person:

Phyllis Marty

Phone Number:

352-681-3320

Title:

Chief Executive Officer

Email Address: pmarty@careersourcencfl.com

Date of Request:

May 1, 2024

### 2. LWDA Information

Name of Local Workforce Development Area:

CareerSource North Central Florida

### 3. County/Counties Information

List the county/counties that will be included in the proposed LWDA:

Alachua, Bradford, Columbia, Dixie, Gilchrist and Union

For new designations and realignment of counties, list the county/counties that is/are being added to the LWDA and the LWDA they are currently designated to:

Columbia, Dixie, Gilchrist and Union are currently LWDB 7, Alachua and Bradford are LWDB 9

For realignment of counties, list the county/ counties that is/are being removed from the LWDA and the LWDA they will be realigned to:

### 4. Substantive Requirements for Designation of a New LWDA

a. Describe how the proposed LWDA is consistent with local labor market areas.

Bradford, Dixie, Gilchrist, Union, and Columbia Counties are contiguous with each other and are part of the North Central Florida Regional Planning Council and a part of the larger Metropolitan Transportation Planning Organization for the Gainesville Urbanized Area. As such the counties have worked together on various projects related to improving the quality of life for their residents and citizens. The economies of Alachua, Columbia, Bradford, Gilchrist, Dixie & Union Counties employ almost 200,000 people. The largest industries in the 6-county area are Educational Services, Health Care & Social Assistance, Retail Trade, General medical and surgical hospitals and Restaurants & Food Services. The counties have also exhibited similar growth patterns since 2020 to 2021,



employment in Alachua County, FL grew at a rate of 3.78%, and in the neighboring counties by 3.01%. The above information is from the most recent census data.

**b. Describe how the proposed LWDA has a common economic development area.**

All six of these counties are within the same Enterprise Florida Region, which is the North Central region. Dixie, Columbia, Union, Gilchrist, Bradford, and Alachua counties are all within the North Central Regional Planning Council region.

**c. Describe the federal and non-federal resources that will be available to the proposed LWDA, including appropriate education and training institutions, to administer activities under the Workforce Innovation and Opportunity Act youth, adult and dislocated worker formula programs.**

Once the consolidation is complete the newly dedicated Local Area 26 will apply for both federal and non-federal grants to support its programs. In addition to Florida Gateway College and Santa Fe Colleges providing degreed programs, technical certifications and Adult Basic Education, the local area will work with the REACH Office to increase options available to the population of the local area and increase programs on the local Eligible Training Provider List. To the extent funds are sufficient to serve in school youth the local area will engage with each of the school districts in the newly formed local area.

**5. Additional Information**

**a. Describe how the proposed new LWDA designation will impact the other LWDA(s) from which it is withdrawing.**

Some but not all of the impacts are as follows: (1) The consolidation will merge Areas 7 and 9. The two areas will each benefit as a single governance structure which will result in savings that will translate into services to additional participants. (2) The merger will also assist in the new area being better able to meet the performance measures than either area on its own, as increased enrollments will result in increased exits. As a result, less weight will be given to any individual exit. This will have an overall positive impact on the performance measures' formula calculations.

**6. Public Comments**


**a. Local areas requesting to create a new LWDA must post its intent for 10 days to allow the receipt of public comments. Was this request posted for public comments?** ☐ Yes ☒ No

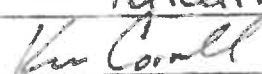
**b. Were any public comments received?** ☐ Yes ☒ No

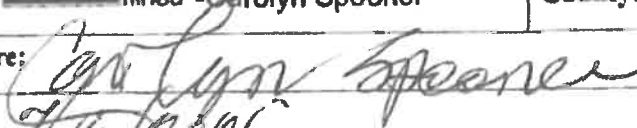
If yes, a copy of public comments received regarding the proposed newly designated LWDA must be submitted with this request.


## CERTIFICATION AND APPROVAL OF REQUEST

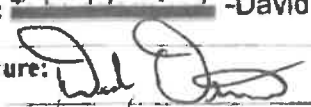
By signing below, the local workforce development board chairperson and the chief local elected official (CLEO) representing each county/unit of local government that comprises the proposed local workforce development area certify that the information contained in this request is true and accurate based on their knowledge. Additionally, the signatures below demonstrate the consensus of each county/unit of local government involved.

Local Workforce Development Board Chairperson	
Name: <span style="background-color: black; color: black;">[REDACTED]</span>	Ethan Fieldman
Signature:	
Date:	1/29/25

Chief Local Elected Official	
Name: <span style="background-color: black; color: black;">[REDACTED]</span>	Ken Cornell
County:	Alachua
Signature:	
Date:	1/30/25

Chief Local Elected Official	
Name: <span style="background-color: black; color: black;">[REDACTED]</span>	nined - Carolyn Spooner
County:	Bradford
Signature:	
Date:	7/15/2025

Chief Local Elected Official	
Name: <span style="background-color: black; color: black;">[REDACTED]</span>	-Robby Hollingsworth
County:	Columbia
Signature:	
Date:	7-17-2025

Chief Local Elected Official	
Name: <span style="background-color: black; color: black;">[REDACTED]</span>	-David O'Steen
County:	Dixie
Signature:	
Date:	7/24/2025

**Date:**

Chief Local Elected Official	
<b>Name:</b> [REDACTED] -Sharon Langford	<b>County:</b> Gilchrist
<b>Signature:</b> Sharon Langford	
<b>Date:</b> 7-17-2025	

Chief Local Elected Official	
<b>Name:</b> [REDACTED] -Mac Johns	<b>County:</b> Union
<b>Signature:</b> Mac Johns	
<b>Date:</b> 7-23-2025	

A certification page is required for each of the impacted local workforce development areas. The completed request and certification page(s) must be submitted to: [LWDBGovernance@commerce.fl.gov](mailto:LWDBGovernance@commerce.fl.gov).

#27

June 21, 2024

2:00 pm

CareerSource North Central Florida

1112 N Main St, Gainesville, FL 32601

Pages

**1. Call to Order**

**2. Approval of the Agenda**

**3. Approval of Minutes**

1

Approval of the minutes from the April 10, 2024, Joint Board and Council Meeting.

**4. Public Comment**

**5. Old Business**

**5.1 Update on Consolidation of Regions 7 and 9**

CareerSource North Central Florida (CSNCFL) and County staff have been working with the state mediators as well as directly with CareerSource Florida on the steps necessary for the consolidation of Regions 7 and 9 into a new Region 26. The first step in the process is for each of the counties in the new region to enter into an Interlocal Agreement to determine the chief elected official for the region, the manner in which liability shall be divided amongst the counties, as well as other matters assigned to the elected officials under the Workforce Innovation and Opportunity Act (WIOA). Discussions regarding the terms and conditions of the Interlocal Agreement are still ongoing as of the posting of the agenda. Ms. Marty will provide any updates occurring in the interim.

***Action: None***

***Recommendation: Discussion***

***Exhibit: None***

**6. New Business**

**Minutes of April 10, 2024 North Central Florida Workforce Development Board  
and Dual County Workforce Development Council Joint Meeting**

***The meeting was held at 3:00 pm***

**Council Members in attendance:** Commissioner Mary Alford, Commissioner Charles Chestnut, Commissioner Ken Cornell and Commissioner Carolyn Spooner

**Board Members in attendance:** Charles Harris, Christopher Coffey, Dante Buckley, James Ingle, Jeffrey Tate, Keith Kirby, Kevin Shupe, Landon Harrar, Paul Broadie, Shawn Graves, and Staci Bertrand.

**Staff in attendance:** Anna Mendoza, Brixton Yorker, Erika Howard, Kelli Hutchins, Phyllis Marty, and Rochelle Daniels (Board Counsel).

**Guests in attendance:** Alexander Ganz, Anuj Kapadia, Bethany Gaffey, Dave Forziano, Garrick Wright, Gina Peebles, Julia Alford, Logan Grubb, Sam Stewart, Stew Lilker, Tameka Austin, and Todd Hutchison

**Chair Alford called the meeting to order at 3:15 pm.**

**Approval of Agenda.** **Jeffrey Tate** made a motion to approve the agenda. **Charles Harris** seconded the motion. The motion carried. **Commissioner Cornell** made a motion to approve the agenda. **Commissioner Chestnut** seconded the motion. The motion carried. *There was no further discussion.*

**Approval of Minutes.** **Commissioner Cornell** made a motion to approve the minutes from February 15, 2024 Joint Board and Council Meeting. **Commissioner Chestnut** seconded the motion. The motion carried. *There was no further discussion.*

**Public Comments.** *There were no public comments.*

**New Business 1:** Phyllis Marty presented Florida Commerce's request for LWDB 9 to act as Fiscal Agent for LWDB 7. Commissioner Cornell and Todd Hutchison discussed concerns about the timeline in relation to ongoing Consolidation efforts. Dave Forziano gave an update on progress of the draft Interlocal Agreement. **Commissioner Cornell** made a motion to approve staff's recommendation of notifying the state that LWDB 9 stands ready to assume the duties of Fiscal Agent and Administrative Entity for the new consolidated workforce region effective on or after July 1, 2024. **Commissioner Spooner** seconded the motion. The motion carried. *There was no further discussion.*

**New Business 2:** Phyllis Marty presented a request for subsequent designation of the current Alachua and Bradford Counties' workforce development area for approval. **Jeffrey Tate** made a motion to approve submission of the request for subsequent designation. **James Ingle** seconded the motion. The motion carried. **Commissioner Cornell** made a motion to approve submission of the request for subsequent

designation. **Commissioner Chestnut** seconded the motion. The motion carried. *There was no further discussion.*

**New Business 3:** Phyllis Marty presented a contract for board legal services with Rochelle Daniels. **Commissioner Cornell** praised Ms. Daniels work and expertise while serving as current Board Counsel. **Jeffrey Tate** made a motion to approve the contract for legal services. **Dante Buckley** seconded the motion. The motion carried. **Commissioner Cornell** made a motion to approve submission of the request for subsequent designation. **Commissioner Chestnut** seconded the motion. The motion carried. *There was no further discussion.*

**Reports:** Phyllis Marty distributed a draft Interlocal Agreement, a draft EO Monitoring Report, a programmatic monitoring update, and a calendar of upcoming board and committee meeting dates for informational purposes. *There was no further discussion.*

**Matters from the Board/Council.** *There were no matters from the floor.*

**Matters from the Floor.** *There were no matters from the floor.*

**Adjournment.** There being no further comments, the meeting adjourned at 3:51 pm



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

## Consent Item 7

### **CAREERSOURCE SOUTH FLORIDA REQUEST FOR APPROVAL OF LOCAL BOARD COMPOSITION AND CERTIFICATION**

Once every two years, one local workforce development board (LWDB) must be certified for each local area in the state, based on the local board membership requirements described in Workforce Innovation and Opportunity Act (WIOA) sec. 107(b) and [20 CFR 679.320](#). [Section 445.004\(11\), Florida Statutes](#) (F.S.), requires the state board, in consultation with the Florida Department of Commerce (FloridaCommerce), to ensure that LWDBs have membership consistent with the requirements of federal and state law. For a second or subsequent certification, the certification must also be based on the extent to which the local area ensures workforce investment activities carried out in the local area enabled the local area to meet the corresponding performance accountability measures and achieve fiscal integrity as defined in WIOA sec. 106(e)(2).

[CareerSource Florida Workforce Policy 091 – Local Workforce Development Board Composition and Certification](#), provides LWDBs the requirements for LWDB membership composition under WIOA and Chapter 445, F.S., and the process for certification of LWDBs.

In June 2024, the CareerSource Florida Board of Directors conditionally approved nine local boards contingent upon approval signatures and/or appointment of private education providers to the LWDB. As evidenced in the attachments, CareerSource South Florida (LWDB 23) provided documentation of compliance with [Section 445.007\(15\), Florida Statutes](#) and [Workforce Policy 110 – Local Workforce Development Area and Board Governance](#) to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. FloridaCommerce reviewed and confirmed the LWDB's compliance with the requirement to develop an Education and Industry Consortium.

FloridaCommerce and CareerSource Florida reviewed CareerSource South Florida's request for board certification and other information provided. As referenced in supporting documents, CareerSource South Florida achieved or exceeded 16 of the state's adjusted performance targets for Program Year (PY) 2023-2024 and 18 negotiated performance targets for PY 2024-2025. Letter grades are assigned to local workforce development

boards annually by October 15, following the close of each program year. CareerSource South Florida currently holds an A+ score for its PY 2024-2025 performance.

CareerSource Florida and FloridaCommerce recommend CareerSource South Florida for certification because the LWDB meets necessary requirements.

## **FOR CONSIDERATION**

- **Certify CareerSource South Florida for the period June 18, 2024, to June 30, 2026, for meeting statutory and policy requirements related to board composition.**

Attachments:

- CareerSource South Florida (LWDB 23) Review Checklist
- CareerSource South Florida Board of Directors Roster
- CareerSource South Florida Education and Industry Consortium Roster

### Checklist for WIOA AP 91 Local Workforce Development Board Composition and Certification

**LWDB Number:** 23      **LWDB Name:** CareerSource South Florida

**Request Reviewed By:** Lonnie Saunders

**Recommended for Approval?**   X Yes   No

**Review Date:** 07/15/2025

<u>Requirement</u>	<u>Page</u>	<u>Yes/No</u>
1. Did the LWDB submit board composition documentation?	Roster	Yes
2. Does the majority of the board consist of members from the local area who represent businesses in the local area who:	4/2025 Monitoring	Yes
a) Are owners of a business, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;	4/2025 Monitoring	Yes
b) Represent businesses, including small businesses, or organizations representing businesses that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the local area (at least two representatives of small businesses must be included); and	4/2025 Monitoring	Yes
c) Are appointed from individuals nominated by local business organizations and business trade associations.	4/2025 Monitoring	Yes
d) Are not current members of the local area's Education and Industry Consortium as defined by CareerSource Florida's Strategic Policy 2023.09.19.A.2.	4/2025	Yes
3. The LWDB has board members that consist of not less than 20 percent of the members must be representatives of the workforce within the local area who:	April 2025 Monitoring tool	Yes
a) Include at least two representatives of labor organizations nominated by local labor federations. For a local area in which no employees are represented by such organizations, at least two other representatives of employees will be included.	April 2025 Monitoring tool	Yes
b) Include at least one representative of a labor organization or a training director from a joint labor-management apprenticeship program. If no union affiliated registered apprenticeship programs exist in the area, a representative of a nonunion affiliated registered apprenticeship program must be appointed, if one exists.	April 2025 Monitoring tool	Yes
c) May include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or provide/support competitive integrated employment for individuals with disabilities.	April 2025 Monitoring tool	Yes
d) May include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives or organizations that serve out-of-school youth.	April 2025 Monitoring tool	Yes

4.	Each local board must include representatives of entities administering education and training activities in the local area who:	4/2025 Monitoring	Yes
a)	Include a representative of eligible providers administering adult education and literacy activities under Title II of WIOA	4/2025 Monitoring	Yes
b)	Include a representative of institutions of higher education providing workforce investment activities (including community colleges).	Roster	Yes
c)	Include a private education provider, if a public education or training provider is represented on the LWDB. LWDBs can search local private education providers on the Florida Department of Education website Commission for Independent Education (fldoe.org). The state board may waive this requirement if requested by a LWDB if it is demonstrated that such representative does not exist in the local area.	Roster	Yes
d)	May include representatives of local educational agencies and of community- based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment.	4/2025 Monitoring	Yes
e)	Are not current members of the local area's Education and Industry Consortium as defined by CareerSource Florida Policy 2023.09.19.A.2.	4/2025 Monitoring	Yes
f)	When there is more than one institution in each of the types of educational entities listed above, nominations are solicited from representatives of each of these entities.	Roster and Monitoring tool 4/2025.	Yes
g)	LWDBs requesting to waive the requirement for private education provider representation on the board must demonstrate that such a provider does not exist in the local area and/or is not willing to serve on the board. The LWDB will describe, in a locally defined process, how private education providers will be identified, and efforts taken to include those representatives on the LWDB. If through the locally defined process the LWDB finds that a private education provider representative of an entity administering education and training activities in the local area does not exist or is not willing to serve on the board, the LWDB must submit a Private Education Provider Waiver Request Form (Attachment A) to: LWDBGovernance@commerce.fl.gov. The request must include a copy of the locally defined process used to identify private education providers and the results of the LWDB's efforts to include those representatives on the LWDB in its request.		N/a
5.	Each local board must include representatives of economic and community development as well as governmental entities serving the local area who:	4/2025 Monitoring tool	Yes
a)	Represent economic and community development entities serving the local area.	4/2025 Monitoring tool	Yes
b)	Represent Vocational Rehabilitation serving the local area.	Monitoring roster	Yes

c) May represent agencies or entities serving the local area relating to transportation, housing, and public assistance.	4/2025 Monitoring	Yes
d) May represent philanthropic organizations serving the local area.	4/2025 Monitoring	Yes
6. Does the local board have individuals or representatives of entities that were determined by the Chief Elected Official in the local areas to be appropriate? (optional)	N/a	N/a
7. Does the LWDB have members who were appointed to the local board to serve as representatives of more than one entity if the individual meets all the criteria for representation?	Monitoring Roster	Yes
8. Is the Chairperson elected by members of the LWDB and a member of the business sector?	Monitoring Roster	Yes
9. Did the local board submit membership of standing committees including education and industry consortium(s).	April 2025 Monitoring	Yes
10. Do the local board members have optimum policymaking authority within the organizations, agencies or entities they represent?	Roster, April 2025 Monitoring	Yes
11. Is the application material signed by each CLEO or Consortium Chair?		Yes
12. Is the application signed by the board Chair?		Yes

\_\_\_\_\_  
Supervisor Approval

Date





# CareerSource South Florida GMCC EDUCATION AND INDUSTRY CONSORTIUM ROSTER

## GENERAL INFORMATION

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

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

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

### Industry Representative Requirements:

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

### Education Representative Requirements:

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

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

To contact a member of the committee, please contact Mr. Robert Smith at CareerSource South Florida at [robert.smith2@careersourcesfl.com](mailto:robert.smith2@careersourcesfl.com) or 305-929-1540.

Name	Organization	Term Start Date	Term End Date
Adam Brinson	Junior Achievement of Miami	1/1/2025	12/31/2026
Alanka Brown	Miami Dade College	1/1/2025	12/31/2026
Alex Herrera	St Thomas University	1/1/2025	12/31/2026
Alex Paz	Chapman Partnership	1/1/2025	12/31/2026
Alex Rhodes	Grant Thornton	1/1/2025	12/31/2026
Amanda Gorski	The Children's Trust	1/1/2025	12/31/2026
Angela Ramos	Univision	1/1/2025	12/31/2026
Angelica Santibanez	Amazon	1/1/2025	12/31/2026
Anthony Rionda	Florida International University	1/1/2025	12/31/2026
Arlene Buchanan	Northeastern University	1/1/2025	12/31/2026
Ashlee Wright	WOT Inc	1/1/2025	12/31/2026
Bryan Stewart	Miami Dade College	1/1/2025	12/31/2026
Carlos Lamourtte	Banesco	1/1/2025	12/31/2026
Claudia Giardinella	Americans for Immigrant Justice	1/1/2025	12/31/2026
Claudia Uribe	Miami Dade County	1/1/2025	12/31/2026
Connie Laguna	Miami Dade College	1/1/2025	12/31/2026
Cynthia Sewell	Gang Alternatives	1/1/2025	12/31/2026
Daniel Armstrong	Early Learning Coalition	1/1/2025	12/31/2026
Danielle Barreras	The Children's Trust	1/1/2025	12/31/2026
Diana Valdivia	CareerSource South Florida	1/1/2025	12/31/2026
Dr. Alexia Rolle	Miami Dade College	1/1/2025	12/31/2026
Dr. Beatriz Gonzalez	Miami Dade College	1/1/2025	12/31/2026
Dr. Willie Logan	Early Learning Coalition	1/1/2025	12/31/2026
El pagnier K Hudson	Florida International University	1/1/2025	12/31/2026
Emily Gonzalez	United Way Miami	1/1/2025	12/31/2026
Erbi Blanco-True	Banesco	1/1/2025	12/31/2026
Fermin Vazquez	Miami Dade College	1/1/2025	12/31/2026
Ferran Calatayud	Broward International University	1/1/2025	12/31/2026
Francisco J Cantero	FPL	1/1/2025	12/31/2026
J.J. Myers	Barry University	1/1/2025	12/31/2026
Jasmin Grant	Baptist Health	1/1/2025	12/31/2026
Jeremy Bergthold	Claro	1/1/2025	12/31/2026
Jocelyn Armand	Legal Service of Miami	1/1/2025	12/31/2026
Jorge Rodriguez	Miami Dade County	1/1/2025	12/31/2026
Jose Fernandez	Solvo Global	1/1/2025	12/31/2026
Jose Acosta	Chenmoore	1/1/2025	12/31/2026
Jose Manuel Diaz	Compass-Office	1/1/2025	12/31/2026
Karen Velazquez-Vargas	City Year	1/1/2025	12/31/2026
Karla Hernandez Mats	Balsera Communications	1/1/2025	12/31/2026
Katelyn Pounds	Salvation Army	1/1/2025	12/31/2026
Katherine Connell	Cristo rey Miami	1/1/2025	12/31/2026
Linda Barrocas	Junior Achievement of Miami	1/1/2025	12/31/2026
Linda Lecht	Education Fund	1/1/2025	12/31/2026
Lisa Martinez	LM Genuine Solutions	1/1/2025	12/31/2026
Lisa Thurber	Miami Dade County Public Schools	1/1/2025	12/31/2026
Luis Llerena	CBT	1/1/2025	12/31/2026
Malou Harrison	Miami Dade College	1/1/2025	12/31/2026
Mariana Furchi Sly	Junior Achievement of Miami	1/1/2025	12/31/2026
Marilen Marnett	Education Fund	1/1/2025	12/31/2026
Maurice Woods	South Florida Easterseals	1/1/2025	12/31/2026
Max Miguel	Adapt ai	1/1/2025	12/31/2026
Mercy Castiglione	Early Learning Coalition	1/1/2025	12/31/2026
Michael Roman	City of Miami	1/1/2025	12/31/2026
Miriam Singer	Jewish Community Services of South Florida	1/1/2025	12/31/2026
Miya Burt-Stewart	Atlantis University	1/1/2025	12/31/2026
Mr Ken Finneran	Emed	1/1/2025	12/31/2026
Mr. Angel Burgos	Florida International University	1/1/2025	12/31/2026
Mrs. Gepsie Metellus	Santla	1/1/2025	12/31/2026
Ms. Sandra P Gonzalez	Elcmdm	1/1/2025	12/31/2026
Natalia Zea	The Children's Trust	1/1/2025	12/31/2026
PeterRodriguez	Peter Rodriguez	1/1/2025	12/31/2026
Rene Mantilla	Miami Dade County Public Schools	1/1/2025	12/31/2026
Richard Sixto Jr	Blue Missions	1/1/2025	12/31/2026
Robert Sellers	City of Miami	1/1/2025	12/31/2026
Rocio Velazquez	Childrens Movement Florida	1/1/2025	12/31/2026
Rolando Masferrer	Northwestern University	1/1/2025	12/31/2026
Samantha Impellizeri	Paradox Museum	1/1/2025	12/31/2026
Sandra Bermudez	Lucy Project	1/1/2025	12/31/2026
Sarah Brazier	Liberty Academy Daycare & Preschool	1/1/2025	12/31/2026
Saurabh Agrawal	Paktolus	1/1/2025	12/31/2026
Sherry Thompson Giordano	Pace Center	1/1/2025	12/31/2026
Tabitha Fazzino	Miami Dade County Public Schools	1/1/2025	12/31/2026
Tania Valenzuela	GMCC	1/1/2025	12/31/2026
Tiffani Malvin	Barry University	1/1/2025	12/31/2026
Tyler Od'Neal	United Way Miami	1/1/2025	12/31/2026

Tyrone Gabriel	Stemtree	1/1/2025	12/31/2026
Vanessa Valle	Junior Achievement of Miami	1/1/2025	12/31/2026
Vero Korbenfeld	Womens Fund Mmiami	1/1/2025	12/31/2026
Victor Caballero	Early Learning Coalition	1/1/2025	12/31/2026
Victoria Brown	Junior Achievement of Miami	1/1/2025	12/31/2026
William Berenson	Paktolus	1/1/2025	12/31/2026
William Porro	Miami Dade County	1/1/2025	12/31/2026
Yvonne Gonzalez	Northwestern University	1/1/2025	12/31/2026
Zoila Deyurre Fatemian	Miami Dade College	1/1/2025	12/31/2026
Zuanel Diaz	Baptist Health	1/1/2025	12/31/2026

# WIOA Indicator Score Assessment Dashboard



## PY 2023 LWDB Assessment Overview For the Adult Customer Group



References	Overall Performance	LWDB Indicator Scores	Rankings	Historical Demographics	Historical Performance
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View Chart Type  
Text

LWDB  
23

Color Legend  
 At or Above Threshold  
 Below Threshold

Lwdb	Measure	Adult	DW	Youth	WP
23	EERQ2	89.47 %	89.13 %	75.74 %	71.28 %
	EERQ4	77.60 %	79.49 %	78.13 %	69.88 %
	MedWg	\$ 9210	\$ 10718	\$ 4732	\$ 7667
	CredAtt	88.61 %	96.55 %	59.84 %	
	MSG	99.06 %	97.58 %	90.77 %	

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

## Consent Item 8

### CAREERSOURCE GULF COAST 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 operator, 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 Workforce 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.

The Florida Department of Commerce (FloridaCommerce) received a request from CareerSource Gulf Coast (LWDB 4) to serve as one-stop operator.

CareerSource Research Coast published a Request for Proposals on May 5, 2025, for CareerSource Gulf Coast's one-stop operator. The deadline for proposals was May 30, 2025. CareerSource Gulf Coast was the only entity that submitted a proposal. The response was reviewed and rated based on the criteria outlined in the RFP. CareerSource Research Coast submitted an advisement letter to CareerSource Gulf Coast on June 6, 2025. On June 10, 2025, CareerSource Gulf Coast's Executive Committee approved the recommendation of CareerSource Research Coast for CareerSource Gulf Coast to serve as the one-stop operator for LWDB 4 as evidenced in the meeting minutes. Following the approval of the Executive Committee, the Board of Directors was presented the recommendation for one-stop operator and approved the recommendation as shown in the minutes of June 10, 2025. The Chief Elected Officials approved the request as evidenced by their signatures.

Florida Commerce and CareerSource Florida reviewed CareerSource Gulf Coast's

request to serve as a one-stop operator and other information provided. As referenced in supporting documents, although CareerSource Gulf Coast achieved or exceeded the state average for 16 of its adjusted performance targets for Program Year 2023-2024 and 13 of its negotiated performance targets for Program Year 2024-2025, CareerSource Gulf Coast did not meet its negotiated goal for the indicator of performance for Dislocated Worker, Measurable Skill Gains for Program Years 2023 and 2024. Letter grades are assigned to LWDBs annually by October 15, following the close of each program year. CareerSource Gulf Coast currently holds a B- score for its Program Year 2024-2025 performance.

FloridaCommerce confirms the requirements to be designated as the one-stop operator have been sufficiently met.

FloridaCommerce and CareerSource Florida recommend conditional approval for CareerSource Gulf Coast to serve as the one-stop operator effective July 1, 2025, through June 30, 2027, contingent upon improved performance for the indicators of performance for the local area described in sec. 116(b)(2) of WIOA and [20 CFR 677.155](#) including:

- Continued improvement on the Dislocated Worker, Measurable Skill Gains Indicator,
- No significant decline in all other performance indicators; and
- Engagement in quarterly check-in calls with FloridaCommerce and CareerSource Florida.

## **FOR CONSIDERATION**

- **Conditionally approve CareerSource Gulf Coast to serve as one-stop operator for CareerSource Gulf Coast contingent upon:**
  - **Continued improvement on the Dislocated Worker, Measurable Skill Gains Indicator,**
  - **No significant decline in all other performance indicators; and**
  - **Engagement in quarterly check-in calls with FloridaCommerce and CareerSource Florida.**

### **Attachments**

- CareerSource Gulf Coast's request for authorization to serve as the one-stop operator for CareerSource Gulf Coast.

## Checklist For Local Board Requesting To Serve As The One Stop Operator

LWDB Number: 4      LWDB Name: CareerSource Gulf Coast

Request Reviewed By: Tameka Austin

Request Approved? ☒ Yes   ☐ No

Review Date: 07/17/2025

### Temporary Assumption of Duties for Procured and Contracted Services

This request is the result of:

- ☐ Sudden termination of contract  
☒ Failed procurement

#### General

<u>Requirement</u>	<u>Page</u>	<u>Yes/No</u>
1. The request includes documentation evidencing that it has been approved by the board and the CLEO.	P. 4	Yes
2. The request includes the duration for which the board will serve in a temporary capacity as the one-stop operator, not to exceed one year.	p. 4	Yes

#### Sudden Termination of Contract

<u>Requirement</u>	<u>Page</u>	<u>Yes/No</u>
1. A written request was submitted to serve in the role in which the contract was terminated.		
2. The request includes documentation of the original contract and the termination notification, which should include the reason for termination.		
3. The request includes an explanation and an organizational chart showing who will be responsible for assuming the role(s) temporarily.		
4. The explanation and organizational chart clearly illustrates separation of duties; (including but not limited to the temporary removal of duties from certain areas/individuals to allow assumption of the temporary role).		
5. The explanation and organizational chart clearly illustrates firewalls; (including but not limited to restriction from access to any information that may lead to impropriety).		
6. The explanation and organizational chart clearly illustrates conflict of interest requirements.		
7. The request includes a defined length of time in which the LWDB seeks to temporarily serve in the role in which the contract was terminated, not to exceed one year.		

#### Failed Procurement

<u>Requirement</u>	<u>Page</u>	<u>Yes/No</u>
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1. A written request was submitted to serve in the role for which there was a failed procurement.	Email	Yes
2. The request includes a copy of the competitive solicitation (e.g. RFP, IFB, etc.	RFP	Yes
3. The request includes a proof of the announcement medium used (e.g., newspaper, social media, website, email notification to potential bidders).	CSRC Website	Yes
4. The request includes documentation showing how long the announcement was posted.	RFP	Yes
5. The request includes documentation showing that the LWDB has the capacity and ability to perform the one-stop operator functions.	Recommendation letter	Yes
6. The request includes an explanation and an organizational chart showing who will be responsible for assuming the role(s) temporarily.	Org Chart and narrative	Yes
7. The explanation and organizational chart clearly illustrates separation of duties; (including but not limited to the temporary removal of duties from certain areas/individuals to allow assumption of the temporary role).	Conflict of interest policies and Organizational chart	Yes
8. The explanation and organizational chart clearly illustrates firewalls; (including but not limited to restriction from access to any information that may lead to impropriety).	Conflict of interest policies and Organizational chart	Yes
9. The explanation and organizational chart clearly illustrates conflict of interest requirements.	Conflict of interest policies and Organizational chart	Yes

Comments: The CLEOs signed approval for term 7/1/2025-6/30/2029.

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Supervisor Approval

Date

May 5, 2025

Dear Provider:

On behalf of The Gulf Coast Workforce Development Board, Inc. d/b/a CareerSource Gulf Coast (CSGC), the Workforce Development Board of Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) is seeking proposals for a One-Stop Operator 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.

Instructions for submitting proposals are included in the Request for Proposal (RFP). The RFP may be accessed through the CSGC’s website at <https://careersourcegc.com/rfps-notices> .

Provider(s) must complete the RFP package as instructed and submit it by **6:00 p.m. EST on Friday, May 30, 2025**. All questions must be submitted by **Friday, May 23, 2025**, via [proposals@careersourcerc.com](mailto:proposals@careersourcerc.com), and will be posted on the CSGC website <https://careersourcegc.com/rfps-notices>. Answers to all questions received will be posted to the webpage within two business days.

This request is for the purpose of contracting with a One Stop Operator. The One-Stop Operator’s major function, in a consultant role, will be the coordination of the service delivery among the required One-Stop Partners and their programs. Responses to this RFP are to be used to determine the best-qualified proposer and will be the basis for negotiating a contract. The contract, if awarded, will be a term of four (4) years as a one (1) year contract to be renewed annually based upon performance. Annual renewal will be the option of GCWDB and its Board of Directors.

This request for proposal does not obligate the GCWDB Board of Directors to award a contract or contracts, nor will CSRC or CSGC pay any costs incurred in the preparation of proposals. CSRC reserves the right to accept or reject any or all proposals received.

We look forward to hearing from you.

Sincerely,

CareerSource Research Coast  
Proposal Team

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



**From:** Rose, Patricia <Patricia.Rose@commerce.fl.gov>  
**Sent:** Tuesday, July 22, 2025 11:51 AM  
**To:** Elliott, Michele <Michele.Elliott@commerce.fl.gov>  
**Subject:** FW: Org Chart LWDB 4

Michele,

Please handle.

Thanks!

---

**From:** Austin, Tameka <Tameka.Austin@commerce.fl.gov>  
**Sent:** Tuesday, July 22, 2025 11:05 AM  
**To:** Rose, Patricia <Patricia.Rose@commerce.fl.gov>  
**Cc:** Nelson, Christa <Christa.Nelson@commerce.fl.gov>  
**Subject:** Org Chart LWDB 4

Good morning,

Do you have the organizational chart from LWDB 4? Can you provide our team with a copy of the chart please?

Regards,

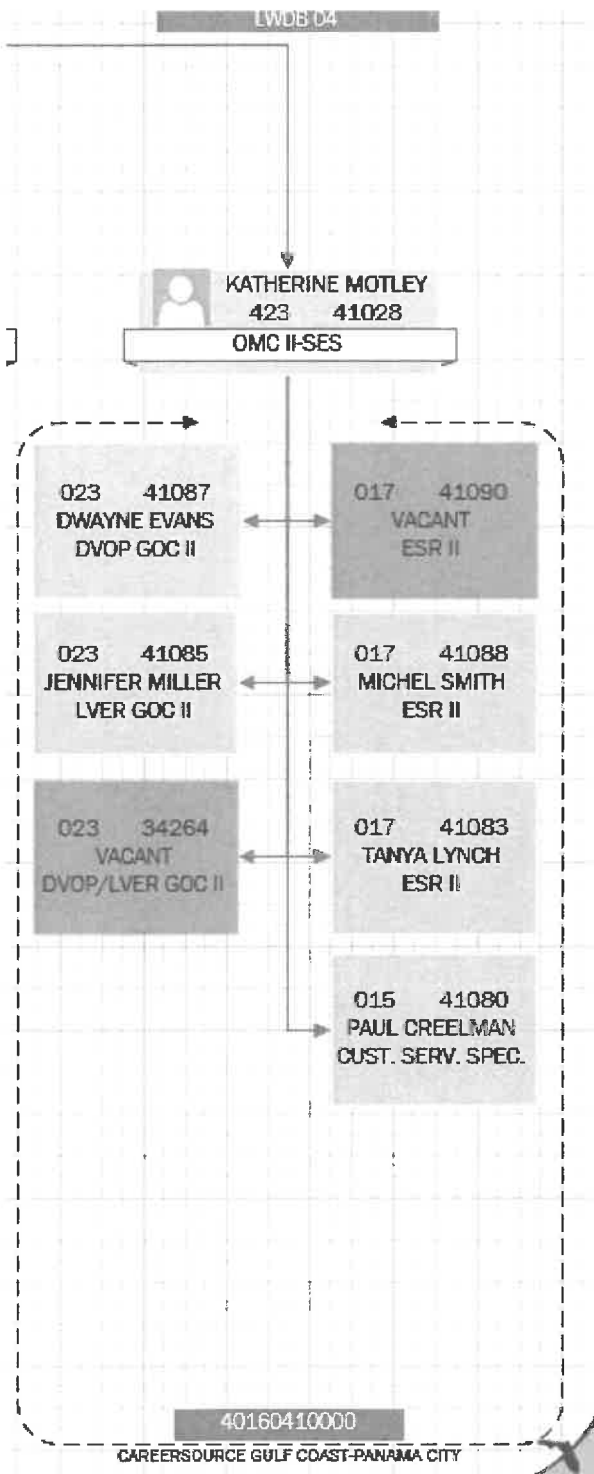
**Tameka Austin, Ph.D.**  
Statewide Governance Lead Consultant  
Division of Workforce Services

---

Florida Department of Commerce  
Office: 850.245.7424  
[www.FloridaJobs.org](http://www.FloridaJobs.org)

**FLORIDACOMMERCE**





Thank You

Michele Elliott  
Operations & Management Consultant II - SES, Division of Workforce Services  
Business Operations Support Services

FloridaCommerce  
Office: 850.245.7491

**From:** [Elliott, Michele](#)  
**To:** [Austin, Tameka](#)  
**Cc:** [Rose, Patricia](#)  
**Subject:** RE: Org Chart LWDB 4  
**Date:** Tuesday, July 22, 2025 1:02:16 PM  
**Attachments:** [image007.png](#)  
[image008.png](#)  
[image009.png](#)  
[image002.png](#)

---

Good Afternoon Tameka

Please see below, per your request.

**22. EQUAL TREATMENT FOR FAITH-BASED ORGANIZATIONS (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with 29 CFR 2, Subpart D which prohibits any State or local government receiving funds under any Department of Labor program, or any intermediate organization with the same duties as a governmental entity, from discriminating for or against an organization on the basis of the organization's religious character or affiliation. Prohibits religious organizations from engaging in inherently religious activities, such as worship, religious instruction, or proselytization, as part of the programs or services funded with direct financial assistance. Prohibits an organization that participates in programs funded by direct financial assistance from the Department of Labor, in providing services, from discriminating against a program beneficiary or prospective program beneficiary based on religion or religious belief. Any restrictions on the use of grant funds shall apply equally to religious and non-religious organizations.

**23. NEVER CONTRACT WITH THE ENEMY**

Contractor agrees to comply with regulations implementing Never Contract with the Enemy in 2 CFR part 183. The regulations in 2 CFR part 183 affect covered contracts, grants and cooperative agreements that are expected to exceed \$50,000 within the period of performance, are performed outside the United States and its territories, and are in support of a contingency operation in which members of the Armed Forces are actively engaged in hostilities.

Subrecipient Name: Gulf Coast Workforce Development Board d/b/a CareerSource Gulf Coast

Authorized Representative  
Printed Name & Title: Kimberly L. Bodine, Executive Director

Authorized Representative  
Signed Name & Title: Kimberly L. Bodine

Date: 5-18-25

**13. PROCUREMENT OF RECOVERED MATERIALS**

Subrecipient 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**

Subrecipient 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.

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

Subrecipient 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**

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

- i. Every public employer, contractor, and subcontractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees. A public employer, contractor, or subcontractor may not enter into a contract unless each party to the contract registers with and uses the E-Verify system.
- ii. A private employer shall, after making an offer of employment which has been accepted by a person, verify such person's employment eligibility. A private employer is not required to verify the employment eligibility of a continuing employee hired before January 1, 2021. However, if a person is a contract employee retained by a private employer, the private employer must verify the employee's employment eligibility upon the renewal or extension of his or her contract. As of July 1, 2023, all private employers in Florida with 25 or more employees will be required to use E-Verify, the federal government's database for verifying work authorization.

**17. FREE SPEECH AND RELIGIOUS LIBERTY (APPLICABLE TO SUB-RECIPIENTS ONLY)**

Subrecipient 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. HATCH ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with the provisions of the HATCH ACT, 5 U.S.C. 1501-1508 and 7328 which limit the political activities of employees whose principal employment activities are funded in whole or part with Federal funds.

**19. ETA SALARY LIMITATION (APPLICABLE TO SUB-RECIPIENTS ONLY)**

Sub-Recipient certifies that is in compliance with Public Law 109-234, and that none of the funds appropriated in Public Law 109-149 or prior Acts under the heading "Employment and Training" that are available for expenditures on or after May 1, 2012, shall be used by a recipient or sub-recipient of such funds to pay the salary and bonuses of an individual, either as direct costs or indirect costs, at a rate in excess of Executive Level II, except as provided for under Section 101 of Public Law 109-149. This limitation shall not apply to Sub-Recipients providing goods and services as defined in 2 CFR200.

**20. TRAFFICKING VICTIMS PROTECTION ACT (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient will comply with the Trafficking Victims Protection Act of 2000 (2 CFR 175).

**21. VETERAN'S PRIORITY OF SERVICE (APPLICABLE TO SUB-RECIPIENTS ONLY)**

The Sub-Recipient agrees to comply with the Veteran's Priority of Service Provisions (38 U.S.C. 4215 and 20 CFR 1010).



respond in writing to monitoring reports and requests for corrective action plans within 10 working days after the receipt of such request from CSGC.

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

This modified agreement may be terminated as follows:

- a. Either party may request termination of modified agreement upon 60 days prior written notice to the other party.
- b. CSGC 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. CSGC may unilaterally terminate this modified agreement at any time that it is determined that:
  - i. Subrecipient fails to provide any of the services it has contracted to provide; or
  - ii. Subrecipient fails to comply with the provisions of this modified agreement; or
  - iii. Such termination is in the best interest of CSGC.
- d. Written notification of termination must be by registered mail, return receipt requested.

If Subrecipient disagrees with the reasons for termination, they may file a grievance in writing within ten days of notice of termination to the CSGC Joint Administrative Committee, 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, Subrecipient shall be liable to CSGC for damages sustained for any breach of this modified agreement by the Subrecipient, including court costs and attorney fees, when cause is attributable to the Subrecipient.

In instances where Subrecipient violates or breaches modified agreement terms, CSGC will use all administrative, contractual, or legal remedies that are allowed by law to provide for such sanctions and penalties as may be appropriate.

## **10. PUBLIC ANNOUNCEMENTS AND ADVERTISING**

Subrecipient 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, Subrecipient 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.

## **11. PUBLIC ENTITY CRIMES**

Subrecipient shall comply with subsection 287 .L33(2)(a), F.S., whereby a person or affiliate who has been placed on the convicted Lessor 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 Lessor, supplier, sub-Lessor 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.Ot7, F.S., for Category Two for a period of thirty-six (36) months from the date of being placed on the convicted Lessor list.

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

Subrecipient 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.

**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 more than \$100,000, Subrecipient 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 Subrecipient shall report any violation of the above to the contract manager. Energy Efficiency: The Subrecipient 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).

Subrecipient 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 Subrecipient 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**

Subrecipient 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 more than \$100,000, Subrecipient must, prior to contract execution, complete the Certification Regarding Lobbying Form.

**6. CONFIDENTIALITY**

It is understood that the Subrecipient shall maintain the confidentiality of any information, regarding CSGC 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. Subrecipient shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CSGC for purposes related to the performance or evaluation of the Agreement may be divulged to

CSGC 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 CSGC. No release of information by Subrecipient, if such release is required by Federal or State law, shall be construed as a breach of this Section.

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

CSGC, 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 CSGC, 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, Subrecipient 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 Subrecipient expense, at reasonable locations as determined by CSSFL. Subrecipient shall

## **D. General Provisions And Assurances**

This attachment is part of the Subrecipient agreement held between The Gulf Coast Workforce Development Board, Inc. d/b/a CareerSource Gulf Coast (CSGC) and Subrecipient for described in the Agreement attached hereto. In consideration of the mutual covenant and stipulations set forth in the contract and Attachment herein, the parties hereby agree as follows:

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

The warranty of this Section specifically includes compliance by Subrecipient with the provisions of the Immigration Reform and Compliance Act of 1986 (P. L. 99-603), the Workforce Innovation and Opportunity Act (WIOA), the provisions of the Workforce Investment Act of 1998, 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: Subrecipient agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200. Subrecipient 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**

Subrecipient 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 to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- Section 188 of the Workforce Innovation & Opportunity Act (WIOA), which prohibits discrimination against all individuals in the United States based on 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 WIA Title I- Financially assisted program or activity.
- Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, and national origin.
- Section 504 of the Rehabilitation Act of 1973, as amended, prohibits discrimination against qualified individuals with disabilities.
- The Age Discrimination Act of 1975, as amended, prohibits discrimination based on age.
- Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs.
- Section 654 of the Omnibus Budget Reconciliation Act of 1981 prohibiting discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation, or beliefs.
- The American with Disabilities Act of 1990, P.L. 101-336 prohibiting discrimination in all employment practices, including the job application procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities; and

The Subrecipient also assures that it will comply with 29 CFR Part 37 and all other regulation implementing the laws listed above.

For contracts more than \$10,000, the Subrecipient will comply with Executive Order 11246 of September 24, 1965, entitled "Equal Employment Opportunity" as amended by Executive Order 11375 of October 13, 1967, and supplemented on Department of Labor regulations at 41 CFR Chapter 60.

## References

CareerSource Gulf Coast is happy to provide the following three references that you may contract to learn more about our reputation in the community, our experience in workforce development, and our ability to collaborate effectively with partners and local organizations.

### **Angela Reese**

Director  
Tom P. Haney Technical College  
3016 Hwy. 77  
Panama City, FL 32405  
Phone: (850) 767-5520  
Fax: (850) 747-5555  
Email: [reeseal@bay.k12.fl.us](mailto:reeseal@bay.k12.fl.us)

### **Becca Hardin**

President  
Bay Economic Development Alliance (EDA)  
5230 W. US 98  
Panama City, FL 32401  
Phone: (850) 890-2960  
Email: [Becca@bayeda.com](mailto:Becca@bayeda.com)

### **Dr. Cheryl Flax-Hyman**

Executive Vice President  
Gulf Coast State College  
5230 W. US 98  
Panama City, FL 32401  
Phone: (850) 747-3215  
Fax: (850) 913-3276  
Email: [cflax-hyman@gulfcoast.edu](mailto:cflax-hyman@gulfcoast.edu)

## A. Relationship Disclosure Form

This form must be completed by the Proposer.

In the event any information provided on this form should change, the Proposer must file an amended form on or before the date the item is considered by CareerSource Gulf Coast (CSGC).

### Part I: Information on Proposer

Legal Name of Proposer: Kimberly L. Bodine

Business Address: 5230 West US Hwy 98  
Panama City, FL 32401

Phone Number: 850-832-9962

Fax Number: 850-913-3269

### Part II:

Is Proposer a relative of any CSGC principal? ☐ Yes ☒ No

Is any CSGC principal an employee of proposer? ☐ Yes ☒ No

Is Proposer an employee of any CSGC principal? ☒ Yes ☐ No

Is Proposer a business associate of any CSGC principal? ☐ Yes ☒ No

If you responded "Yes" to any of the above questions, please state with whom and explain the relationship (use additional sheets if necessary): I am a local workforce board director, and am employed by the principals (board of directors) of the Gulf Coast Workforce Development Board d/b/a CareerSource Gulf Coast. There is no financial gain to the principals since operating as our own One Stop Operator will come from allocated funds from our budget and our board members strictly volunteers.

### Part III: Original Signature Required

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to the date of which CareerSource Gulf Coast awards a contract for the One-Stop Operator. In accordance with s.837.06 Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s.775.082 or s.775.083, Florida Statutes.

Kimberly L. Bodine

Printed Name/ Title of Person Completing Form

Kimberly L. Bodine  
Signature

May 16, 2025

Date

# Budget Information

## CareerSource Gulf Coast One Stop Operator

### 2025-2026 Program Year Budget

Description	Costs
Staff Salaries 53000	\$ 2,250
<b>TOTAL SALARIES:</b>	<b>\$ 2,250</b>
FICA & Medicare (7.65%)	\$ 172
Retirement (14.03%)	\$ 315
Health Insurance	\$ 382
Life Insurance	\$ 6
<b>TOTAL FRINGES:</b>	<b>\$ 875</b>
<b>TOTAL SALARIES &amp; FRINGES:</b>	<b>\$ 3,125</b>
Subtotal	
Indirect Costs 28%	\$ 875
<b>TOTAL</b>	<b>\$ 4,000</b>

DIVISION OF CONSUMER SERVICES  
(850) 410-3800



THE RHODES BUILDING  
2005 APALACHEE PARKWAY  
TALLAHASSEE, FLORIDA 32399-6500

FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES  
COMMISSIONER WILTON SIMPSON

---

November 19, 2024

Refer To: CH19467

GULF COAST WORKFORCE DEVELOPMENT BOARD, INC  
5230 W HIGHWAY 98  
PANAMA CITY, FL 32401-1041

RE: GULF COAST WORKFORCE DEVELOPMENT BOARD, INC  
REGISTRATION#: CH19467  
EXPIRATION DATE: December 7, 2025

Dear Sir or Madam:

The above-named organization/sponsor has complied with the registration requirements of Chapter 496, Florida Statutes, the Solicitation of Contributions Act. A COPY OF THIS LETTER SHOULD BE RETAINED FOR YOUR RECORDS.

Every charitable organization or sponsor which is required to register under s. 496.405 must conspicuously display the registration number issued by the Department and in capital letters the following statement on every printed solicitation, written confirmation, receipt, or reminder of a contribution:

"A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE."

The Solicitation of Contributions Act requires an annual renewal statement to be filed on or before the date of expiration of the previous registration. The Department will send a renewal package approximately 30 days prior to the date of expiration as shown above.

Thank you for your cooperation. If we may be of further assistance, please contact the Solicitation of Contributions section.

Sincerely,

Tamara Conyers  
Regulatory Consultant  
850-410-3705  
Fax: 850-410-3804  
E-mail: [tamara.conyers@fdacs.gov](mailto:tamara.conyers@fdacs.gov)



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**No Events**   
**No Name History**

## **Officer/Director DetailName & Address**

Title Chairman

Ginn, Joey  
3302 Country Club Drive  
Lynn Haven, FL 32444

Title Director, Executive

Bodine, Kimberly L  
5230 W Hwy 98  
Panama City, FL 32401

## **Annual Reports**

<b>Report Year</b>	<b>Filed Date</b>
2023	02/01/2023
2024	04/29/2024
2025	02/11/2025

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**No Events   No Name History**

### **Detail by Entity Name**

Florida Not For Profit Corporation

GULF COAST WORKFORCE DEVELOPMENT BOARD, INC.

#### **Filing Information**

Document Number N96000003372 FEI/EIN Number 59-3455773 Date  
Filed 06/24/1996 State FL Status ACTIVE

#### **Principal Address**

5230 WEST HIGHWAY 98  
PANAMA CITY, FL 32401-1058

Changed: 09/16/2015

#### **Mailing Address**

5230 WEST HIGHWAY 98  
PANAMA CITY, FL 32401-1058

Changed: 09/16/2015

#### **Registered Agent Name & Address** Ginn, Joey

3302 Country Club Drive  
Lynn Haven, FL 32444

Name Changed: 02/11/2025

Address Changed: 02/11/2025

#### **4. Coordination of Services Across Partners**

CSGC will coordinate efforts to improve integration across all partner programs through:

- **Common Intake Development:** Supporting the Florida WIN project implementation and exploring tools such as Crosswalk for uniform referral procedures.
- **Data Collection:** Supporting alignment of data collection items and reporting tools to ensure accurate and timely performance metrics.
- **Performance Alignment:** Promoting shared accountability through regular reporting and cross-partner training on performance expectations.
- **Stakeholder Engagement:** Gathering input from all partner agencies to inform practical and actionable improvements.

This will be an ongoing effort with partners that will include identifying technologies that may make this coordination or integration of key activities such as Common Intake and Performance Alignment more achievable.

#### **5. Comprehensive Reporting**

CSGC will deliver no fewer than two (2) and up to four (4) comprehensive reports during the contract year. These reports will include:

- Summaries of partner meetings and participant feedback
- Progress on MOU/IFA implementation
- Accessibility assessment findings and recommendations
- Technology enhancement strategies and outcomes
- Cross-partner coordination activities and performance updates

#### **D. Additional Requirements**

CSGC acknowledges the requirements for monitoring, internal controls/firewalls, confidentiality, and disclosure. CSGC will comply with 20 CFR § 679.430 and establish a written agreement with the Chief Local Elected Official (CLEO) to define roles and responsibilities and to establish sufficient firewalls and conflict of interest policies, and procedures.

#### **Conclusion**

CareerSource Gulf Coast is fully prepared to serve as the One-Stop Operator under RFP-GCWDB 25-OSO-01. We bring decades of experience, a deep understanding of WIOA and regional dynamics, and a proven track record of effective collaboration and innovation. Our approach is rooted in compliance, equity, and service excellence, with the flexibility and capacity to meet evolving workforce needs. We look forward to the opportunity to continue this important role in support of the workforce and economic vitality of Northwest Florida.

- **Agenda Development:** The agenda will be created collaboratively with CSGC and its partners and will be tailored to priority topics, including partner coordination, service alignment, and accessibility.
- **Meeting Facilitation:** Led by CSGC personnel using proven engagement techniques.
- **Meeting Activities:** Designed to be interactive, with updates on service delivery performance, and planning for continuous improvement.
- **Documentation:** Formal meeting notes will be distributed to all attendees and archived for monitoring purposes. A virtual participation option will be available for partners unable to attend in person.

Strong partnerships are the cornerstone of our success and bringing partners together regularly for feedback and brain-storming provides a deeper and current understanding of the services and processes that each partner utilizes results in more effective and efficient service delivery.

## **2. Accessibility and Effectiveness Assessment**

CSGC will work on-site with partners to assess the physical and programmatic accessibility of the One-Stop system in compliance with Section 188 of WIOA and the Americans with Disabilities Act (ADA). This includes:

- **Facility Walkthroughs:** Evaluating entrance access, signage, accommodations, and assistive technologies.
- **Programmatic Review:** Examining service delivery methods, staff training, and materials for accessibility.
- **Partner Collaboration:** Joint identification of strengths and areas for improvement.
- **Follow-Up Actions:** Recommendations for improvement.

There will be a collaborative effort between CSGC and partners to identify gaps in service and technology related to accessibility. This assessment will also include an understanding of which partners can provide assistance in filling the gaps.

## **3. Technological Improvements**

CSGC will lead the development of strategies to improve technology access and digital service delivery, focused on:

- **Digital Literacy Enhancement:** Promoting access to online learning modules, tutorials, and one-on-one support for job seekers.
- **Credential Acceleration:** Partnering with education and training providers to expand or promote virtual and hybrid credentialing pathways.
- **Professional Development:** Offering workforce staff training in digital platforms, accessibility tools, and customer service via remote delivery.
- **Inclusive Technology Access:** Ensuring all systems and platforms are compliant with accessibility standards for individuals with disabilities.

This will include a fresh look at better use of existing technologies as well as looking at new technologies such as AI. This is also a discussion that will be brought to our Education and Industry partners for input and best practices gathering.

# Proposal Narrative

## **A. Understanding/Experience in Workforce Development, the Local Network, and WIOA**

CareerSource Gulf Coast (CSGC) has extensive experience in workforce development and a deep understanding of WIOA, under which we have successfully delivered services. Our mission has consistently aligned with WIOA's goals: streamlining services, increasing accountability, improving labor market outcomes, and expanding access, especially for individuals facing barriers to employment.

We are embedded in the local workforce development network serving Bay, Gulf, and Franklin counties and maintain established partnerships with required and additional WIOA partners, including Adult Education, Career and Technical Education, Vocational Rehabilitation, TANF, SNAP E&T, and local economic development organizations. Our experience includes developing and managing Memoranda of Understanding (MOUs), Infrastructure Funding Agreements (IFAs), and supporting integrated service delivery within the One-Stop system. We have also demonstrated our commitment to WIOA's intent by continuously seeking innovative ways to enhance access, efficiency, and equity in service delivery.

## **B. Experience Facilitating Stakeholder Groups Toward Common Goals**

CSGC has consistently facilitated collaboration among a wide array of stakeholders for almost 30 years. We are a well-known and highly valued partner in our region. Our team has led and participated in regional planning efforts, MOU/IFA negotiations, and industry-specific workforce initiatives. Our facilitation methods emphasize consensus building, shared accountability, and continuous improvement.

For example, CSGC successfully worked with LWDBs 1 through 3 to be one of the first regional planning areas in the state, ensuring full compliance and timely submission of the regional plan. Over the last year, we have facilitated the regional Education and Industry Consortium that brought together employers and training providers to address talent pipeline challenges. These collaborative experiences underscore our ability to align diverse stakeholder perspectives toward common workforce goals while maintaining regulatory compliance and local flexibility.

## **C. Approach to One-Stop Operator Responsibilities**

### **1. Coordination and Facilitation of Partner Meetings**

CSGC will organize, facilitate, and document up to four in-person meetings annually, held on-site at the Comprehensive One-Stop Center. Each meeting will be structured to support the implementation and monitoring of the MOU and IFA agreements.

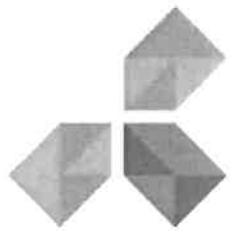


**Solicitation Number: RFP-GCWDB 25-OSO-01**

**CareerSource Gulf Coast**

5230 West US Highway 98  
Panama City, FL. 32401-1058  
P: 850.913.3285  
F: 850.913.3269





integration, coordination, and continuous improvement across the One-Stop delivery system. Our operational framework is designed to support effective communication and collaboration among all partners, enhance customer service delivery, and ensure accountability and measurable outcomes.

We are pleased to submit a total price quote of \$4,000 for the initial 12-month contract period. This amount represents our best value approach to deliver high-quality coordination and oversight services as the One-Stop Operator.

Please feel free to contact us should you need further clarification or information. We appreciate the opportunity to continue serving the Gulf Coast region and look forward to the possibility of being the One Stop Operator.

Sincerely,

**Kimberly Bodine**

Executive Director

CareerSource Gulf Coast

Email: kbodine@careersourcegfc.com



May 16, 2025

CareerSource Research Coast  
Attn: RFP Review Committee  
P.O. Box 94  
Fort Pierce, FL 34954

**RE: Response to RFP-GCWDB 25-OSO-01 – One-Stop Operator**

Dear RFP Review Committee,

CareerSource Gulf Coast respectfully submits this cover letter as part of our response to RFP-GCWDB 25-OSO-01 for One-Stop Operator for the period of July 1, 2025, through June 30, 2026, with the possibility of renewal for up to three (3) additional years, contingent upon successful performance.

We acknowledge and fully understand the scope of services as outlined in the RFP, which includes:

- Coordinating and hosting up to four in-person meetings with required and other partners to support the Memorandum of Understanding (MOU) and MOU/IFA implementation/ongoing coordination (virtual option for partners).
- Developing, in collaboration with partners, an assessment of the effectiveness, physical, and programmatic accessibility
- Developing strategies for technological improvements to facilitate access to, and improve the quality of, services and activities provided through the one-stop delivery system.
- Developing strategies to improve the coordination of services across one-stop partner programs to enhance service delivery
- Providing up to four, but not less than two, comprehensive reports indicating results from the meetings and data collection, including each of the bullets above.

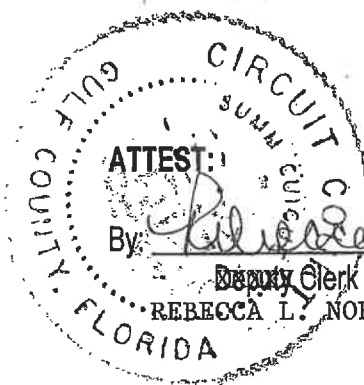
Our organization is committed to ensuring compliance with all requirements of the Workforce Innovation and Opportunity Act (WIOA) and to upholding the goals of

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Gulf Coast Workforce Development Board, Inc. d/b/a CareerSource Gulf Coast., through its Chairman authorized to execute it by Board action on the 10<sup>th</sup> day of June, 2025 and by Gulf County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 23RD day of JUNE, 2025.

**GULF COAST WORKFORCE DEVELOPMENT BOARD, INC.  
d.b.a. CAREERSOURCE GULF COAST**

By: [Signature]  
Board Chair

This 10<sup>th</sup> day of June, 2025



**GULF COUNTY BOARD OF COUNTY COMMISSIONERS**

By: [Signature]  
Chairman

This 23RD day of JUNE, 2025

**Reviewed as to form and legality**

[Signature]  
County Attorney

JUNE 23, 2025  
Date

**V. Authority and Responsibility of the Count**

**The COUNTY shall have the following responsibilities and authority:**

- A. Consult from time to time and on a continuing basis with the BOARD or as either party requests.
- B. Ensure that there is no conflict of interests, or the appearance thereof, in the activities of the COUNTY or its members or staff with respect to all activities provided for under this Agreement; and
- C. Review monitoring and performance reports provided by the CSGC Board.

**VI. Authority and Responsibilities Held Jointly Between the Board and the County.**

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

**Term**

The term of this Agreement shall begin on July 1, 2025 and shall continue through June 30, 2029 unless the BOARD neglects to fulfill its responsibilities for reasons unforeseen to either of the parties. Either party may terminate this Agreement, with or without cause, upon thirty (30) days written notice to the other party.

**Modification**

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

**Independence of Terms**

In the event any terms or provisions of this Agreement or the application to any of the parties hereto, to any extent, be held invalid or unenforceable, the remainder of this Agreement, or the application of such terms or provision to the parties hereto, other than those as to which it is held invalid or unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by the Acts, Regulations, Federal, State, or Local Law.

### **III. Confidentiality and Disclosure**

- A. 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 Gulf County Board of County Commissioners, the CareerSource Gulf Coast Board of Directors and its Executive/Finance Committee. Other than these exceptions, the One Stop Operator will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.

### **IV. Scope of Services-One Stop Operator**

#### **The one Stop Operator will:**

- A. Coordinate and host up to four in person meetings with required and other partners to support the Memorandum of Understanding (MOU) and MOU/IFA implementation/ongoing coordination (virtual option for partners). The OSO will develop meeting agendas (in conjunction with CSGC staff), meeting activities, facilitate meetings, and provide meeting notes. The OSO must be onsite at the comprehensive center for these meetings.
- B. Develop, in collaboration with partners, an assessment of the effectiveness, physical and programmatic accessibility in the One Stop Center in accordance with section 188, if applicable, and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.). The OSO must be on site for these collaborations.
- 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. Develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery (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.
- E. Provide up to four, but not less than two comprehensive reports indicating results from the meetings and data collection including each of the items listed above.

The CSGC BOARD will establish and certify to the County on an annual basis that sufficient firewalls in regard to oversight, monitoring, and evaluation of performance of the Operator, and conflict of interest policies and procedures are in place and working effectively.

Agreement between  
Gulf County Board of County Commissions for Gulf County- a political subdivision of the State of Florida  
And  
The Gulf Coast Workforce Development Board, Inc.,  
d.b.a. CareerSource Gulf Coast

This Agreement is entered into by and between the Gulf County Board of County Commissioners (the "COUNTY") and the Gulf Coast Workforce Development Board, Inc. dba CareerSource Gulf Coast (the "BOARD").

The COUNTY and the BOARD wish to enter into an agreement in compliance with the One-Stop Operator requirements imposed by WIOA.

**Purpose:**

The purpose of this Agreement is to authorize CareerSource Gulf Coast to fulfill the duties of the One-Stop Operator. The US Department of Labor requires that when a Local Workforce Development Board also functions at the One Stop Operator, sufficient conflict of interest policies must be in place to ensure transparency, accountability, and integrity. For the CSGC Board this includes the actions of oversight, monitoring and evaluation of One Stop performance.

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

**I. Oversight and Separation of Duties**

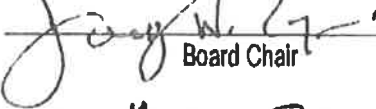
- A. The LWDB agrees to implement and maintain the following controls:
  - Operational Independence:** Staff responsible for One-Stop Operator duties shall be organizationally and functionally separate from staff supporting board governance, fiscal oversight, and monitoring functions.
- B. **Governance Firewall:** No individual involved in the day-to-day OSO operations will participate in LWDB decision-making regarding oversight or evaluation of OSO performance.
- C. **Neutral Evaluation:** The LWDB agrees to conduct internal monitoring of OSO performance using staff not involved in day-to-day OSO functions. The CEO reserves the right to engage a third party to review OSO operations or compliance with this agreement at any time. Monitoring results and corrective actions (if applicable) by both in-house monitoring and FLCOMM will be shared with both the CEO and the full CSGC Board of Directors.

**II. Conflict of Interest and Ethical Standards**


- A. The One Stop Operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.
- B. All board members and special trust staff will complete a form 1 annually filed with the Commission on Ethics.
- C. The Operator will Disclose any potential conflicts of interest arising from the relationships of the OSO with training service providers or other service providers, including but not limited to career services providers, and will comply with federal and state laws/policies regarding conflict of interests.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Gulf Coast Workforce Development Board, Inc. d/b/a CareerSource Gulf Coast., through its Chairman authorized to execute it by Board action on the 10<sup>th</sup> day of June, 2025 and by Franklin County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 18<sup>th</sup> day of June, 2025.

**GULF COAST WORKFORCE DEVELOPMENT BOARD, INC.  
d.b.a. CAREERSOURCE GULF COAST**

By:   
Board Chair  
This 10<sup>th</sup> day of June, 2025

**ATTEST:**

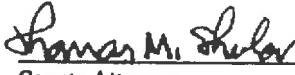
By:   
Deputy Clerk

**FRANKLIN COUNTY BOARD OF COUNTY COMMISSIONERS**

By:   
Chairman

This 18<sup>th</sup> day of June, 2025

**Reviewed as to form and legality**

  
County Attorney                      Date



**V. Authority and Responsibility of the Count**

**The COUNTY shall have the following responsibilities and authority:**

- A. Consult from time to time and on a continuing basis with the BOARD or as either party requests.
- B. Ensure that there is no conflict of interests, or the appearance thereof, in the activities of the COUNTY or its members or staff with respect to all activities provided for under this Agreement; and
- C. Review monitoring and performance reports provided by the CSGC Board.

**VI. Authority and Responsibilities Held Jointly Between the Board and the County.**

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

**Term**

The term of this Agreement shall begin on July 1, 2025 and shall continue through June 30, 2029 unless the BOARD neglects to fulfill its responsibilities for reasons unforeseen to either of the parties. Either party may terminate this Agreement, with or without cause, upon thirty (30) days written notice to the other party.

**Modification**

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

**Independence of Terms**

In the event any terms or provisions of this Agreement or the application to any of the parties hereto, to any extent, be held invalid or unenforceable, the remainder of this Agreement, or the application of such terms or provision to the parties hereto, other than those as to which it is held invalid or unenforceable, shall not be affected thereby and every other term and provision of this Agreement shall be valid and enforced to the fullest extent permitted by the Acts, Regulations, Federal, State, or Local Law.

### **III. Confidentiality and Disclosure**

- A. 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 Franklin County Board of County Commissioners, the CareerSource Gulf Coast Board of Directors and its Executive/Finance Committee. Other than these exceptions, the One Stop Operator will not publish, reproduce, or otherwise divulge such information, completely or in part, nor authorize or permit others to do so.

### **IV. Scope of Services-One Stop Operator**

#### **The one Stop Operator will:**

- A. Coordinate and host up to four in person meetings with required and other partners to support the Memorandum of Understanding (MOU) and MOU/IFA implementation/ongoing coordination (virtual option for partners). The OSO will develop meeting agendas (in conjunction with CSGC staff), meeting activities, facilitate meetings, and provide meeting notes. The OSO must be onsite at the comprehensive center for these meetings.
- B. Develop, in collaboration with partners, an assessment of the effectiveness, physical and programmatic accessibility in the One Stop Center in accordance with section 188, if applicable, and the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.). The OSO must be on site for these collaborations.
- 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. Develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery (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.
- E. Provide up to four, but not less than two comprehensive reports indicating results from the meetings and data collection including each of the items listed above.

The CSGC BOARD will establish and certify to the County on an annual basis that sufficient firewalls in regard to oversight, monitoring, and evaluation of performance of the Operator, and conflict of interest policies and procedures are in place and working effectively.

Agreement between  
Franklin County Board of County Commissions for Franklin County- a political subdivision of the State of Florida  
And  
The Gulf Coast Workforce Development Board, Inc.,  
d.b.a. CareerSource Gulf Coast

This Agreement is entered into by and between the Franklin County Board of County Commissioners (the "COUNTY") and the Gulf Coast Workforce Development Board, Inc. dba CareerSource Gulf Coast (the "BOARD").

The COUNTY and the BOARD wish to enter into an agreement in compliance with the One-Stop Operator requirements imposed by WIOA.

**Purpose:**

The purpose of this Agreement is to authorize CareerSource Gulf Coast to fulfill the duties of the One-Stop Operator. The US Department of Labor requires that when a Local Workforce Development Board also functions at the One Stop Operator, sufficient conflict of interest policies must be in place to ensure transparency, accountability, and integrity. For the CSGC Board this includes the actions of oversight, monitoring and evaluation of One Stop performance.

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

**I. Oversight and Separation of Duties**

A. The LWDB agrees to implement and maintain the following controls:

**Operational Independence:** Staff responsible for One-Stop Operator duties shall be organizationally and functionally separate from staff supporting board governance, fiscal oversight, and monitoring functions.

B. **Governance Firewall:** No individual involved in the day-to-day OSO operations will participate in LWDB decision-making regarding oversight or evaluation of OSO performance.

C. **Neutral Evaluation:** The LWDB agrees to conduct internal monitoring of OSO performance using staff not involved in day-to-day OSO functions. The CEO reserves the right to engage a third party to review OSO operations or compliance with this agreement at any time. Monitoring results and corrective actions (if applicable) by both in-house monitoring and FLCOMM will be shared with both the CEO and the full CSGC Board of Directors.

**II. Conflict of Interest and Ethical Standards**

A. The One Stop Operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.

B. All board members and special trust staff will complete a form 1 annually filed with the Commission on Ethics.

C. The Operator will Disclose any potential conflicts of interest arising from the relationships of the OSO with training service providers or other service providers, including but not limited to career services providers, and will comply with federal and state laws/policies regarding conflict of interests.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Gulf Coast Workforce Development Board, Inc. d/b/a CareerSource Gulf Coast., through its Chairman authorized to execute it by Board action on the 10<sup>th</sup> day of JUNE, 2025 and by Bay County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 17 day of June, 2025.

GULF COAST WORKFORCE DEVELOPMENT BOARD, INC.  
d.b.a. CAREERSOURCE GULF COAST

By: [Signature]  
Board Chair

This 10<sup>th</sup> day of June, 2025

BAY COUNTY BOARD OF COUNTY COMMISSIONERS

By: [Signature]  
Chairman

This 17<sup>th</sup> day of June, 2025

**V. Authority and Responsibility of the Count**

**The COUNTY shall have the following responsibilities and authority:**

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- A. It is the joint responsibility of both parties to ensure the effective delivery of services to provide the most benefit to residents and employers of Bay County. It is further the shared responsibility of both parties to stimulate the active and effective participation of all sectors of the community in the provision of workforce development services.
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The CSGC BOARD will establish and certify to the County on an annual basis that sufficient firewalls in regard to oversight, monitoring, and evaluation of performance of the Operator, and conflict of interest policies and procedures are in place and working effectively.

Agreement between  
Bay County Board of County Commissions for Bay County- a political subdivision of the State of Florida  
And  
The Gulf Coast Workforce Development Board, Inc.,  
d.b.a. CareerSource Gulf Coast

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

**I. Oversight and Separation of Duties**

- A. The LWDB agrees to implement and maintain the following controls:  
**Operational Independence:** Staff responsible for One-Stop Operator duties shall be organizationally and functionally separate from staff supporting board governance, fiscal oversight, and monitoring functions.
- B. **Governance Firewall:** No individual involved in the day-to-day OSO operations will participate in LWDB decision-making regarding oversight or evaluation of OSO performance.
- C. **Neutral Evaluation:** The LWDB agrees to conduct internal monitoring of OSO performance using staff not involved in day-to-day OSO functions. The CEO reserves the right to engage a third party to review OSO operations or compliance with this agreement at any time. Monitoring results and corrective actions (if applicable) by both in-house monitoring and FLCOMM will be shared with both the CEO and the full CSGC Board of Directors.

**II. Conflict of Interest and Ethical Standards**

- A. The One Stop Operator shall comply with applicable requirements of the "Sunshine Law" regarding official activities of the local board.
- B. All board members and special trust staff will complete a form 1 annually filed with the Commission on Ethics.
- C. The Operator will Disclose any potential conflicts of interest arising from the relationships of the OSO with training service providers or other service providers, including but not limited to career services providers, and will comply with federal and state laws/policies regarding conflict of interests.



careersourcerc.com

June 6, 2025

Dear Proposer:

The Workforce Development Board of Treasure Coast, Inc. d/b/a CareerSource Research Coast (CSRC) has reviewed your proposal for a One-Stop Operator (OSO) in accordance with the Workforce Innovation and Opportunity Act (WIOA) sec. 121 (d) (2) (a), and CareerSource Florida - Administrative Policy #097 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.

Your proposal passed technical review and was the only proposal received. Based on this review, CSRC completed the rating as was a requirement of the Request For Proposal (RFP) and is making the recommendation to the Gulf Coast Workforce Development Board d/b/a CareerSource Gulf Coast (CSGC) Board of Directors to have CSGC serve as the OSO for the Local Workforce Development Area and LWDB. Enclosed are the copies of the CSRC Composite Rating Sheet for RFP GCWDB-25-OSO-01 and the CSRC Rating Team Compilation for RFP GCWDB-25-OSO-01.

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

Respectfully,

A handwritten signature in black ink, appearing to read "B. K. Bauer", is written over a faint, larger signature.

Brian K. Bauer  
President/CEO

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



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

## Consent Item 9

### **CAREERSOURCE ESCAROSA REQUEST FOR A WAIVER OF LOCAL WORKFORCE DEVELOPMENT BOARD COMPOSITION AND CERTIFICATION REQUIREMENTS AND CONDITIONAL APPROVAL OF LOCAL BOARD COMPOSITION AND CERTIFICATION**

Once every two years, one local workforce development board (LWDB) must be certified for each local area in the state, based on the local board membership requirements described in Workforce Innovation and Opportunity Act (WIOA) sec. 107(b) and [20 CFR 679.320](#). [Section 445.004\(11\), Florida Statutes](#) (F.S.), requires the state board, in consultation with the Florida Department of Commerce (FloridaCommerce), to ensure that LWDBs have membership consistent with the requirements of federal and state law. For a second or subsequent certification, the certification must also be based on the extent to which the local area ensures workforce investment activities carried out in the local area enabled the local area to meet the corresponding performance accountability measures and achieve fiscal integrity as defined in WIOA sec. 106(e)(2).

[CareerSource Florida Workforce Policy 091 – Local Workforce Development Board Composition and Certification](#), provides LWDBs with the requirements for LWDB membership composition under WIOA and Chapter 445, F.S., and the process for certification of LWDBs.

In June 2024, the CareerSource Florida Board of Directors conditionally approved nine local boards, including CareerSource Escarosa, contingent upon approval signatures and/or appointment of private education providers to the LWDB. CareerSource Escarosa (LWDB 01) submitted documentation to FloridaCommerce related to the conditional approval of their local board composition and certification to resolve outstanding issues, including a “request for a waiver of the requirement to include two representatives of labor organizations” on the LWDB.

CareerSource Escarosa has not yet complied with the requirement in [20 CFR 679.320\(c\)\(1\)](#) and CareerSource Florida Workforce [Policy 091 – Local Workforce Development Board Composition and Certification](#) regarding representation of labor organizations as part of the board membership. CareerSource Escarosa provided

supporting documentation of their efforts to locate such a representative over an extended period (May 2021 – October 2025). Although labor organizations exist within the Local Workforce Development Area, CareerSource Escarosa has been unable to secure representation to comply with board composition requirements. As outlined in attached documentation, CareerSource Escarosa utilized multiple options to attract and acquire labor representation.

As referenced in supporting documents, CareerSource Escarosa achieved or exceeded 11 of 18 adjusted performance targets for Program Year (PY) 2023-2024. Of the seven adjusted performance targets not achieved, four were not achieved for the program years PY2022-2023. CareerSource Escarosa achieved or exceeded 14 of 18 negotiated performance targets for PY 2024-2025. Of the four negotiated targets missed, two targets (Dislocated Worker and Youth Credential Attainment Rates) were not achieved in PY 2023-2024. CareerSource Florida assigns letter grades to LWDBs annually by October 15, following the close of each program year. CareerSource Escarosa currently holds a B score for its PY 2024-2025 performance.

FloridaCommerce and CareerSource Florida reviewed CareerSource Escarosa's request for "a waiver of LWDB composition to include two representatives of labor organizations" on their LWDB. The waiver process set forth in section 445.007(1), Florida Statutes and Policy P91, Local Workforce Development Board Composition and Certification, is limited to circumstances in which a private education provider is required to be appointed to a local board, but such private education provider does not exist in the region. That process does not apply to this circumstance.

Based on the review of documentation provided and the performance of the LWDB, FloridaCommerce and CareerSource Florida recommend denial of the requested waiver, for the reasons explained above; conditional approval of CareerSource Escarosa's board composition and certification, contingent upon the following:

- CareerSource Escarosa complying with the board composition requirements on or before June 30, 2026, reflecting that at least 20% of LWDB members must be workforce representatives that include at least two labor organization representatives as part of its board membership.
- Attendance of CareerSource Escarosa at monthly meetings with FloridaCommerce and CareerSource Florida to ensure compliance regarding progress towards requirements for LWDB membership composition.

CareerSource Escarosa's progress in these areas will be monitored and shared with the CareerSource Florida Board of Directors.

## **FOR CONSIDERATION**

- **Deny CareerSource Escarosa's request for a waiver of the requirement to include two representatives of labor organizations on the Local Workforce Development Board.**
- **Extend conditional approval of CareerSource Escarosa's board composition and certification through June 30, 2026, contingent upon CareerSource Escarosa working with FloridaCommerce and CareerSource Florida to ensure compliance with board composition and certification requirements and monthly check-ins regarding progress towards fulfilling requirements for LWDB members composition.**

### **Attachments:**

- CareerSource Escarosa Waiver Request
- Board Roster and Composition
- FloridaCommerce Checklist
- Performance information

October 6, 2025

TO: CareerSource Florida Board of Directors

Pursuant to Section 445.007(1), Florida Statutes and FloridaCommerce Administrative Policy No. 91, *Local Workforce Development Board Composition and Certification*, CareerSource Escarosa (LWDB 01) respectfully requests a waiver of the requirement to include two (2) representatives of labor organizations (and/or a representative from a joint labor-management registered apprenticeship program) on our Local Workforce Development Board.

This request is based on the fact that such representatives do not exist within the Local Workforce Development Area as documented below.

Over the period May 6, 2021 to October 2025, LWDB 01 undertook the following actions to identify and recruit eligible labor representatives:

- Contacted (List Labor Unions and show dates and outcomes).
- Contacted (List apprenticeship programs, dates and outcomes).
- Meeting notes summarizing discussions with regional stakeholders
- Posted Public Notice(s) found on [www.careersourceescarosa.com](http://www.careersourceescarosa.com) Found Under **Agenda Item—BOARD GOVERNANCE: BOARD ATTENDANCE AND VACANCIES on the following dates:** March 17, 2022 | June 1, 2022 | May 18, 2023 | July 20, 2023 | November 3, 2023 | April 18, 2024 | July 18, 2024 | October 17, 2024 | January 30, 2025 | April 17, 2025 | May 22, 2025 Located online: <https://careersourceescarosa.com/leadership/board-minutes/>
- The following excerpts were from the recorded minutes for meeting(s) of the CareerSource Escarosa Board of Directors:
  - **May 6, 2021**—announcement made, documented in CareerSource Escarosa Board Meeting.
    - *Scott Luth who is President/CEO at FloridaWest Economic Development Alliance was welcomed to the Board. He represents Business on the CareerSource Escarosa Board of Directors. **It was noted there are two Labor Union vacancies on the board. There also will be one Santa Rosa County Business vacancy on the Board, as Dana Mullins who represents Santa Rosa County Business will complete her term on May 9, 2021. Ms. Mullins also serves in an officer capacity on the Board – Secretary/Treasurer. This officer position will need to be filled as well. Recommendations for filling 3 these vacancies were welcomed from the Board. Dr. McBride informed that he has reached out to several labor organizations regarding board membership.***
  - **September 16, 2021**—CareerSource Escarosa Board of Directors voted to remove previous Labor Union Representative due to lack of participation/no involvement since 2019-20 program year. Prior to Dr. McBride’s employment as CEO at

CareerSource Escarosa. See attached CSE Board Meeting Minutes from September 16, 2021.

- **January 20, 2022**—CareerSource Escarosa Board Meeting. Update provided on board governance and board membership. Reviewed 6 appointments.
  - *An update on Board membership was made available to the Board. Several candidates are being considered for the following appointments: • 4 candidates for Business • 1 candidate for Workforce – Joint Labor Management Apprentice Program, a required seat. • 1 candidate for Workforce – Community-based Organizations representing Youth. (See attached CSE Board Meeting Minutes)*
- **June 16, 2022**—Board Governance: Board Attendance and Vacancies were presented to the CSE Board of Directors. Information forwarded to CLEOS for Board Recruitment Packets requesting recommendations.
- **August 18, 2022**—Board Governance: Board Attendance CSE Board of Directors
  - *Information on Board Governance, attendance and vacancies, was made available to the Board. CSE continues to focus on vacant seats (6 Santa Rosa Business and 2 Labor Organizations) on the Board of Directors. Request was made regarding assistance with filling these seats. Several reps were mentioned to fill the seats. Request was made regarding dissemination of information to the board regarding criteria to serve as a member.*
- **September 15, 2022**—Board Governance: Board Attendance reviewed with CSE Board of Directors
  - *Ex-Officio, Lani Burritt, welcomed to CSE BOD representing Santa Rosa County Board of County Commissioners.*
- **August 23, 2022** - announcement made and solicitation for CSE Board of Directors  
BOARD GOVERNANCE: ATTENDANCE AND VACANCIES
- **March 16, 2023**, Discussion Re: CSE BOARD VACANCIES AND OFFICERS ON BOARD
  - *CSE currently has four (4) business seats vacant (1 Escambia/3 Santa Rosa), and two (2) labor seats vacant. CSE's Board of Directors Officer seats will be affected with the end of Kathaleen Cole's tenure as Chair, ending June 30, 2023, and possible departure of Scott Luth, Vice Chair, from the board in May 2023. Ms. Cole will move to the seat of Past Chair following her departure of Chair. CSE's By-Laws states that the Chair shall be chosen by the Board of Directors and all other officers be recommended by a Nominating Committee and approved by the Board of Directors. The Chair requested a Nominating Committee be established to address/nominate the upcoming vacant officer seats on the board. The following members will serve on the Nominating Committee: Jerry Kersey, Michael Listau, Tawana Gilbert, and Jeffrey Hondorp.*

- **January 25, 2024**—INFORMATION ITEMS BOARD GOVERNANCE: ATTENDANCE AND VACANCIES
  - *Information regarding board membership (attendance, vacancies, criteria for and responsibilities of membership) was made available to the board. Dr. McBride thanked the board for their service. He informed of the Interlocal Agreement between CSE and the Boards of County Commissioners – Santa Rosa and Escambia Counties. He **noted the vacant seats for labor union organization representation and no success in his recruitment efforts. A request for assistance in recruiting for this representation was made by Dr. McBride.***
- **January 30, 2025**—BOARD GOVERNANCE: ATTENDANCE AND VACANCIES
  - *A report of both attendance and vacancies was made available to the board. Dr. McBride expressed thanks for the efforts made to fill board vacancies. **He noted that CSE is in need of board members, with emphasis on union labor representative. Information has been presented to the Chief Local Elected Official (CLEOs), union labor organizations, and nominating agencies regarding the need for board membership. He expressed the difficulty in recruiting union labor representatives on the board. Steven Harrell offered his assistance regarding recruitment for labor union representation.***
- Consulted with (regional economic development councils, chambers, etc., as applicable).
  - **August 6, 2021 | November 19, 2021** | email correspondence with Donna Tucker, President & CEO of Santa Rosa County Chamber of Commerce
  - **October 20, 2023 | November 21, 2023** | email correspondence with CLEO regarding board appointments needed for board governance
  - **April 21, 2025** email correspondence with Jennifer Conoley, President & CEO for the regional economic development agency serving 13 counties in NWFL.
  -

All outreach efforts confirmed that there are no active labor organizations or joint labor-management registered apprenticeship programs with members or operations willing to serve within the geographic boundaries of the two-county region of CareerSource Escarosa.

As supporting documentation, please find attached: (as available)

- Copies of outreach letters and emails from CareerSource Escarosa CEO as well as responses received from labor organizations/apprenticeship programs and minutes from board meetings:
  - August 23, 2022 - announcement made and solicitation in the PNJ for Labor Union Representation
  - November 28, 2022 - request made for labor union representatives from local teachers' union

- November 29, 2023 - meeting with the BOCC CLEO (county administrator) requesting assistance for nominations
- March 4, 2024 - request for assistance from the CEO at the local EDO (nominating organization). Note: This position was vacant after the first CEO resigned and has changed twice now which has not been favorable for getting assistance there from the EDO.
- February 13, 2024 | March 1, 2024 | April 21, 2025| - email chain requesting representation from IBEW
- July 31, 2024 | November 6, 2024 | November 12, 2024 | January 10, 2025| email chain and follow up from requests made to the Santa Rosa County EDO and BOCC for assistance for labor union representatives

CareerSource Escarosa acknowledges that if available labor or apprenticeship representatives becomes available within the geographic confines of LWDB 01 during the current board certification period, LWDB 01 will take immediate steps to recruit and appoint such representative(s) in compliance with current regulations.

CareerSource Escarosa respectfully requests that the CareerSource Florida Board approve this temporary waiver for the current certification period.

Thank you for your consideration. If you have questions, please contact Marcus L. McBride, PhD for additional information.

Marcus L. McBride, PhD  
Chief Executive Officer

## Program Year (PY) 2023-2024

[illegible]




\*\*\* Please note that this column is solely used to calculate compliance with the 50% business and 20% workforce membership requirement. For members that serve multiple roles, please select *business* or *workforce* sector in the first column and the secondary role in the second column.

	Member Count	Member Percentage	
<b>Board Members in Business Sector</b>	9	64%	Total must 50% or greater
<i>Member of Small Business</i>	4	Meets Minimum	<i>Minimum of 2 business representatives</i>
<i>Other Business Sectors</i>	1		<i>Remaining business representatives</i>
<i>Vacant Business Sector seats</i>	4		<i>Vacant Seats</i>
<b>Board Members in Workforce Sector</b>	2	14%	Total must be 20% or greater
<i>Labor organization in the local area</i>	0		<i>If in existence, must include 2 or more Workforce representatives</i>
<i>Joint labor-management organization</i>	0		
<i>Union affiliated registered apprenticeship program</i>	0	Meets Minimum	<i>If in existence, must include 1 or more Workforce representatives from these three categories</i>
<i>Non-union affiliated registered apprenticeship program</i>	1		
<i>Community-based organization with experience and expertise in addressing the employment, training or education needs of individuals with barriers to employment</i>	0		<i>May include 1 or more Workforce representatives</i>
<i>Organization that serves veterans</i>	0		<i>May include 1 or more Workforce representatives</i>
<i>Organization which provides or supports competitive integrated employment for individuals with disabilities</i>	0		<i>May include 1 or more Workforce representatives</i>
<i>Organization with experience and expertise in addressing the employment, training, or education needs of eligible youth</i>	1		<i>May include 1 or more Workforce representatives</i>
<i>Vacant Workforce Sector Seats</i>	0		<i>Vacant Seats</i>
<b>Board Members in Other Sectors</b>	4	29%	Remaining Percentage
<i>Training provider administering adult education and literacy activities under WIOA title II</i>	2	Meets minimum	<i>Must include 1 representative</i>
<i>Institution of higher education providing workforce investment activities</i>	1	Meets minimum	<i>Must include 1 representative</i>
<i>Economic and community development entity</i>	1	Meets minimum	<i>Must include 1 representative</i>
<i>State Employment Service Office under Wagner Peyser Act (29 U.S.C. 49) serving the local area</i>	0		<i>Must include 1 representative - FloridaCommerce realizes that this position may not be filled.</i>
<i>Program carried out under title I of the Rehabilitation Act o 1973, other than sec.112 or part C of that title</i>	0	Does not meet minimum	<i>Must include 1 representative</i>

<i>Other Entity that administers education and training activities, represents local educational agencies or community-based organizations that have expertise in addressing the education or training needs for individuals with barriers to employment</i>	0		<i>May include representatives</i>
<i>Governmental and economic and community development entities who represent transportation, housing, and public assistance programs</i>	0		<i>May include representatives</i>
<i>Philanthropic organizations serving the local area</i>	0		<i>May include representatives</i>
<i>Other appropriate individuals as determined by the chief elected official</i>	0		<i>May include representatives</i>
<i>Vacant Other Seats</i>	0		<i>Vacant Seats</i>
<b>Member Count</b>	14		
<b>Representation Count</b>	15		

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## Announcement for Labor Union Vacancy on the Board

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**From** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

**Date** Tue 8/23/2022 10:24 AM

**To** Sims, Janay <JSims@Careersourceescarosa.com>

Hello, Janay,

Please put together an announcement targeting the business sector and labor unions for the CSE board of directors. I would like to review the announcement and run several different announcements on LinkedIn and the PNJ.

Thank you,

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

6913 North 9<sup>th</sup> Avenue  
Pensacola, Florida 32504  
C: 850.516.7316  
P: 850.741.4409

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## Board of Directors Information

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**From** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

**Date** Mon 11/28/2022 10:27 AM

**To** Sims, Janay <JSims@Careersourceescarosa.com>

**Cc** Darzell Warren <dwarren@ecsd.me>

Hello, Janay,

Please forward Ms. Warren the board meeting schedule and the packet for board membership. She is aware of the labor union representation needed on the board at CSE and is reviewing her commitments to see if she may be able to serve on the board representing the Teacher's Union.

Ms. Warren,

Please let Janay know if you should need something else.

Respectfully,

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

6913 North 9<sup>th</sup> Avenue  
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**Re: Board of Directors Information**

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**From** Warren, Darzell <dwarren@ecsdfl.us>

**Date** Tue 11/29/2022 9:49 AM

**To** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

**Cc** Sims, Janay <JSims@Careersourceescarosa.com>; Darzell Warren <dwarren@ecsd.me>

You don't often get email from dwarren@ecsdfl.us. [Learn why this is important](#)

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

Morning,

Just a request to send all correspondence to my other email address: [darzell.warren@floridaea.org](mailto:darzell.warren@floridaea.org). I check that address first and more frequently during the day.

Darzell Warren  
President  
Escambia Education Association  
(850) 476-2906 (office)  
(850) 266-4547 (cell)

On Mon, Nov 28, 2022 at 10:27 AM McBride, Marcus <[Mmcbride@careersourceescarosa.com](mailto:Mmcbride@careersourceescarosa.com)> wrote:

Hello, Janay,

Please forward Ms. Warren the board meeting schedule and the packet for board membership. She is aware of the labor union representation needed on the board at CSE and is reviewing her commitments to see if she may be able to serve on the board representing the Teacher's Union.

Ms. Warren,

Please let Janay know if you should need something else.

Respectfully,

**Marcus L. McBride, PhD**

**Chief Executive Officer  
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RE: Meeting with Wes Moreno | Information on Labor Unions

From Sims, Janay <JSims@Careersourceescarosa.com>  
Date Wed 11/29/2023 8:34 AM  
To McBride, Marcus <Mmcbride@Careersourceescarosa.com>

 1 attachment (19 KB)  
Labor Unions.docx;

Dr. McBride,

See attached list of union labors. We have had representatives from the highlighted organizations represented on our board in the past.

Thank you,

**From:** McBride, Marcus <Mmcbride@Careersourceescarosa.com>  
**Sent:** Tuesday, November 28, 2023 1:52 PM  
**To:** Sims, Janay <JSims@Careersourceescarosa.com>  
**Subject:** Meeting with Wes Moreno | Information on Labor Unions

Hello, Janay,

Please confirm the appointment time for my meeting with Wes Moreno. I would also like to have the list of labor union organizations to present to Wes Moreno when I meet with him.

Respectfully,

**Marcus L. McBride, PhD**  
Chief Executive Officer  
CareerSource ESCAROSA  
6913 North 9th Avenue  
Pensacola, Florida 32504  
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Re: Meeting with Wes Moreno | Information on Labor Unions

From McBride, Marcus <Mmcbride@Careersourceescarosa.com>  
Date Wed 11/29/2023 9:48 AM  
To Sims, Janay <JSims@Careersourceescarosa.com>

Thank you for the list. Please print this out for the packets for my meeting with BOCC Administrator. I would like to review the packets before this afternoon.

Respectfully,

**Marcus L. McBride, PhD**  
Chief Executive Officer  
CareerSource ESCAROSA  
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**Sent:** Wednesday, November 29, 2023 8:34 AM  
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**Marcus L. McBride, PhD**  
Chief Executive Officer  
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Date Wed 11/29/2023 9:48 AM  
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**Marcus L. McBride, PhD**  
Chief Executive Officer  
CareerSource ESCAROSA  
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Respectfully,

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

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**Board Member Profile Sheet**

---

**From** McBride, Marcus <Mmcbride@Careersourceescarosa.com>  
**Date** Mon 3/4/2024 9:18 AM  
**To** Brian Hilson <bhilson@floridawesteda.com>

Hello, Brian,

I hope all is well with you. Please let me know if you have any questions related to the board member profile sheet that was emailed to you by Janay.

Have you thought of any possible recommendations for the labor union representatives needed for the Board of Directors?

Respectfully,

**Marcus L. McBride, PhD**  
Chief Executive Officer  
CareerSource ESCAROSA  
6913 North 9th Avenue  
Pensacola, Florida 32504  
C: 850.516.7316  
P: 850.741.4409

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---

**RE: Follow-Up on Board Member Recruitment & Partner of the Year**

---

**From** Bridgette Price <Bridgette@santarosa.fl.gov>  
**Date** Fri 1/10/2025 8:39 AM  
**To** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

 1 attachment (4 MB)

CSE Board Appointment for Santa Rosa County\_BOCC Mtg August 8 2024.pdf;

Happy New Year Dr. McBride,

I hope all is well. I sent Tarae the BOCC meeting details of the CareerSource Escarosa Board appointees. I am not sure if there was a disconnect in relaying this information back to your organization but if we need to reevaluate based on lack of response or involvement, then let me know so I can chat with Shannon and Brad. Otherwise, I was checking that the appropriate follow-up was completed. Let me know how to continue to assist. I have your notes below and can send over to the new BOCC for more information if needed.

I agree that we need to resolve this for SRC. Thanks for dropping off the Partner of the Year award 😊. Here's to a great 2025 and continued success!

## Bridgette Price

**Economic Development Project Manager**  
**Santa Rosa Economic Development Office**  
**6491 Caroline Street, Suite 4 | Milton, Florida 32570**  
**P: 850.623.0174 | 850.981.2069**

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**From:** McBride, Marcus <Mmcbride@Careersourceescarosa.com>  
**Sent:** Tuesday, November 12, 2024 8:35 AM  
**To:** Bridgette Price <Bridgette@santarosa.fl.gov>  
**Subject:** Re: Follow-Up on Board Member Recruitment & Partner of the Year

Hello, Bridgette,

I hope you enjoyed your time out of the office with some R&R! Looking forward to the board appointees. We really need someone strong in finance to possibly chair the finance committee and someone in marketing would be a great addition too.

We desperately need union representation. That is a major concern for the board governance structure.

Respectfully,

## Marcus L. McBride, PhD

Chief Executive Officer  
CareerSource ESCAROSA  
6913 North 9th Avenue  
Pensacola, Florida 32504  
C: 850.516.7316  
P: 850.741.4409

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**From:** Bridgette Price <[Bridgette@santarosa.fl.gov](mailto:Bridgette@santarosa.fl.gov)>  
**Sent:** Tuesday, November 12, 2024 8:17 AM  
**To:** Donaldson, Tarae <[TDonaldson@Careersourceescarosa.com](mailto:TDonaldson@Careersourceescarosa.com)>  
**Cc:** McBride, Marcus <[Mmcbride@Careersourceescarosa.com](mailto:Mmcbride@Careersourceescarosa.com)>; Chad Brillante <[cbrillante@careersourceescarosa.com](mailto:cbrillante@careersourceescarosa.com)>  
**Subject:** RE: Follow-Up on Board Member Recruitment & Partner of the Year

Good Morning Tarae!

Thanks for your note this morning. I took a few days off for the extended holiday. It is very exciting to be partner of the year and appreciate the recognition. I will work on some photos from the Career Fair and a few talking points for you. In terms of the board appointees, we have selected a few new members at a BOCC meeting in October. Let me look into this. I am also going to recommend that our Santa Rosa Chamber sends out an email for nominations. I will certainly be in touch with you soon. Thanks again, Bridgette

### Bridgette Price

**Economic Development Project Manager**  
**Santa Rosa Economic Development Office**  
**6491 Caroline Street, Suite 4 | Milton, Florida 32570**  
**P: 850.623.0174 | 850.981.2069**

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**From:** Donaldson, Tarae <[TDonaldson@Careersourceescarosa.com](mailto:TDonaldson@Careersourceescarosa.com)>  
**Sent:** Wednesday, November 6, 2024 11:40 AM  
**To:** Bridgette Price <[Bridgette@santarosa.fl.gov](mailto:Bridgette@santarosa.fl.gov)>  
**Cc:** McBride, Marcus <[Mmcbride@Careersourceescarosa.com](mailto:Mmcbride@Careersourceescarosa.com)>; Chad Brillante <[cbrillante@careersourceescarosa.com](mailto:cbrillante@careersourceescarosa.com)>  
**Subject:** Follow-Up on Board Member Recruitment & Partner of the Year

Good Morning, Bridgette:

I hope this email finds you well. I wanted to follow up with you on 2 items. The first being our last conversation about recruiting new board members for CareerSource Escarosa. Has there been any progress in this area so far or any strong candidates you're considering? As we continue this process of recruiting/filling our Board vacancies, your ongoing support and involvement remain invaluable to us.

Secondly, we are pleased to inform you that Dr. McBride and our leadership would like to feature Santa Rosa EDO as our **Partner of the Year** in our upcoming Annual Report! This is a reflection of the incredible partnership we've built and the impactful work we're doing together.

To help us highlight your contributions, could you please send us a couple of photos of you, Shannon, and your team? Additionally, we would appreciate it if you could provide just a few bullet points summarizing some of your key collaborative efforts with us over the past year. These will be included in our final write-up to showcase your organization's dedication and the success of our partnership.

Thank you again for your continued support. We look forward to sharing this recognition in our report and are excited about the future of our collaboration!

Sincerely,

**Tarae Donaldson, MPA, CWDP**  
**Director of Career Services & One Stop Operations**

CareerSource Escarosa  
6913 N. 9th Avenue  
Pensacola, FL 32504  
P: 850.607.8787  
F: 850.607.8851

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**From:** Donaldson, Tarae <[TDonaldson@Careersourceescarosa.com](mailto:TDonaldson@Careersourceescarosa.com)>

**Sent:** Wednesday, July 31, 2024 2:23 PM

**To:** Bridgette Price <[Bridgette@santarosa.fl.gov](mailto:Bridgette@santarosa.fl.gov)>

**Subject:** Re: CSE Board Member Recruitment Materials

Good Afternoon:

I hope your day is going well. I absolutely love the video! ❤️ The SREDO is on top of things!

I spoke with Dr. McBride in between his meetings today to ensure I had the most up to date documents and information. Please find attached the documents for CSE Board recruitment.

He emphasized the need for **business sector and labor organization reps**. We thank you so much for your willingness to help us recruit for Santa Rosa County! Please let me know if you need anything further in this regard. I look forward to speaking with you again soon!

Sincerely,

**Tarae Donaldson, MPA, CWDP**  
**Director of Career Services & One Stop Operations**

CareerSource Escarosa  
6913 N. 9th Avenue  
Pensacola, FL 32504  
P: 850.607.8787  
F: 850.607.8851

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**From:** Bridgette Price <[Bridgette@santarosa.fl.gov](mailto:Bridgette@santarosa.fl.gov)>  
**Sent:** Tuesday, July 30, 2024 10:23 AM  
**To:** Donaldson, Tarae <[TDonaldson@Careersourceescarosa.com](mailto:TDonaldson@Careersourceescarosa.com)>  
**Subject:** RE: Follow Up Re: Our Recruitment Efforts

Hi Tarae,

Thanks for the update! Yes, I have been working offsite on our industrial parks so I understand. Here's the video if you have not seen it yet 😊

<https://www.youtube.com/watch?v=rUrhCoWrUnU>

**Bridgette Price**

Economic Development Project Manager

Santa Rosa Economic Development Office

6491 Caroline Street, Suite 4 | Milton, Florida 32570

P: 850.623.0174 | 850.981.2069

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Florida has a very broad Public Records Law. Virtually all written communications to or from Santa Rosa County Personnel are public records available to the public and media upon request. E-mail sent or received on the county system will be considered public and will only be withheld from disclosure if deemed confidential pursuant to State Law.

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**Re: Labor Union Organization for Board of Directors**

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**From** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

**Date** Mon 4/21/2025 3:35 PM

**To** ibewlu676@yahoo.com <ibewlu676@yahoo.com>

**Cc** Donaldson, Tarae <TDonaldson@Careersourceescarosa.com>; Sims, Janay <JSims@Careersourceescarosa.com>

Hello,

I am following up on the request for Mr. Cope to complete the documentation for review to serve on the CSE Board of Directors.

Please see email trail attached.

Respectfully,

**Marcus L. McBride, PhD**

Chief Executive Officer  
CareerSource ESCAROSA  
6913 North 9th Avenue  
Pensacola, Florida 32504  
C: 850.516.7316  
P: 850.741.4409

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**From:** ibewlu676@yahoo.com <ibewlu676@yahoo.com>

**Sent:** Monday, March 4, 2024 9:11 AM

**To:** McBride, Marcus <Mmcbride@Careersourceescarosa.com>

**Subject:** Re: Labor Union Organization for Board of Directors

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

Good Morning Mr. Marcus,

I am writing this letter on behalf of our Business Manager Mr. Cope. Mr. Cope is out on Medical Leave at the Mayo Hospital in Jacksonville. He asked me to relate the message and inform you that he will reach out when he is well enough to come back to work. If there's anything you need from me please let me know.

Thanks  
Kathryn Maiuro  
Office Manager IBEW Local 676

On Friday, March 1, 2024 at 08:53:08 AM CST, McBride, Marcus <mmcbride@careersourceescarosa.com> wrote:

Hello, Dale,

I hope all is well on your end. I am following up on the membership profile sheet and information for consideration to represent a labor union organization on the CSE Board of Directors.

Respectfully,

**Marcus L. McBride, PhD**  
*Chief Executive Officer*  
**CareerSource Escarosa**  
6913 North 9th Avenue  
Pensacola, FL 32504  
850-741-4409 (office)  
850-516-7316 (cell)

(Please excuse any typographical mistakes. This message was created on my iPhone.)

On Feb 13, 2024, at 8:02 AM, McBride, Marcus <Mmcbride@careersourceescarosa.com> wrote:

Hello, Janay,

I copied R. Dale Cole in this email. He represents IBEW and is interested in serving on our board of directors.

Please send R. Dale the appropriate profile sheet and the requirements/instructions on how to start the process.

Respectfully,

**Marcus L. McBride, PhD**  
Chief Executive Officer  
CareerSource ESCAROSA  
6913 North 9th Avenue  
Pensacola, Florida 32504  
C: 850.516.7316  
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immediately by return email and delete this message. Please note that Florida has a broad public records law, and that all correspondence to me via email may be subject to disclosure. Under Florida law email addresses are public records.

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

## Consent Item 10

### RECOMMENDATION TO SUNSET 10 CAREERSOURCE FLORIDA WORKFORCE POLICIES

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state workforce development board (SWDB) establishes and directs the vision for the state workforce system. Federal and state law describes what items the SWDB must review, approve, or consider, including workforce development policies.

CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency. CareerSource Florida and FloridaCommerce reviewed 10 workforce policies and recommends to sunset these policies from the CareerSource Florida Policy Portfolio.

1. [Workforce Policy P51](#) Medical Incapacity
2. [Workforce Policy P71](#) Food and Beverage for WIA Youth
3. [Workforce Policy P120](#) Youth Service Provider Selection
4. [Workforce Policy P102](#) Veteran Intake at Career Centers
5. [Workforce Policy P103](#) Local Veteran Employment Representative & Disabled Veteran Outreach Program
6. [Workforce Policy P112](#) Staffing Requirements (VETS)
7. [Workforce Policy P117](#) Employment and Advocacy (VETS)
8. [Workforce Policy P119](#) Consolidated Position Operational Requirements (VETS)
9. [Workforce Policy 2023.10.12.A.1](#) Standardization of Tools and Services (Strategic)
10. [Workforce Policy 2023.06.07.A.5 Career Ladder Identifier and Financial Forecaster \(CLIFF\) Strategy](#)

1. [Workforce Policy P51 - Medical Incapacity](#) related to welfare transition was created in 2005 to clarify the requirements for documenting and verifying medical incapacity for all local workforce development boards (LWDBs), and other entities engaged in implementing programs under the Temporary Assistance for Needy Families Program and the Welfare Transition Program (TANF). This guidance is outdated and unnecessary to effectively implement programs. Upon sunset of this guidance, elements of the policy will be redeveloped and issued as technical assistance by FloridaCommerce in consultation with CareerSource Florida.
2. [Workforce Policy P71 Food and Beverage for Workforce Investment Act \(WIA\) Youth](#) This is a policy created in 2012 to provide guidance to LWDBs and One-Stop Career Center employees, and other workforce system partners on CareerSource Florida's policy on food and beverage for WIA Youth. Implementation of the Workforce Innovation and Opportunity Act (WIOA) and Florida Law require elements of this outdated guidance to be updated; however, it is no longer necessary as a strategic or operational workforce policy. Upon sunset of this guidance, elements of the policy will be issued as technical assistance by FloridaCommerce in consultation with CareerSource Florida.
3. [Workforce Policy P120 Youth Service Provider Selection](#) It was revised in 2022 to provide LWDBs with criteria for awarding grants and contracts for youth workforce services under WIOA. The policy outlined procurement requirements that govern youth service provider selection. Elements of this policy are revised and combined with **Workforce Policy P95 – WIOA Youth Program Eligibility and Service Provider Selection** creating a single, leaner policy related to WIOA Youth Services. Upon sunset of this guidance and approval of the updated Workforce Policy P95, technical assistance related to WIOA Youth Program Eligibility and Service Provider Selection will be developed and issued by FloridaCommerce in Consultation with CareerSource Florida.

#### **Veteran Services Policies:**

4. [Workforce Policy P102 - Veteran Intake at Career Centers](#) It was last revised in 2021 to provide LWDBs with the minimum requirements for establishing an initial intake process for transitioning service members, veterans, and eligible spouses at career centers throughout the CareerSource Florida Network.
5. [Workforce Policy P103 - Local Veteran Employment Representative & Disabled Veteran Outreach Program](#) was last revised in 2019 to provide guidance to LWDBs on the Disabled Veteran Outreach Program (DVOP) Specialist and Local Veteran Employment Representative (LVER) outreach process.
6. [Workforce Policy P112 Staffing Requirements \(VETS\)](#) - was last revised in 2021 to provide LWDBs with the minimum staffing requirements for staff supported by the Jobs for Veterans' State Grant (JVSG) Program.

7. [Workforce Policy P117 - Employment and Advocacy \(VETS\)](#) It was developed in 2021 to provide LWDBs with the minimum requirements for providing employment and advocacy services to participants of the JVSG program.
8. [Workforce Policy P119 - Consolidated Position Operational Requirements \(VETS\)](#) It was last revised in 2021 to provide LWDBs guidance for Consolidated Position (CP) staff supported by the JVSG program.

Workforce Policies 102, 103, 112, 117, and 119 are all lengthy operational policies that provide guidance for administering workforce programs serving veterans, military, and their families. Federal statutes, guidance, and other language are repeated across these five policies, in some cases making them difficult to navigate or unnecessary as standalone policies. CareerSource Florida and FloridaCommerce worked directly with subject matter experts from LWDBs to consolidate elements of these policies into a single, leaner, revised version of **Workforce Policy P111 - Services for Veterans, Members of the Military and Spouses**. The revised Workforce Policy P111 – provides LWDBs the minimum requirements for implementing priority of service and other services for veterans, military and eligible spouses for all U.S. Department of Labor (DOL) funded programs and services.

Upon sunset of these policies and approval of the updated Workforce Policy P111, a single policy will be issued. Technical assistance related to these critical workforce programs serving veterans, military, and spouses was developed by FloridaCommerce in consultation with CareerSource Florida and will be issued to LWDBs.

#### **Statewide Standardization of Tools and Services:**

9. [Workforce Policy 2023.10.12.A.1 Standardization of Tools and Services](#) It was approved by the CareerSource Florida Board of Directors in 2023 to support partnership, encourage predictability, and ensure attainment of shared performance goals. State procured technology, tools and services shall be used by all LWDBs, local workforce development areas, and regional planning areas.
10. [Workforce Policy 2023.06.07.A.5 CLIFF Strategy](#) It was approved by the CareerSource Florida Board of Directors in 2023. This policy directs that the [Florida CLIFF Dashboard](#) and associated suite of tools shall be leveraged by LWDB leadership, career center staff, and made available to extended partners and stakeholders to prioritize employment, emphasize education and training, reduce welfare dependency, increase economic self-sufficiency, and meet employer needs.

The Statewide Standardization of Tools and Services policy aimed to support partnership and shared goals. State-procured technology, tools, and services must be used by all workforce boards and planning areas. The operational guidance is now in a different policy, **Workforce Policy O14 – Statewide Standardization of Tools and Services** provide a framework for decision-making in the acquisition of tools and services and

explains how boards can request waivers for local needs. Only one policy is needed for standardization.

The Florida CLIFF Dashboard is one example of a tool procured by CareerSource Florida provided statewide to assist LWDBs, career center staff, and stakeholders to help customers how career choices affect income and public assistance. All boards should use the CLIFF Dashboard and related tools to help customers reach economic self-sufficiency.

CareerSource Florida and FloridaCommerce worked with subject-matter experts from LWDBs to revise Workforce Policy O14 – Statewide Standardization of Tools and Services and update guidance on procurement of tools and services and the required use of state-procured tools. This updated guidance eliminates the need for Workforce Policy 2023.10.12.A.1 – Standardization of Tools and Services and Workforce Policy 2023.06.07.A.5 – CLIFF Strategy.

Upon sunset of these policies from the CareerSource Florida Policy Portfolio and the implementation of the revised Workforce Policy O14 – Statewide Standardization of Tools and Services, technical assistance will be developed by FloridaCommerce in consultation with CareerSource Florida and will be issued to LWDBs.

## **FOR CONSIDERATION**

- **Sunset 10 CareerSource Florida Workforce Policies and direct FloridaCommerce to develop and issue technical assistance in consultation with CareerSource Florida.**



Date of Issue: October 5, 2005
Office of Issue: AWI FG 05-051
Reference: Medical Incapacity

## **Final Guidance Medical Incapacity Welfare Transition Program**

---

### **Of Interest To:**

Workforce Florida, Inc., all Regional Workforce Boards, and other entities engaged in implementing programs under the Temporary Assistance for Needy Families Program and the Welfare Transition Program.

### **Subject**

Revised Guidance pertaining to noncompliance related to medical incapacity, applicants for Social Security Income (SSI) or Social Security Disability Income (SSDI) and Outpatient Mental Health or Substance Abuse Treatment. The guidance is being revised to clarify the requirements for documenting and verifying medical incapacity. Specifically, physicians must be licensed under Florida Statutes Chapter 458 or 459. Physicians are not required to use the medical verification forms developed by AWI to document the individual's condition and limitations. The Regional Workforce Board (RWB) providers should accept any form of documentation that clearly documents the individual's medical incapacity and limitations. However, the medical verification forms provided by AWI include important information for both the individual and the physician as well as a request to the physician to provide required information. The RWB may use the medical verification forms provided by AWI as a format or any regionally verification form. The guidance also deletes all reference to substance abuse/mental health treatment earned months as a result of statutory changes. by the Florida legislature.

### **Background**

Florida Statute sections 414.065 and 414.105, were amended in 1999. Florida Statute, section 414.065 (4) (d), allows Welfare Transition (WT) participants to be excused from work activities contingent upon verification by a physician licensed under Chapter 458 or Chapter 459, F.S.. The provision allows for assignment of work activities consistent with a participant's medical limitations and gives the RWB authority to require an individual to cooperate in medical or vocational assessment necessary to evaluate the individual's ability to participate in work activities. The amendment also created sections 414.065 (4) (f) and 414.105 (11). These sections of the Florida Statutes provide for an exception from participation in work activities for those who have documented a current application, including an appeal, for SSI/SSDI. These sections require the assignment of program activities based on the participant's medical ability to comply and provides for time limit extensions for persons applying for SSI/SSDI.

## I. Program Guidance

Recipients of Temporary Cash Assistance (TCA) who are referred to the WT program as mandatory are required to participate in countable work activities (445.024, F.S.) unless an exception to the work activity requirement is met (414.065 (4), F.S.). Participants who meet an exception to noncompliance as defined in 414.065 (4) are not exempt from participation and therefore, must be referred to the WT program and participate based on his or her medical ability to comply.

### A. **Noncompliance Related to Medical Incapacity, Florida Statute 414.065 (4) (d):**

Participants may not be able to participate 30 hours per week in countable work activities due to medical issues. Participants who provide a signed statement from a physician licensed under Chapter 458 or 459 of the Florida Statutes may be *excepted (excused)* from work activities.

According to the Florida Administrative Code (FAC) 65A-4.206, individuals claiming a medical incapacity that prevents them from participating in work activities or limits their participation in work activities shall be required to provide a statement from a **physician licensed under Chapter 458 or 459, F.S.**, specifying the nature of the disability or incapacity, the duration of the disability or incapacity, the number of hours per week the individual can participate in activities, the percentage of the individual's disability and any other limitations on participation in work activities<sup>1</sup>.

- Participants may not be excused from work activity requirements unless the medical incapacity is verified (a signed statement) by a physician licensed under Chapter 458 or 459, F.S.
  - Physicians licensed under 458 have license numbers that begin with the **pre-fix “ME”**, and physicians licensed under 459 have license numbers that begin with the **prefix “DO”**.
  - **Participants may provide a letter or document from the physician rather than the medical verification forms provided for regional use by AWI.**
  - **The RWB provider must make the participant aware of the information required to meet program requirements:** a statement from a physician licensed under Chapter 458 or 459, F.S., specifying the nature of the disability or incapacity, the duration of the disability or incapacity, the number of hours per week the individual can participate in activities, the percentage of the individual's disability and any other limitations on participation in work activities<sup>2</sup>.
- The RWB provider must assist the participant in developing an Individual Responsibility Plan (IRP) or Alternative Requirement Plan (ARP) necessary for the individual to resume participation. The Medical Verification Form AWI-WTP 2288(a) was developed to assist the RWBs in securing information

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<sup>1</sup> Florida Administrative Code 65A-4.206(1-3)

<sup>2</sup> Florida Administrative Code 65A-4.206(3)

regarding the participant's limitations in an attempt to engage the participant in a work activity; however, the participant may provide other documentation from the physician or assessment provider that meets the information requirements:

- Work activities shall be assigned consistent with documented limitations.
  - The ARP activities shall be assigned based on both limitations and the course of action necessary to resume participation.
- A deferral or "excuse" from work activity requirements is time limited and should be based on the medical documentation received.
  - The individual must be assigned to work activities consistent with documented limitations. The IRP or ARP should be updated to reflect medical assessment, vocational assessment, treatment plan progress, participation based on medical ability to comply. Subsequent medical documentation detailing the individual's limited abilities or inability to participate should be required every six months, at a minimum, based on local operating procedures (LOPs).

### **Evaluation of Limitations and Medical Ability to Comply**

Activities, including work activities, must be consistent with the limitations identified in the medical verification/documentation. The participant must be evaluated regarding his or her ability to participate. The RWB provider may require an evaluation, including a medical evaluation, a vocational assessment or a work evaluation to assess the participant's ability to participate in work activities. Evaluations assist in the process of developing a plan for moving the participant towards being able to comply with work activities, developing an ARP and developing a plan towards eventual self-sufficiency.

#### **1. Medical Verification Form and the Statement of Need for Care Form**

Two medical forms have been developed to assist the RWBs with securing documentation regarding the WT participant's medical incapacity, limitations and ability to comply. The Medical Verification Form has been modified and the Statement of Need for Care Form has been developed to include provisions of the Health Insurance Portability and Accountability Act (HIPAA). The Medical Verification Form, AWI-WTP 2288(a), is a three-page form that includes:

- A letter to the physician requesting the release of the client's information;
- A page disclosing the WT participant's rights and responsibilities regarding compliance;
- A page disclosing the WT participant's rights and responsibilities regarding the release of medical information;
- A request for the physician to provide information regarding restrictions on participation in both work and classroom activities; and

- A place for the physician to provide an estimated duration of the condition and the therapy or treatment plan prescribed for the participant.

The Statement of Need for Care Form, AWI-WTP 2288 (b), includes:

- A notice of rights and responsibilities for the WT participant;
- An authorization to release medical information for the individual requiring care to the RWB Provider;
- The rights and responsibilities of the individual receiving care regarding medical information and confidentiality; and
- A page to be completed by a physician licensed under Chapter 458 or 459, F.S. providing information regarding the amount of time the WT participant should be excused from work activities to provide care for the medically incapacitated adult/child.

## **2. Securing Medical Documentation**

Regions have reported that WT participants are having difficulty obtaining the completed medical documentation from the appropriate physicians. Physicians are frequently requiring payment for the completion of documents and/or requiring several visits/appointments to complete the medical form. Participants are also having difficulty scheduling timely appointments with their physicians.

### **a. Steps to assist participants in obtaining medical documentation:**

- Obtaining medical documentation could be included as a step to self-sufficiency on the IRP.
- The RWB can develop a working relationship with Medicaid physicians.
- Develop a LOP regarding the type of documentation the RWB provider may accept as suitable in lieu of the approved medical forms.

### **b. The WT program participant must secure documentation signed by a physician licensed under Chapter 458 or 459, F.S. that includes<sup>3</sup>:**

- The nature of the medical incapacity;
- The duration of the incapacity;
- The number of hours per week the individual can participate in activities;
- The percentage of the individual's disability;
- Other limitations on participation in work activities; and
- The course of treatment necessary to resume participation.

### **c. Payment for the completion of medical documentation:**

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<sup>3</sup> 65A-4.206 Florida Administrative Code

Federal Law prohibits the use of TANF funds for medical services, However, because the completion of programmatic forms by physicians is not covered by Medicaid local funds may be used for this purpose if:

- The physician does not code the completion of the form as a medical appointment and does not submit the charge to Medicaid. The charge for completing the form must be a separate charge.
- The physician charges all patients for the completion of medical documentation for non-medical providers/purposes (there is no discrimination between Medicaid and Non-Medicaid clients).
- The physician provides a receipt for the purchase of medical documentation. The receipt must be retained in the participant's record for financial and programmatic monitoring.

**B. Noncompliance Due to Medical Incapacity by Applicants of SSI or SSDI, Florida Statutes, section 414.065 (4) (f):** Individuals who have applied for SSI/SSDI and have not received a final determination from the Social Security Administration (SSA) may be “exempted” or “temporarily excused” from *work requirements* while awaiting a final determination. The term “exempt” under this subsection in Florida Statutes is not to be confused with the term “exempt” defined by eligibility determination. The participant must:

- Secure documentation from the SSA verifying a current application or appeal is on file;
- Provide medical verification regarding the nature of the medical incapacity, limitations to participation, the duration of disability or incapacity, as well as a course of treatment recommended or required; and
- Participate in program requirements according to his or her documented medical ability to comply.
- If the WT program participant provides documentation verifying an application or appeal for SSI/SSDI is on file at the SSA office, the participant may be *excused from work requirements*. **The participant is not exempt from WT program requirements. The participant must comply with an ARP that is consistent with the individual's limitations.**<sup>4</sup>

Participants who have provided verification of a SSI/SSDI application or appeal must provide documentation of his/her limitations regarding program participation from a physician licensed under Chapter 458 or 459, F.S.. The participant's ARP should be developed based on the limitations outlined in the medical documentation.

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<sup>4</sup> Florida Administrative Code 65A-4.206 (4)-(6)

- Section 414.105 (11), F.S., states persons who have applied for SSI/SSDI but have not received a final determination must continue to meet all program requirements assigned to the participant based on medical ability to comply.
- Section 414.065 (1) (b), F.S., states participants receiving TCA who are exempted from noncompliance penalties fails to comply with the alternative plan requirements will be subject to the same penalties as those who are subject to work requirements as outlined in 414.065 (a).

**C. Noncompliance Related to Outpatient Mental Health or Substance Abuse Treatment:** If a participant informs the RWB provider that (s)he is in need of substance abuse or mental health services, the participant should be referred to a Substance Abuse and/or Mental Health (SAMH) service provider. The RWB provider should be responsive to the individual and the need for an Alternative Requirement Plan. If the participant reports to the RWB provider (s)he is already involved in a treatment or mental health program, the provider should assist the participant in updating the IRP to include the alternative requirements, participation in the treatment program and documentation of the treatment.

**Counting the Hours** Florida Statutes, section 414.065 (e), allows participants to be *excused* from work activity requirements for up to **5 hours per week** to participate in a substance abuse or mental health treatment program. The participant may be excused from the work activity **for up to five hours per week** after a mental health or substance abuse professional certifies the treatment protocol and provides verification of attendance at the counseling or treatment sessions each week. If the participant requires more than five hours a week for SAMH treatment or (s)he is involved in an inpatient treatment program, it must be verified by a physician licensed under Chapter 458 or 459, F.S. An ARP must be developed that includes the:

- Assigned program requirements to remain in compliance with the WT program;
- Program and activity requirements that take into consideration the participant's medical limitations; and
- Course of treatment necessary for the individual to resume participation based on the medical documentation.

The Substance Abuse and Mental Health Treatment Verification form, CF-ES 2299, must be used to certify the participant's engagement in the treatment program. Once the participant has started the SAMH program, the SAMH counselor should complete section B of the CF-ES 2299 to verify the WT participant has started the treatment process. The RWB will communicate with the SAMH counselor and monitor participation at least monthly. The RWB provider is responsible for obtaining verification of attendance at the counseling and treatment sessions for each week. Obtaining verification may be included in the participant's IRP/ARP. The RWB should establish a LOP describing the process to document hours in treatment, how often the CF-ES 2299 should be updated and returned to the RWB

provider, as well as, a document or process to verify participation in treatment/counseling activities on a weekly basis.

Once treatment is completed, the SAMH counselor will complete section C of the SAMH Treatment Verification Form, CF-ES 2299, indicating the months that the participant fully complied with the SAMH treatment requirements and successfully completed the program. This information will then be forwarded to the RWB provider.

## **II. Forms**

[Medical Verification Form](#), AWI-WTP 2288(a)

[Statement of Need for Care Form](#), AWI-WTP 2288(b)

[Substance Abuse and Mental Health Treatment Form](#), CF-ES 2299

Date of Issue: May 7, 2012
Office of Issue: DEO FG-071
Reference: WFI Policy

## **FINAL GUIDANCE**

### **FOOD AND BEVERAGE FOR WIA YOUTH**

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#### **OF INTEREST TO**

Regional Workforce Boards (RWB).

#### **SUBJECT**

Workforce Florida, Inc. (WFI) Policy regarding food and beverage for WIA Youth.

#### **PURPOSE**

The purpose of this issuance is to provide guidance to RWBs One-Stop Career Center employees, and other workforce system partners on WFI's policy regarding food and beverage for WIA Youth.

#### **POLICY**

State and federal funds may be used to provide food, beverage or dining activities for youth enrolled and participating in workforce youth programs provided that participants are not reimbursed in excess of the state per diem amounts for the specific meal or, if contracted for by the regional workforce board, that such expenditures for all food and beverage per person per meal (including any associated costs such as, but not limited to, sales tax and service) shall not exceed those amounts stated in Florida Statutes 112.061(6)(b).

The amounts referred to in FS 112.061(6)(b) are currently:

✓ Breakfast	\$6
✓ Lunch	\$11
✓ Dinner	\$19

As a general guideline, meals (i.e., food, beverages, snacks, etc.) provided before 11 am should not exceed the breakfast rate; between 11 am and 4 pm should not exceed the lunch rate; and after 4 pm should not exceed the dinner rate. However, if the circumstances warrant, the meal designation may be changed as long as the rationale for the change is properly documented.

Local boards that provide food or beverages to youth participants must establish policies and procedures to ensure that these expenses do not exceed the amounts listed above.

#### **AUTHORITY**

Workforce Florida, Inc.





**POLICY  
NUMBER  
120**

## **Administrative Policy**

<b>Title:</b>	Youth Service Provider Selection
<b>Program:</b>	Workforce Innovation and Opportunity Act
<b>Effective:</b>	February 28, 2022

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

The purpose of this policy is to provide Local Workforce Development Boards (LWDBs) with the criteria for awarding grants and contracts for youth workforce services under the Workforce Innovation and Opportunity Act (WIOA). Additionally, this policy outlines procurement requirements that govern the youth service provider selection process.

### **II. BACKGROUND**

One of the responsibilities of LWDBs is to select providers of youth workforce services through competitive grants or contracts. LWDBs have the option of directly providing some or all youth workforce services rather than awarding grants or contracts for these services. LWDBs are encouraged to award grants or contracts to youth service providers when local areas have access to experienced and effective youth service providers.

### **III. AUTHORITY**

Workforce Innovation and Opportunity Act of 2014, [Public Law 113-128](#), Section 123

2 Code of Federal Regulations (CFR) Parts [200](#) and [2900](#)

[20 CFR 681.400](#)

[48 CFR 2.1](#)

[Training and Employment Guidance Letter \(TEGL\) No. 21-16](#), Third WIOA Title I Youth Formula Program Guidance

[Chapter 287](#), Florida Statutes

Sections [445.003](#) and [445.007\(9\)](#), Florida Statutes

[Chapter 60A-1](#), Florida Administrative Code

[2020-2024 Florida Workforce Innovation and Opportunity Act Unified Plan](#)

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

##### **A. Determination to Directly Provide Youth Services or Procure a Youth Service Provider**

LWDBs that choose to award grants or contracts for youth workforce services must do so through a competitive procurement process as required by WIOA Section 123 and the criteria established in this policy. Competition is expected to improve the delivery of efficient and effective youth workforce services. Though LWDBs have flexibility in determining which WIOA youth services to procure, LWDBs are expected to contract with youth service providers for the program elements youth service providers are best positioned to offer. The intent of this flexibility is to allow LWDBs to directly provide WIOA youth program elements they can most efficiently and cost-effectively provide, such as labor market and employment information, and framework services including assessment, intake, supportive services, and follow-up services.

If LWDBs choose to directly provide youth workforce services, situations may arise where a single entity serves multiple roles, such as fiscal agent, service provider, and/or one-stop operator. Please refer to [Administrative Policy 110 – Local Workforce Development Area and Board Governance](#) for guidance on LWDBs serving multiple functions.

##### **B. Criteria for Youth Service Provider Selection**

When LWDBs award grants or contracts to youth service providers, they must do so in accordance with the following criteria that demonstrate the ability of the provider(s) to:

- (1) Effectively provide the youth services sought by the LWDB; specifically, the execution of the 14 youth program elements.
- (2) Coordinate services with other community organizations, vendors, or the LWDB.
- (3) Provide services at a reasonable cost<sup>1</sup> and provide an accurate project budget.

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<sup>1</sup> Costs that LWDBs may want to consider in the proposed budget narrative include: program staff wages and fringe benefits, travel, supplies, materials, training costs, work experience wages, stipends, and incentives. Leveraged costs and indirect costs should be requested.

- (4) Demonstrate an understanding of the WIOA program statutory and regulatory requirements, and any other federal, state, and local policies impacting youth program operations.
- (5) Identify partners the provider will work with to help youth achieve successful outcomes.<sup>2</sup>
- (6) Offer or provide access to a continuum of services that allow participants to obtain a General Education Development or high school diploma, enroll into post-secondary education, and obtain employment within their chosen career paths, as applicable.
- (7) Utilize career pathways and sector strategy models with a structured sequence of activities, as well as multiple entry and exit points that provide adequate supportive services, as applicable.
- (8) Meet or exceed performance indicators that will be used to measure the success of the youth served by the program, and the minimum standards and targets set by the LWDB to ensure the LWDB's indicators of performance negotiated with the state for the youth program are met.
- (9) Meet established reporting requirements.
- (10) Demonstrate past performance providing youth services, if applicable.
- (11) Demonstrate strong community and business linkages to ensure the ability to develop work-based learning opportunities and meet the skill and training needs for the state's talent pipeline.

Further, LWDBs must ensure the provider has been in business for at least six months prior to submitting a bid or response to provide services and has a current business license or proof of active compliance with the Secretary of State Corporations Division. LWDBs must also ensure the provider has not been found at fault in criminal, civil, or administrative proceedings related to its performance as a training provider or educational institution, and they must disclose any pending criminal, civil, or administrative proceeding as either a defendant or a respondent.

Further, LWDBs may establish additional criteria to ensure they use providers best positioned to deliver required program elements resulting in strong outcomes for youth participants. If an LWDB establishes additional criteria, it must describe such criteria in its WIOA four-year local plan.

### **C. Phases of the Competitive Procurement Process**

Formal competitive processes may include several phases and steps, which may take place concurrently with other activities. The following phases and steps are designed

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<sup>2</sup> LWDBs are not required to procure all 14 program elements through a competitive process; therefore, the Request for Proposals might allow vendors to propose to collaborate with other organizations to leverage available resources in the community.

to ensure the competitive procurement process is open and transparent: (1) planning, (2) release and evaluation, (3) negotiation and selection, (4) implementation, and (5) closeout.

#### **D. Procurement Standards and Requirements**

LWDBs must award youth service provider grants and contracts in accordance with the procurement standards found in the Uniform Guidance at 2 CFR parts 200 and 2900, in addition to applicable state and local procurement requirements. For the acquisition of property or services required under a federal award or subaward, LWDBs must use documented procurement procedures, consistent with state and local laws and regulations and the standards outlined in 2 CFR 200.318 and further prescribed below.

General procurement requirements under WIOA must also be followed as part of the competitive process. The requirements must be consistent with Uniform Guidance and include the following.

##### **1. Written Policies and Procedures**

LWDBs must establish written policies and procedures that describe the competitive process for selecting youth service providers and the manner in which the LWDB will address the settlement of all contractual and administrative issues, such as protests, appeals, and disputes. LWDBs' documented procurement procedures must conform to the procurement standards identified in 20 CFR 200.317 through 200.327. Written policies and procedures must allow for sufficient time for all phases of the procurement process to be carried out in a manner that does not unduly restrict competition. The policies and procedures must also outline a timetable to ensure the selection of youth service providers through a competitive process is conducted at a specified frequency.

##### **2. Appropriate Methods of Competitive Procurement**

LWDBs are required to use one of the following methods of procurement:

- (1) Sealed Bids, such as an invitation for bids (IFB), pursuant to the requirements outlined in 2 CFR 200.320(b)(1).
- (2) Proposals, such as a request for proposals (RFP), pursuant to the requirements outlined in 2 CFR 200.320(b)(2).

##### **3. Full and Open Competition**

LWDBs must conduct full and open competitions for all procurement transactions.

Pre-qualified lists of potential bidders or offerors must be current, include enough qualified sources to ensure open and free competition, and must not preclude bidders and offerors from qualifying during the solicitation period.

Restricting competition is not allowed. Activities that may be considered to be restrictive of full and open competition include, but are not limited to:

- (1) Placing unreasonable requirements on firms for them to qualify to do business.
- (2) Requiring unnecessary experience and excessive bonding.
- (3) Non-competitive pricing practices between firms or between affiliated companies.
- (4) Non-competitive contracts to consultants that are on retainer contracts.
- (5) Organizational conflicts of interest.
- (6) Specifying only a “brand name” product instead of allowing “an equal” product to be offered and describing the performance or other relevant requirements of the procurement.
- (7) Any arbitrary action in the procurement process.

#### **4. Simplified Acquisition Threshold**

Procurements that exceed the simplified acquisition threshold (currently set at up to \$250,000 by 48 CFR 2.1) cannot use the small purchase procedures. LWDBs are responsible for determining an appropriate simplified acquisition threshold based on internal controls, an evaluation of risk, and its documented procurement procedures. Such procurements must not exceed \$250,000.<sup>3</sup> If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources, as determined appropriate by the LWDB.<sup>4</sup>

#### **5. Cost and Price Analysis**

When performing a competitive procurement, LWDBs must ensure the proposed costs of the youth service provider are allowable, meaning they are reasonable, necessary, and allocable. Before awarding funds to a subrecipient or vendor, LWDBs must perform a cost or price analysis to determine the reasonableness of individual cost elements and/or the overall price. Price analysis should be used to verify that the overall price offered is fair and reasonable.<sup>5</sup>

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<sup>3</sup> 2 CFR 200.320(b)

<sup>4</sup> 2 CFR 200.320(a)(2)

<sup>5</sup> 2 CFR 200.324

LWDBs must negotiate profit as a separate element of the price for each contract in which there is no price competition and, in all cases, where cost analysis is performed. To establish a fair and reasonable profit, consideration must be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.

Costs or prices based on estimated costs for contracts under the federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for the LWDB in accordance with cost principles defined in 2 CFR subpart E. LWDBs may also reference their own cost principles that comply with the federal cost principles.

Additionally, cost realism analyses must be performed on cost-reimbursement contracts to determine the probable cost of performance for each bidder or offeror.

## **6. Standards of Conduct**

LWDBs must have written standards of conduct that require fairness, objectivity, ethical standards, and other related standards of conduct during all phases of the procurement process. Written standards of conduct must address:

- (1) Mitigating apparent or real conflicts of interest. Conflicts of interest arise when the employee, officer or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated has a financial or other interest or a tangible personal benefit from a firm considered for a contract.
- (2) Disclosure of any real or apparent conflict of interest, whether individual, or organizational. Written standards of conduct must identify the process for recusal of individuals or organizations that are members of the LWDB who disclose a real or apparent conflict of interest.
- (3) A description of the firewalls and internal controls to mitigate conflict of interest in circumstances including, but not limited to, situations where an entity acts in more than one role in the one-stop delivery system or performs more than one function in the procurement process, as well as situations where the LWDB uses a sole source selection.
- (4) Confidentiality of information contained in the proposals submitted for consideration.
- (5) Not allowing any entity that develops or drafts specifications, requirements, statements of work, IFBs or RFPs, or evaluates proposals, to compete under the procurement.

## **7. Transparency and Responsibility**

The procurement process must be conducted with transparency and responsibility from the planning phase to the closeout phase. Information about the selection and certification of youth service providers must be made available to the public on a regular basis through electronic means and open meetings, as specified in rule and statute. This provides an avenue for public comment and participation in the process. Information must also be made available to state auditors and federal reviewers.

When selecting an entity as a youth service provider, LWDBs must consider the entity's integrity, compliance with public policy, record of past performance, and other factors that demonstrate transparency and responsibility. LWDBs must also ensure that a potential provider is not debarred, suspended, or otherwise excluded from or ineligible to participate in federal assistance programs or activities.

### **E. Non-Competitive Procurement of Youth Service Providers (Sole Source)**

Where the LWDB determines there are an insufficient number of eligible youth providers in the local area, such as a rural area, the LWDB may award grants or contracts on a sole source basis. LWDBs must follow the criteria outlined in 20 CFR 681.400(b)(4) and 2 CFR 200.320(c) to award sole source grants or contracts for youth services when one of the following occurs:

- (1) Services are available only from a single source.
- (2) The public exigency or emergency for the service will not permit a delay resulting from publicizing a competitive solicitation.
- (3) The United States Department of Labor or DEO expressly authorizes a non-competitive procurement in response to a written request from the LWDB.
- (4) After solicitation of a number of sources, competition is determined to be inadequate, whether for reasons of number or quality of proposals/bids.

LWDBs that use the sole source selection must prepare and maintain written documentation describing the entire process of making the selection.

### **F. Contracting with Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Firms**

LWDBs must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible, as further prescribed in 2 CFR 200.321(a).

## **G. Youth Service Provider Selection**

Any response received to publicized requests for proposals from bidders or offerors must be considered to the maximum extent practical. LWDBs must have a written method for conducting technical evaluations of the proposals received and making selections. Contracts must be awarded to the responsible bidder or offeror whose proposal is most advantageous to the LWDB, with price and other factors considered.

If the LWDB has an established standing youth committee, it may assign the committee the function of selecting youth service providers. LWDBs, or their standing youth committee, must select youth service providers best positioned to provide the required youth program elements.

## **H. Legally Binding Agreement**

Once the LWDB has competitively selected a youth service provider, the LWDB and the youth service provider must execute a legally binding agreement. At a minimum, the agreement must include the following elements:

- (1) *Statement of Work (SOW)*. The SOW specifies:
  - (a) the period of performance or the start and end date of the contract.
  - (b) the services to be performed, including measurable performance goals to be delivered under the agreement.
- (2) *Authorized Officials and Purpose*. Authorized officials are persons authorized to enter into legally binding agreements and must be on record as the signatory official. Signatures of the authorized persons must be a part of the written agreement.
- (3) *Additional Terms and Conditions*. Funding agreements must include standard terms and conditions that are required by either the federal agency, state law, or local policies. The agreement must identify that youth service providers are sub-recipients of federal funds.

## **I. Recordkeeping**

LWDBs must maintain sufficient records to detail the history of procurement in accordance with 2 CFR 200.318(i) and 2 CFR 200.333. These records must include, but are not limited to, the following:

1. All proposals/bids received.
2. Ratings of all proposals/bids received.
3. Rationale for the method of procurement.
4. Selection of agreement or contract type.



5. Selection or rejection of proposals/bids.
6. Appeals and disputes.
7. Basis for the agreement price.

LWDBs that make the selection for sole source must prepare and maintain written documentation of the entire sole source selection process. The documentation should provide evidence the review was performed by an impartial entity or organization and verify that firewalls were in place during the review of the proposals.

#### **J. Conflict of Interest**

Recognizing that membership of LWDBs is comprised of key providers and leaders from the business, workforce and education communities, and other community-based organizations, WIOA allows LWDBs to contract with members of the LWDB and standing committees for the provision of WIOA-funded services if there are processes in place to prevent or cure a conflict of interest.

When an actual or potential conflict of interest exists between the LWDB and any local board member, employee of the local board, a relative of a local board member, or employee of the local board, or an organization or individual represented by or employing a local board member, the criteria and procedures set forth in the Grantee-Subgrantee Agreement executed between DEO and all LWDBs, and any related administrative policies upon issuance, must be followed.

#### **K. Local Operating Procedures**

Local operating procedures (LOPs) guide how LWDBs operationalize policies related to the selection of youth providers. Each LWDB must develop LOPs, consistent with this policy as well as federal and state requirements that:

1. Establish the competitive procurement process that will be used to select youth service providers when the LWDB will not provide all or some youth activities.
2. Define what would constitute an insufficient number of eligible youth providers for a sole source procurement.

#### **L. State and Local Monitoring**

DEO will monitor the requirements outlined in this policy and LOPs. Additionally, LWDBs must establish local monitoring policies and procedures that include, at a minimum:

1. Roles of the youth service provider and LWDB staff; and
2. Local monitoring procedures for implementation of this policy.

When the LWDB is the youth service provider, there is an inherent conflict of interest due to the LWDB being unable to effectively monitor itself. In this circumstance, an outside organization or entity must conduct the monitoring and report the results to the Chief Local Elected Official.

## V. DEFINITIONS

**Competitive Procurement** – Also referred to as “competitive solicitation” means the process of requesting and receiving two or more sealed bids, proposals, or replies submitted by responsive vendors (bidders or offerors) in accordance with the terms of a competitive process, regardless of the method of procurement.

**Cost Analysis** – The review and evaluation of any separate cost elements and profit or fee in an offeror’s or contractor’s proposal, as needed to determine a fair and reasonable price or to determine cost realism, and the application of judgment to determine how well the proposed costs represent what the cost of the contract should be, assuming reasonable economy and efficiency.

**Cost Realism Analysis** – The process of independently reviewing and evaluating specific elements of each offeror’s proposed cost estimate to determine whether the estimated proposed cost elements are realistic for the work to be performed, reflect a clear understanding of the requirements, and are consistent with the unique methods of performance and materials described in the offeror’s technical proposal.

**Firewall** – In this context, a firewall consists of documented procedures and security measures, physical and electronic, designed to maintain a competitive environment that prevents conflicts of interest and ensures that internal processes are transparent, fair, and unbiased.

**Proposals** – A procurement method in which either a fixed price or cost reimbursement type of contract is awarded. Proposals are generally used when conditions are not appropriate for the use of sealed bids.

**Sealed Bid** – A procurement method in which bids are publicly solicited and a firm fixed-price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all material terms and conditions of the invitation for bids, is the lowest in price.

**Simplified Acquisition Threshold** – The dollar amount below which a non-federal entity may purchase property or services using small purchase methods/procedures.

**Sole Source** – Also referred to as “exceptional purchase.” Any purchase of commodities or contractual services excepted by law or rule from the requirements for competitive solicitation, including, but not limited to, purchases from a single source; purchases upon receipt of less than two responsive bids, proposals, or replies; purchases made by an agency after receiving approval from the department, from a contract procured, pursuant to s. 287.057(1), or by another agency; and purchases made without advertisement in the manner required under s. 287.042(3)(b).

## **VI. ATTACHMENTS**

[WorkforceGPS: Building Quality Request for Proposals \(RFPs\) for WIOA Youth Program Services Brief](#)

[WorkforceGPS: Contracting Strategies that Facilitate Serving Youth in Need](#)



## Administrative Policy

**POLICY  
NUMBER  
102**

<b>Title:</b>	Veteran Intake at Career Centers
<b>Program:</b>	Wagner-Peyser, Jobs for Veterans' State Grant
<b>Effective:</b>	June 9, 2021

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

The purpose of this policy is to provide Local Workforce Development Boards (LWDBs) the minimum requirements for establishing an initial intake process for transitioning service members, veterans, and eligible spouses at career centers throughout the CareerSource Florida Network.

### **II. BACKGROUND**

Florida is committed to serving transitioning service members, veterans, and their families by providing the necessary resources to prepare them to obtain meaningful careers and maximize employment and training opportunities. Florida serves transitioning service members, veterans, and their families through the Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser, Jobs for Veterans' State Grant (JVSG), and Military and Family Employment Advocacy (MFEA) employment programs.

The JVSG enables the hiring of Disabled Veteran Outreach Program (DVOP) specialists and Local Veteran Employment Representative (LVER) staff to provide employment services to veterans. JVSG is but one component of an umbrella of programs that are required by law to ensure veterans receive quality employment and training services. The JVSG staff fill a niche in that overall set of services for veterans and must be used to provide specialized services for specific segments of the veteran population, in accordance with current U. S. Department of Labor (DOL) Veteran Program Letters (VPL).

### III. AUTHORITY

[Public Law 113-128, Section 134\(c\)\(2\)](#)

[38 United States Code \(U.S.C.\), Chapter 41](#)

[38 U.S.C., Chapter 42](#)

[Training and Employment Guidance Letter \(TEGL\) 19-13](#)

[TEGL 19-13, Change 1](#)

[TEGL 19-13, Change 2](#)

[TEGL 20-13, Change 2](#)

### IV. POLICIES AND PROCEDURES

LWDBs must establish a local written procedure or policy to collect demographic information of self-attesting transitioning service members, veterans, and eligible spouses at the point of career center entry and help them understand the options and services available to them, to include priority of service and enhanced career services available through DVOP specialists, when applicable.

#### A. Identifying Transitioning Service Members, Veterans, and Eligible Spouses

LWDBs must enable transitioning service members, veterans, and eligible spouses to self-identify at the point of entry of all career centers so that they may take full advantage of priority of service and be apprised to the full range of services available to them. Veterans may be identified through several means, including, but not limited to:

- Ensuring staff (receptionists, welcome team) ask individuals at the point of entry if he/she, or his/her spouse, is currently serving, or has ever served, in the United States (U.S.) military;
- Prominent priority of service signage that encourages veterans and eligible spouses to self-identify;
- Electronic kiosk intake systems which allow the individual to self-identify as a transitioning service member, veteran, or eligible spouse; or
- Staff review of the individual's military service section of the State's Management Information System (MIS), Employ Florida.

**Note:** Veterans are identified in Employ Florida by an American flag icon.

## **B. Intake Screening for Enhanced Services**

It is expected that the Wagner-Peyser and Workforce Innovation and Opportunity Act (WIOA) programs will provide employment services to most veterans, which will permit JVSG-funded DVOP specialists to focus their efforts on eligible veterans with Significant Barriers to Employment (SBEs) and/or special populations designated by DOL, as described in [Section IV.B.2.](#) of this policy.

As such, LWDBs must establish a local written policy to ensure DVOP specialists serve targeted populations designated by DOL. The local policy must include intake procedures to screen individuals visiting the career center for the purpose of obtaining employment assistance who identify as transitioning service members, veterans, or eligible spouses for eligibility for DVOP services. LWDBs must ensure the staff member who conducts the intake screening is a non-JVSG staff member who is well-informed in the services and programs available in the career center.

To facilitate the intake screening, LWDBs must use the [Veteran Intake Form](#), or locally established equivalent, to determine the individual's service level needs and eligibility for enhanced services from a DVOP specialist. The Veteran Intake Form may be modified by the LWDB or integrated into a local electronic intake kiosk, if the core elements which identify the demographics outlined in [Sections IV.B.1](#) and [IV.B2](#) of this policy are retained.

Individuals determined eligible for DVOP specialist services must immediately be referred to a DVOP specialist. Individuals who are not found to be eligible must be provided services by the first available qualified and appropriate career center staff member. In instances where a DVOP specialist is not available, individuals who would normally be served by DVOP specialists must be served by the next available qualified and appropriate career center staff member. Services to SBE and special population veterans must not be delayed or postponed due to the unavailability of a DVOP specialist.

### **1. Eligible Veteran and Spouse**

In accordance with [Title 38, U.S.C.](#), LWDBs must apply a more narrowly defined definition of veteran (i.e. eligible veteran) or veteran/military spouse (i.e. eligible spouse) when determining eligibility for services from a DVOP specialist. LWDBs must establish a local process to ensure all individuals referred to, and/or who receive services from DVOP specialists, meet the definition of eligible veteran or eligible spouse. Individuals that meet the definition of one of the special population groups, as described in [Section IV.B.2\(i-1\)](#) of this policy, are exempt from this requirement and may be served by a DVOP specialist regardless of their status as an eligible veteran or eligible spouse.

**a) Eligible veteran means a veteran who meets any of the following:**

- i. Served on active duty for a period of more than 180 days and was discharged or released with a character of service other than dishonorable;
- ii. Was discharged or released from active duty because of a service-connected disability;
- iii. Was discharged or released from active duty by reason of a sole survivorship discharge; or
- iv. As a member of a reserve component under an order to active duty, served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with a character of service other than dishonorable.

**b) Eligible spouse means the spouse of any of the following:**

- i. A veteran who died of a service-connected disability;
- ii. A member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
  - a. Missing in action;
  - b. Captured in the line of duty by a hostile force;
  - c. Forcibly detained or interned in the line of duty by a foreign government or power;
- iii. A spouse of any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or
- iv. A spouse of any veteran who died while a total, service-connected disability was in existence.

**2. Significant Barriers to Employment and Special Populations**

In addition to meeting the definition of eligible veteran or spouse, LWDB local procedures and policies must ensure individuals referred to and/or who receive services from a DVOP specialist qualify under one of the following categories:

**a) Disabled Veteran**

A veteran of the U.S. military, ground, naval or air service who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans

Affairs, or was discharged or released from active duty because of a service-connected disability. This category of SBE is not applicable to non-veteran, eligible spouses.

This category also includes special disabled veterans, which are defined as veterans who have been rated at thirty (30) percent disabled or more, or rated at ten (10) or twenty (20) percent disabled in the case of a veteran who has been determined under [Title 38, U.S.C. 3106](#) to have a serious employment barrier.

**Note:** Veterans who have a pending disability claim with the U.S. Department of Veterans Affairs qualify for DVOP services under this category, as the LWDB must assume the decision for the veteran's claim will be in the affirmative.

**b) Homeless**

As defined in [Title 42, U.S.C. 11302\(a\) and \(b\)](#), the definition of homeless for the purpose of determining eligibility for DVOP services includes eligible veterans and spouses:

- a. Who lack a fixed, regular, and adequate nighttime residence;
- b. With a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, or camping ground;
- c. Who is living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements (including hotels and motels paid for by Federal, State, or local government programs for low-income individuals or by charitable organizations, congregate shelters, and transitional housing);
- d. Who resides in a shelter or place not meant for human habitation and who is exiting an institution where he or she temporarily resided;
- e. Who is fleeing, or is attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions in the individual's or family's current housing situation, including where the health and safety of children are jeopardized, and who have no other residence and lack the resources or support networks to obtain other permanent housing.
- f. Veterans and eligible spouses who:
  - 1) Will imminently lose their housing, including housing they own, rent, or live in without paying rent, are sharing with others, and rooms in hotels or motels not paid for by Federal, State, or local government programs for low-income individuals or by charitable organizations, as evidenced by:



- i. A court order resulting from an eviction action that notifies the individual or family that they must leave within 14 days;
  - ii. Having a primary nighttime residence that is a room in a hotel or motel and where they lack the resources necessary to reside there for more than 14 days; or
  - iii. Credible evidence indicating that the owner or renter of the housing will not allow the individual or family to stay for more than 14 days, and any oral statement from an individual or family seeking homeless assistance that is found to be credible.
- 2) Have no subsequent residence identified; and
  - 3) Lack the resources or support networks needed to obtain other permanent housing.

**c) Recently Separated, Long-Term Unemployed**

A veteran who has been separated from military service within the past three (3) years and who has been unemployed for 27 or more weeks, in the previous 12 months. The total unemployed weeks may be non-consecutive. This category is not applicable to non-veterans or eligible spouses.

**d) Offender**

An offender, as defined by [WIOA Section 3 \(38\)](#), is an individual who is currently incarcerated or who has been released from incarceration at any time.

**Note:** Individuals who were previously incarcerated but were later determined innocent or had charges dismissed are also eligible under this category.

**e) Lacks High School Diploma or Equivalent**

Eligible veterans or spouses who lack a high school diploma or equivalent.

**Note:** [The Florida Department of Education](#) provides for the award of a standard high school diploma, with no testing requirement, to eligible veterans who meet the following criteria:

- Left a public or non-public school located in any state prior to graduation and entered the armed forces of the United States;
- Is a current resident of the state of Florida or was previously enrolled in any high school in this state or was a resident of the state of Florida at the time of death; and

- Was honorably discharged from the armed forces of the United States.

**f) Low Income**

As defined by [WIOA Section 3 \(36\)](#), low income means an individual who:

- a. Receives, or in the past 6 months has received, or is a member of a family that is receiving or in the past 6 months has received, assistance through:
  - i. Supplemental Nutrition Assistance Program (SNAP); or
  - ii. Temporary Assistance for Needy Families (TANF) program; or
  - iii. Supplemental security income program; or
  - iv. State or local income-based public assistance.
- b. Is in a family with total family income that does not exceed the higher of:
  - i. The [poverty line](#); or
  - ii. Seventy (70) percent of the [Lower Living Standard Income Level](#) (LLSIL).

**g) Special Population: Veterans Ages 18 to 24**

Veterans who are between the ages of 18 to 24 at the time of application.

**h) Special Population: Vietnam Era Veterans**

The term “veteran of the Vietnam era” means an eligible veteran whose active military, naval, or air service was between August 5, 1964 and May 7, 1975 (regardless if the individual had ever been stationed or served (in-country) in the Republic of Vietnam).

In the case of a veteran who physically served in the Republic of Vietnam, the date range is expanded to the period between February 28, 1961 and May 7, 1975.

**i) Special Population: Transitioning Service Members, Capstone**

Transitioning service members are assessed on Career Readiness Standards (CRS) by unit commanders during Capstone sessions. Capstone sessions are offered to transitioning service members to help them make adequate preparations for post-military careers before they leave active duty.

When a service member is assessed as not meeting CRS (e.g., if a member does not have an adequate civilian resume), the commander then facilitates a “warm

handover” of the service member to a LWDB staff member or DVOP specialist for individualized career services. For each transitioning service member, unit commanders evaluate and document CRS and readiness for transition to civilian employment on the member’s [DD eForm 2648 - Service Member Pre-Separation / Transition Counseling and Career Readiness Standards eForm for Service Members Separating, Retiring, Released from Active Duty \(REFRAD\)](#).

**j) Special Population: Transitioning Service Members Ages 18 to 24**

Transitioning service members who are between the ages of 18 to 24 at the time of application.

**k) Special Population: Transitioning Service Members Reduction in Force**

Transitioning service members who are being separated from active U.S. military service due to a reduction in force.

**l) Special Population: Military Treatment Facility and Warrior Transition Unit**

Members of the Armed Forces who are wounded, ill, or injured and receiving treatment in a Military Treatment Facility (MTF), also known as military hospitals, or Warrior Transition Unit (WTU), also known as Soldier Recovery Units; and the spouses or other family caregivers of such wounded, ill, or injured members.

**C. Employ Florida Recording**

The provision of the veteran intake screening for DVOP eligibility must be recorded in Employ Florida using service code 159 (Initial Intake Screening – DVOP Services) and include a case note that aligns with the requirements prescribed in the [Employ Florida Service Code Guide](#). Service code 159 (Initial Intake Screening – DVOP Services) does not trigger nor does it extend participation.

**Note:** An initial assessment, as recorded by Employ Florida service code 102 (Initial Assessment) must no longer be used solely to determine eligibility for DVOP services. The purpose of the intake screening is to refer those individuals who are eligible for DVOP specialist services without delay. The first service from the DVOP specialist will be an objective assessment to determine service level needs.

The LWDB staff member conducting the veteran intake must, in addition to providing the intake screening, ensure priority of service has been explained to covered persons

in accordance with [Administrative Policy 111: Priority of Service for Veterans and Covered Persons](#).

#### **D. Exceptions**

Veterans referred by certain partner programs, or engaged during planned DVOP specialist outreach, upon verification of their eligible veteran/person status, may immediately be referred to, or served by (in certain circumstances) the DVOP specialist. Additionally, the DVOP specialist may make initial remote contact to veterans who have completed an Employ Florida registration and self-attested to having an SBE and/or are designated as a special population veteran. The exceptions to the veteran intake policy include:

##### **1. Outreach**

DVOP specialists are required to conduct outreach to areas where veterans congregate in order to engage SBE and special population veterans. If a DVOP specialist engages with a veteran during planned outreach, the DVOP may evaluate the veteran for JVSG eligibility and, if eligible, immediately provide individualized career services. The DVOP specialist must record a case note in the participant's objective assessment that states the veteran was initially engaged during outreach and record Employ Florida service code 117 in the individual's Wagner Peyser program application in accordance with the [Employ Florida Service Code Guide](#). If the DVOP specialist engages a non-eligible veteran during outreach, the DVOP specialist will refer the individual to a non-JVSG staff member to assist with any required services.

##### **2. Employ Florida**

The intake screening categories are an integrated function of the State's case management and online labor exchange system, Employ Florida. The system's individual registration and Wagner-Peyser program application capture information from the individual that indicates eligibility for DVOP services. Individuals who meet the eligible veteran or spouse criteria with an SBE, or who are designated as a special population, are identified by an SBE icon below their name.

DVOP specialists may be the initial, remote contact for eligible SBE and special population veterans and spouses who have registered in Employ Florida for the purpose of explaining and promoting available career center services, including JVSG services. This remote contact must be recorded in Employ Florida in the form of a case note. If the individual presents at the career center for employment services as a result of the DVOP specialist's contact efforts, the individual may be

immediately referred to the DVOP specialist. The DVOP must record a case note in the participant's objective assessment that states the veteran was initially engaged as a result of targeted, Employ Florida outreach.

### **3. Veteran Readiness and Employment Program, Chapter 31**

The Veteran Readiness and Employment program, formally known as Vocational Rehabilitation and Employment (VR&E), is a joint collaboration between the U.S. Veteran's Administration (VA) and the Florida Department of Economic Opportunity (DEO) to provide employment services to disabled veterans who have completed, or are about to complete, their VR&E-funded education. All veterans participating in the VR&E program are disabled veterans; therefore, they meet the SBE requirement for DVOP services.

### **4. Homeless Veteran Reintegration Program**

The Homeless Veterans' Reintegration Program (HVRP), authorized by [Title 38, U.S.C., Chapter 20](#), is an employment focused competitive grant program of the Department of Labor, Veterans' Employment and Training Service (DOL-VETS), and is the only federal grant to focus exclusively on competitive employment for homeless veterans.

In accordance with Veteran Program Letter (VPL) 03-16, HVRP grantees must ensure HVRP veterans are co-enrolled with their local career center. Co-enrollment means the HVRP participant must receive, at minimum, one program-funded service from the LWDB. This may be accomplished by having Wagner-Peyser or other non-JVSG staff assist the veteran with the following:

- a) Notification of priority of service;
- b) Orientation to available programs and services in the career center;
- c) Employ Florida account registration assistance;
- d) Ensuring the HVRP grantee's five-digit grant number is entered in the veteran tab of the veteran's Employ Florida Wagner-Peyser Program Application, as detailed in the [Virtual OneStop® User Guide for Staff, Section 5: Programs – Wagner-Peyser](#).

**Note:** Employ Florida service code 189 (Notification of Priority of Service) does not trigger program participation for the purpose of performance reporting. This process is to ensure the veteran referred by HVRP is not enrolled in the LWDB's performance unless he/she is interested in receiving workforce services.

After the veteran has been informed of priority of service and all available workforce programs, and if the HVRP veteran meets the definition of an eligible veteran/person, he/she may be referred immediately to the DVOP for services, if

desired. If the HVRP veteran is requesting employment services and does not meet the definition of an eligible veteran, they must be served by the first available non-JVSG career center staff member.

#### **E. State and Local Monitoring**

Services and activities provided under JVSG must be monitored annually for compliance with JVSG requirements by DEO. DEO will monitor local activities, policies, and procedures for alignment with the requirements outlined in this policy.

### **V. DEFINITIONS**

**Caregiver** - As defined by [Title 38, U.S.C. 1720G\(d\)](#), with respect to an eligible veteran, a caregiver means an individual who provides personal care services to support the veteran's:

- a) Health and well-being;
- b) Everyday personal needs (like feeding, bathing, and dressing); and/or
- c) Safety, protection, or instruction in their daily living environment.

**Career Center** - Also known as a One-Stop Center or American Job Center (AJC), career centers are designed to provide a full range of assistance to job seekers under one roof. Established under the Workforce Investment Act and reauthorized in the Workforce Innovation and Opportunities Act of 2014, these centers offer training referrals, career counseling, job listings, and similar employment-related services.

**Case Notes** - Online statements entered in the State MIS, Employ Florida by the staff member that identifies a participant's status for a specific data element, the date on which the information was obtained, and the career planner who obtained the information.

**Covered Person** - A veteran or eligible spouse who is entitled to priority of service as defined in Administrative Policy 111: Priority of Service for Veterans and Covered Persons.

**Disabled Veteran Outreach Program (DVOP) Specialist** - Specialists who provide individualized career services and facilitate placements to meet the employment needs of veterans and eligible persons who have significant barriers to employment or have otherwise been designated by the U.S. Department of Labor Veterans' Employment and Training Service (VETS).

**Individualized Career Services** - Services required to retain or obtain employment, consistent with [20 CFR 678.430](#). Generally, these services involve significant staff time and customization to the veteran's needs. Individualized career services include services such as: specialized assessments, developing an individual employment plan, counseling, work experiences (including transitional jobs), etc.

**Priority of Service** - With respect to any qualified job training program, a covered person shall be given priority over nonveterans for the receipt of employment, training, and placement services provided under that program, notwithstanding any other provision of law. In order to be eligible for priority of service, a veteran must have served at least one day in the active military, naval, or air service, and have been discharged or released under conditions other than dishonorable, as specified in [Title 38, U.S.C. Section 101](#).

**Remote Contact** - Customer contacts, or contact attempts, by the staff member which are facilitated through phone, text message, video conference, or electronic mail (e-mail).

**Service Connected** - Means, with respect to disability or death, that such disability was incurred or aggravated, or that the death resulted from a disability incurred or aggravated, in the line of duty in the active military, naval, or air service.

**Transitioning Service Member** - A member of the U. S. military who will separate from active service in the next 12 months, or, who will retire from active service in the next 24 months.

## VI. REVISION HISTORY

Date	Description
06/09/2021	Approved by CareerSource Florida Board of Directors.
06/10/2021	Issued by Florida Department of Economic Opportunity.

## VII. RESOURCES

[Jobs for Veterans' State Grant Disabled Veteran Outreach Program Desk Reference](#)

[Jobs for Veterans' State Grant Primer](#)

[Military Spouse Desk Reference](#)

[Veteran Intake at Career Centers Flow Chart](#)



**POLICY  
NUMBER 103**

## **Administrative Policy**

<b>Title:</b>	Local Veteran Employment Representative and Disabled Veteran Outreach Program Specialist Outreach Process at American Job Centers		
<b>Program:</b>	Wagner-Peyser / Jobs for Veterans State Grant Program		
<b>Effective:</b>	October 2, 2019	<b>Adopted:</b>	October 2, 2019

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

The purpose of this policy is to provide guidance to the Local Workforce Development Boards (LWDBs) on the Disabled Veteran Outreach Program (DVOP) Specialist and Local Veteran Employment Representative (LVER) outreach process.

### **II. BACKGROUND**

In an effort to provide support and assistance with the Jobs for Veterans State Grant (JVSG) refocusing effort referenced in Veterans Program Letter (VPL) No. 03-14 and Training and Employment Guidance Letter (TEGL) No. 19-13, the Florida Department of Economic Opportunity (DEO), with input from U.S. Department of Labor Veterans Employment and Training Service (DOL VETS), has facilitated this process to provide consistency in the outreach of LVERs and DVOP Specialists for LWDB and Career Center staff.

### **III. AUTHORITY**

[Title 38, United States Code \(38 USC\)](#), Chapters 31 and 41

Veterans Program Letter [No. 03-14](#): Expansion and Clarification of Definition of Significant Barriers to Employment for Determining Eligibility for the Disabled Veterans' Outreach Program (DVOP)

Training and Employment Guidance Letter [No. 19-13](#): Jobs for Veterans' State Grants (JVSG) Program Reforms and Roles and Responsibilities of American Job Center (AJC) Staff Serving Veterans



#### IV. LOCAL OPERATING PROCEDURES

Local Operating Procedures (LOPs) help local areas further define and clarify how programs will be operated locally and are unique to each LWDB. Each LWDB must develop LOPs to address and implement a veterans outreach process that complies with [Title 38](#), [VPL 03-14](#), and [TEGL 19-13](#). LOPs must be made available for review to ensure compliance.

DEO will monitor the requirements outlined in this policy and local operating procedures. At a minimum, LWDBs must establish LOPs for DVOP and LVER outreach that include:

##### 1. LVER Outreach

In accordance with VPL 03-14, LVERs must only be assigned duties that promote to employers, employer associations, and business groups the advantages of hiring veterans. LVER staff advocate on behalf of veterans for employment and training opportunities with business, industry, and community-based organizations. Employer outreach is an integral component of the LVER role because it builds relationships with employers within the community and opens doors to new job postings, job development opportunities, and presents the opportunity to educate employers on the positive aspects of hiring veterans. When employer outreach is primarily accomplished by a “business services team” or like entity, LVERs must be included as an active member of that team.

DEO considers inclusion of LVERs in the Business Services Team (BST) to include but not limited to:

- Attending meetings held or facilitated by the BST; or
- Receiving the same type and quality of outreach related training provided to the BST;
- Accompanying BST members on employer visits to facilitate employment, training, and placement services furnished to veterans;
- Not spending a majority of their time providing job order follow-up for employers they do not have a relationship with;
- Accurately entering all services into Employ Florida provided to employers, to include those instances when the services were provided in conjunction with a BST member;
- Not being solely assigned federal contractors/employers;
- Developing and cultivating their own employer relationships and should not be required to provide BST members their “contacts” to assist the BST member with meeting performance benchmarks;
- Serving as an advocate for employment and training opportunities with businesses, industries and community-based organizations.

LVERs should advocate for all veterans served by the AJC with business, industry, and other community-based organizations by participating in appropriate activities such as:

- Planning and participating in job and career fairs;
- Conducting employer outreach;
- In conjunction with employers, conducting job searches and workshops, and establishing job search groups;

- Coordinating with unions, apprenticeships programs and businesses or business organizations to promote and secure employment and training programs for veterans;
- Informing federal contractors of the process to recruit qualified veterans;
- Promoting credentialing and licensing opportunities for veterans; and
- Coordinating and participating with other business outreach efforts.

## 2. DVOP Outreach

In accordance with VPL 03-14, in the event a DVOP specialist does not have a full case-load of eligible veterans and eligible spouses, DVOPs should conduct relationship building, outreach and recruitment activities with other service providers in the local area, to enroll significant barriers to employment (SBE) and priority category veterans in an American Job Center.

DVOP outreach should include but is not limited to locations such as:

- Veteran Centers, Veterans Affairs Medical Centers and outpatient clinics
- Homeless Shelters
- Community based and civic organizations
- Veterans' Service Organizations
- Vocational Rehabilitation Offices
- Workforce Partners and Service Providers
- Veterans' Affairs Coordinators at Colleges/Community Colleges to promote services to veterans and solicit VA Work-Study Assistants
- Faith-Based Organizations
- Military Base Family Service/Support Centers
- Other legitimate venues and locations where veterans with SBEs congregate

DVOPs should receive training from the LWDBs to ensure they conduct outreach and represent the LWDB in accordance with locally established outreach guidelines.

DVOPs must fully and accurately code and case note all services provided during outreach activities.

## V. STATE AND LOCAL MONITORING

Direct services and activities provided by the Jobs for Veterans State Grant (JVSG) staff must be monitored annually for compliance with JVSG requirements by DEO. At a minimum, LWDBs must establish local monitoring policies and procedures that include the requirements outlined in this policy.

## VI. RESOURCES

[Employ Florida Service Code Guide](#)  
[Veterans' Program Letter No. 03-14](#)  
[Veterans' Program Letter No. 03-14, Change 1](#)  
[Veterans' Program Letter No. 03-14, Change 2](#)  
[Training and Employment Guidance Letter No. 19-13](#)

[Training and Employment Guidance Letter No. 19-13, Change 1](#)

[Training and Employment Guidance Letter No. 19-13, Change 2](#)



## Administrative Policy

**POLICY  
NUMBER 112**

<b>Title:</b>	Staffing Requirements
<b>Program:</b>	Jobs for Veterans' State Grant
<b>Effective:</b>	June 9, 2021

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

The purpose of this policy is to provide Local Workforce Development Boards (LWDBs) the minimum staffing requirements for staff supported by the Jobs for Veterans' State Grant (JVSG).

### **II. BACKGROUND**

The JVSG is a federally-funded, formula-based staffing grant that supports the hiring of staff to provide individualized career and training-related services to veterans and eligible persons with Significant Barriers to Employment (SBE) and to assist employers in filling their workforce needs with job-seeking veterans and eligible spouses. Florida is currently the third largest recipient of JVSG funding in the nation.

As a condition to receive funding, the Florida Department of Economic Opportunity (DEO) must submit a grant application and state plan narrative to the U.S. Department of Labor Veterans' Employment and Training Service (DOL VETS) every three years. This plan includes, but is not limited to, a description of the populations of veterans that will receive targeted services, provisions for priority of service for veterans, and performance goals. Each year thereafter, DEO must submit an Annual Funding Modification to the approved state plan to describe any adjustments to the plan narrative and affirm the total number of full-time positions that will be supported by the State's JVSG funding allocation.

### **III. AUTHORITY**

[Title 20, Part 678](#)

[38 United States Code \(U.S.C.\), Chapter 41](#)

[Veterans Program Letter \(VPL\) 01-19](#)

[VPL 03-14](#)

[VPL 03-14, Change 1](#)

[VPL 03-14, Change 2](#)

#### IV. POLICIES AND PROCEDURES

Florida has established a fully integrated workforce services delivery system with DEO as the designated entity responsible for the administration of all workforce services programs, including the JVSG. The Department provides workforce services through Florida's 24 chartered LWDBs and their network of local CareerSource Career Centers.

JVSG-funded staff are fully integrated into the career center to form a comprehensive team that provides services to veterans that address their employment and training needs. LWDBs have assigned JVSG-funded staff allocated according to veteran population and the needs of the community. JVSG-funded staff are state merit staff, jointly managed by the LWDBs in accordance with current grantee-subgrantee agreements.

##### A. JVSG-Funded Staff

The JVSG supports the salary, benefits, and fair-share cost of staff positions employed under a merit personnel system. These staff are included among the comprehensive career center required partner staff, which consists of all staff employed by programs or activities operated by partners listed in [20 CFR 678.400](#).

The JVSG program, in and of itself, does not constitute the entirety of Florida's veterans' services. Rather, the program is a partner within Florida's workforce development system. The JVSG program fills a specific role in the career center delivery of services to specific veterans and other eligible persons. The JVSG program directly supports the following positions:

1. **Disabled Veteran Outreach Program (DVOP) Specialist:** DVOP specialists are jointly managed staff assigned to the LWDB to provide individualized career services to SBE veterans and other eligible individuals through the case management process in accordance with Title 38, U.S. Code and current Veteran Program Letters (VPLs). The LWDB must fill DVOP positions with eligible veterans and give preference to those with disabilities as defined in [Title 38, U.S.C. 4103A](#) with priority given to special disabled veterans and then disabled veterans.
2. **Local Veteran Employment Representative (LVER):** LVER staff are jointly managed staff assigned to the LWDB who actively advocate for employment and training opportunities with business, industry, and community-based organizations on behalf of veterans, consistent with Title 38, U.S. Code and current VPLs. LVER

positions are filled in accordance with [Title 38 U.S.C. 4104](#); with priority given to disabled veterans and then eligible veterans.

3. **Consolidated Position (DVOP/LVER):** A JVSG-funded staff person who performs both the duties of the DVOP Specialist and LVER. Consolidated DVOP/LVER positions must promote a more efficient administration of JVSG program services to employers and veterans, with an emphasis on veterans with disabilities.

## **B. Local Staffing Level Designations**

The JVSG program consists of, at minimum, both a LVER and DVOP specialist, or, a Consolidated Position (DVOP/LVER). The deliberate assignment of JVSG staffing levels to LWDBs is paramount to the success of the JVSG program. The proportion of DVOP and LVER staff, as well as the total number of JVSG-funded, full-time positions assigned to each LWDB, is determined by DEO through an analysis of veteran population using data compiled from the Department of Veterans Affairs National Center for Veteran Analysis and Statistics. The statewide, total number of JVSG-funded, full-time positions, by classification, is tracked and maintained by the State Veterans' Program Coordinator (SVPC) and submitted annually to USDOL VETS.

LWDBs may request a modification to the proportion of DVOP and LVER staff or the number of JVSG-funded positions in their local area by submitting a written justification for the requested changes to the SVPC at [VETS@deo.myflorida.com](mailto:VETS@deo.myflorida.com). LWDBs are not authorized to eliminate or modify JVSG-funded positions without approval from DEO.

## **C. JVSG-Funded Position Vacancies**

In accordance with [U.S. Code, Title 38, Chapter 41](#), the state is required to expend JVSG funds in accordance with planned budgets submitted to USDOL VETS. To ensure JVSG funds are expended within the grant period, LWDBs must ensure JVSG-funded position vacancies are posted and filled with qualified veterans in a prompt manner. Failure to properly staff JVSG-funded positions may result in a loss of JVSG program funding and subsequently impact the State's ability to serve Florida's veterans.

JVSG-funded vacancies must be advertised and filled through the People First Job Center at <https://jobs.myflorida.com>. LWDBs may post vacancies through the People First Job Center immediately upon learning of the anticipated vacancy, there is no requirement to wait until the position is vacant. The LWDB may use a single posting to fill multiple vacancies for a period of up to 6 months. LWDBs may contact the DEO Bureau of Human Resource Management for assistance regarding posting vacancies through the People First Job Center.

JVSG funds may be used to support the advertising of JVSG vacancies through private job boards (i.e. Indeed, Monster) in addition to Employ Florida; however, applicants

must be redirected to apply through the People First Job Center. Cross-advertising may increase the pool of qualified veteran candidates and allow greater flexibility with regards to the nomenclature of the position title.

LWDBs must ensure JVSG-funded positions are filled with a qualified veteran by submitting a completed hiring package to DEO within 50 days of the position becoming vacant. LWDBs who are unable to meet this timeline must provide notification to the SVPC with written justification for any foreseen delay in filling the vacancy within 25 days of the position becoming vacant. Notifications may be sent to the SVPC via email at [VETS@deo.myflorida.com](mailto:VETS@deo.myflorida.com). The SVPC may provide written approval for any delay in filling vacancies for extenuating circumstances, if deemed appropriate by DEO.

#### **D. Pass-Through Funding**

JVSG funds are awarded to pay for specialized staff that provide services to veterans and other eligible persons. DEO is required to provide USDOL VETS a quarterly analysis to ensure the majority of JVSG expenditures are used to support salaries for personnel and fringe benefits.

Pass-through funding is issued to LWDBs in a manner which ensures DEO remains in alignment with JVSG requirements. If a LWDB is not receiving sufficient pass-through funding to support the fair share cost of JVSG staff, they may submit a written request for additional funding to [VETS@deo.myflorida.com](mailto:VETS@deo.myflorida.com). Upon review and approval by the SVPC and [DEO's Bureau of Financial Management](#), additional funds may be issued.

Pass-through funding provided by JVSG to LWDBs must be expended in accordance with federal cost principles outlined in [2 CFR 200, Subpart E](#). LWDBs who have specific questions regarding allowability of specific costs should contact DEO's Bureau of Financial Management for assistance.

#### **E. National Veterans' Training Institute Mandatory Training**

All JVSG-funded staff must attend a mandated training offered by the National Veterans' Training Institute (NVTI) located in Dallas, Texas and administered by Management Concepts, Inc. This training must be completed within 18 months of the position start date. All costs for training, to include travel and lodging, are provided for by the JVSG. The SVPC will coordinate with individual LWDBs to schedule NVTI training for JVSG-funded staff.

**Note:** Training opportunities through NVTI are available for LWDB Executive Directors, career center managers, and other relevant non-JVSG staff, as approved by the DOL VETS State Director and the requestor's management. If approved, all costs for training, to include travel and lodging, are provided for by the JVSG. A full list of available trainings is located at <https://www.nvti.org/Training/Class-Descriptions>. To

request training for non-JVSG staff, LWDBs must submit a NVTI Training Application Form (Attachment A) to the SVPC by email at [VETS@deo.myflorida.com](mailto:VETS@deo.myflorida.com).

## **F. Monitoring**

Local JVSG programs must be monitored annually for compliance with state and federal requirements by DEO. DEO will monitor the requirements outlined in this policy and local operating procedures. Additionally, LWDBs must establish local monitoring policies and procedures that include, at minimum:

- a) The duties assigned to DVOP specialists and LVER staff by the LWDB;
- b) The way DVOP specialists and LVER staff are integrated into the LWDB's employment service delivery system; and
- c) Local monitoring procedures for implementation of this policy.

## **V. DEFINITIONS**

**Disabled Veteran** - A veteran who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary, or a person who was discharged or released from active duty because of a service-connected disability.

**Eligible Spouse** - Spouse of any of the following:

- a) Any veteran who died of a service-connected disability;
- b) Any member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
  - i. Missing in action;
  - ii. Captured in line of duty by a hostile force; or
  - iii. Forcibly detained or interned in line of duty by a foreign government or power;

**Eligible Veteran** - A person who:

- a) Served on active duty for a period of more than 180 days and was discharged or released therefrom with other than a dishonorable discharge;
- b) Was discharged or released from active duty because of a service-connected disability;
- c) As a member of a reserve component under an order to active duty pursuant to section 12301(a), (d), or (g), 12302, or 12304 of title 10, served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge; or



- d) Was discharged or released from active duty by reason of a sole survivorship discharge (as that term is defined in [Title 10, 1174\(i\)](#)).

**Significant Barrier to Employment** - A barrier that impedes the veteran from employment as designated by DOL, outlined in [Administrative Policy 102: Veteran Intake at Career Centers](#).

**Special Disabled Veteran** - A veteran who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary for a disability rated at 30 percent or more, or rated at 10 or 20 percent in the case of a veteran who has been determined to have a serious employment handicap; or a person who was discharged or released from active duty because of service-connected disability.

## VI. ATTACHMENTS

A. [NVTI Training Application Form](#)

## VII. REVISION HISTORY

Date	Description
06/09/21	Approved by CareerSource Florida Board of Directors.
06/10/21	Issued by Florida Department of Economic Opportunity.



## Administrative Policy

**POLICY  
NUMBER  
117**

<b>Title:</b>	Employment and Advocacy Services		
<b>Program:</b>	Jobs for Veterans State Grant		
<b>Effective:</b>	August 20, 2021	<b>Revised:</b>	September 27, 2021

### I. PURPOSE AND SCOPE

The purpose of this policy is to provide Local Workforce Development Boards (LWDBs) the minimum requirements for providing employment and advocacy services to participants of the Jobs for Veterans' State Grant (JVSG) program.

### II. BACKGROUND

With funding from the U.S. Department of Labor Veterans Employment and Training Service (DOL VETS), the Florida Department of Economic Opportunity (DEO) assigns JVSG-funded Disabled Veterans Outreach Program (DVOP) specialists, Local Veterans' Employment Representatives (LVERs), and Consolidated Positions (CP)<sup>1</sup> to LWDBs.

Florida's JVSG program prepares veterans, transitioning service members, and eligible spouses for meaningful careers. DVOP specialists provide individualized career services to eligible veterans and persons experiencing significant barriers to employment, with an emphasis on assisting veterans who are economically or educationally disadvantaged. LVER staff conduct outreach to employers and business associations to engage in advocacy efforts with hiring executives to develop employment opportunities for veterans and encourage the hiring of veterans. CP staff serve in a dual role as both DVOP specialist and LVER.

### III. AUTHORITY

[38 United States Code \(U.S.C.\), Chapter 41](#)

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<sup>1</sup> All requirements established in this policy for DVOP specialists and LVER staff are applicable to CP staff and must be adhered to when performing the respective role of the DVOP specialist or LVER.

[38 U.S.C., Chapter 42](#)

[Veterans Program Letter \(VPL\) 07-09 \(Implementing Priority of Service for Veterans and Eligible Spouses in all Qualified Job Training Programs Funded in Whole or in Part by the U.S. Department of Labor\)](#)

[VPL 07-10 \(Refocused Roles and Responsibilities of Jobs for Veterans State Grant Funded Staff\)](#)

[VPL 03-14 \(Jobs for Veterans' State Grants \(JVSG\) Program Reforms and Roles and Responsibilities of American Job Center \(AJC\) Staff Serving Veterans\)](#)

[VPL 03-14, Change 1 \(Expansion and Clarification of Definition of Significant Barriers to Employment for Determining Eligibility for the Disabled Veterans' Outreach Program \(DVOP\)\)](#)

[VPL 03-14, Change 2 \(Expansion and Clarification of Homeless Definition as a Significant Barrier to Employment \(SBE\)\)](#)

[VPL 07-14 \(American Job Center \(AJC\) participation in Capstone Activities and other Outreach to Transition Service Members\)](#)

[VPL 03-19 \(Designation of Additional Population of Veterans Eligible for Services from the Disabled Veterans' Outreach Program Specialist - Veterans Ages 18 to 24\)](#)

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

Upon determination of a jobseeker's eligibility as prescribed in [Administrative Policy 102: Veteran Intake at Career Centers](#); DVOP specialists and LVER staff must facilitate employment services to eligible persons as described in this policy.

##### **A. Disabled Veterans Outreach Program Specialists**

In accordance with [Title 38, U.S.C. 4103A](#), DVOP specialists facilitate individualized career services to eligible persons through the case management framework<sup>2</sup>. The purpose of individualized career services is to provide eligible veterans and spouses the necessary information and customized support for obtaining sustained employment. Case management assists participants by evaluating the individual's service level needs, establishing an employment plan, delivering services, and providing consistent contact through a proactive and structured framework. DVOP specialists must emphasize a customer-focused approach, which recognizes that the eligible persons

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<sup>2</sup> The minimum service requirements of the case management framework are the provision of an objective assessment, the joint development of a written IEP, and consistent contact.

they serve are individuals who may require services that are tailored to their specific needs, situations, and goals.

## **B. Career Services and Employ Florida Reporting**

Services provided to eligible individuals must be recorded in the State's online labor exchange and case management system, Employ Florida. DVOP specialists must facilitate the creation, or update, of the eligible person's individual registration and Wagner-Peyser Program Application in accordance with Section 3: Manage Individuals and Section 4: Programs - Wagner-Peyser of the [Virtual OneStop® User Guide for Staff](#).

**Note:** Veterans who are participating in the U.S. Department of Veterans Affairs' Veteran Readiness and Employment (VR&E) Chapter 31 Program and/or the U.S. Department of Labor's Homeless Veteran Reintegration Program (HVRP) must be recorded as such in the Veteran page of the Wagner-Peyser Program Application by clicking the respective radio button, and for HVRP participants, by selecting the appropriate HVRP Program Grantee.

DVOP specialists must enroll eligible persons into the JVSG sub-program by entering a JVSG eligibility date on the Intro page of the Wagner-Peyser Program Application. Once the eligible person's individual registration and Wagner-Peyser Program Application has been created, DVOP specialists must document employment services in the participant's Employ Florida Wagner-Peyser program application by recording the service code which corresponds to the service provided, as follows:

<b>Service Code</b>	<b>Service Code Description</b>	<b>Individualized Career Service</b>
V01	JVSG - Objective Assessment <sup>3</sup>	Yes
V02	JVSG - Specialized Assessments	Yes
V03	JVSG - Individual Career Counseling	Yes
V04	JVSG - Individual Employment Plan Update	Yes
V05	JVSG - Short-term Prevocational Services	Yes
V06	JVSG - Coordination of Wraparound Services	No
V07	JVSG - Work Experience	Yes
V08	JVSG - Workforce Preparation Activities	Yes
V09	JVSG - Consistent Contact	No
V10	JVSG - DVOP Outreach Engagement	No
V11	JVSG - Work Readiness Case Conference	No
205	Individual Employment Plan	Yes
500	Referred to Job Over 150 Days	No
114	Staff-Assisted Job Search	No

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<sup>3</sup> The Objective Assessment must be the initial service provided to the eligible person to initiate JVSG participation.

**Note:** There may be other services that are provided, but the services indicated in the table above are the primary services to be administered by DVOP specialists to assist eligible persons. All services recorded, including those not listed in the chart above, must be recorded under the JVSG customer group in the veteran or eligible person's Wagner-Peyser Service Plan.

## 1. Objective Assessment

DVOP specialists must conduct an objective assessment for eligible persons to determine the appropriate service level and path to obtain employment. The objective assessment is performed using in-depth interviewing and evaluation to identify barriers and appropriate employment goals. The objective assessment must be the first service provided to the veteran by the DVOP specialist. Additional DVOP specialist service codes are contingent on the objective assessment being present in the participant's program application; meaning, no other services may be recorded until the objective assessment has been recorded successfully.

The objective assessment will serve as the foundation and justification for all services and should guide the development of the participant's Individual Employment Plan (IEP). The assessment must include a detailed examination of the participant's qualifications, skills, and capabilities and explore any relevant barriers that may hinder the participant's ability to secure sustainable employment. This examination may include, but is not limited to, a review of the JVSG participant's:

- a. Attitude towards work
- b. Current labor market opportunities
- c. Educational background
- d. Emotional and physical health (including disabilities)<sup>4</sup>
- e. Employment history
- f. Financial situation
- g. Justice involvement
- h. Transportation
- i. Motivation
- j. Wrap-around service needs

All elements of the objective assessment must be completed using the Employ Florida Objective Assessment Summary. Staff must also include an overall note (located on the Objective Assessment Summary General tab) that includes the following:

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<sup>4</sup> Specific details about participant physical and emotional health must not be documented in Employ Florida, nor stored in the participant's electronic or hard-copy case file.

- i. The Significant Barrier to Employment (SBE) or Special Population Group which affirms the participants eligibility for DVOP specialist services; and
- ii. A summary of the assessment's findings, to include the participant's barriers to employment, occupational skills, and education.

Instructions on how to administer an objective assessment through the Objective Assessment Summary are available in the [Virtual OneStop® User Guide for Staff, Section 4: Individuals - Case Management](#). The objective assessment must be recorded in Employ Florida using service code V01 (JVSG - Objective Assessment) and include the required documentation that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

**Note:** If an objective assessment has already been completed by another DVOP specialist or partner program staff, the DVOP specialist may reaffirm the results from that assessment. If any elements of the Employ Florida Objective Assessment Summary are missing, the DVOP specialist must administer the missing elements. If the objective assessment completed by partner program staff was not completed using the Employ Florida Objective Assessment Summary, the DVOP specialist must create a new objective assessment using the Employ Florida Objective Assessment Summary.

## 2. Specialized Assessments

Specialized assessments help establish a participant's skill level and service needs. The DVOP specialist may use a multi-faceted approach to the specialized assessment process by referring the participant to, and receiving the results of, an assessment which examines one or more of the following categories:

- a. Basic literacy in math, reading, or writing
- b. English language proficiency
- c. Interests and aptitude
- d. Occupational skill levels
- e. Transferable skills

The results of the assessment must be used to inform the participant of career and/or training opportunities. Without assessment results, a mere referral does not constitute a specialized assessment. Specialized assessments may also be provided through the Workforce Innovation and Opportunity Act (WIOA) program, which will require the DVOP specialist to assist the participant with scheduling the assessment(s). When referring participants to WIOA for specialized assessments, this service must be recorded using service code 211 (Referral to WIOA). The case note should indicate how the DVOP specialist helped facilitate the referral along with the results from the specific assessment referred to.

DVOP specialists may assist participants who qualify for, or are already receiving, Department of Veteran Affairs (VA) education benefits, with completing the CareerScope® specialized assessment at: <https://va.careerscope.net/gibill>. CareerScope® is a no-cost, online assessment tool that measures the participant's interests and skill levels and helps determine suitable career paths. The tool also recommends courses or training programs that can help the participant become more marketable in the selected occupations.

**Note:** DVOP specialists may administer additional specialized assessments beyond CareerScope® in accordance with LWDB policy and procedures.

The results of the specialized assessment must be recorded in Employ Florida using service code V02 (JVSG - Specialized Assessment) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

### **3. Individual Career Counseling**

Individual career counseling may be provided by the DVOP specialist following the objective assessment to assist the participant in making informed educational, training, and occupational choices and may include the following:

- a. Assisting in developing a participant's knowledge of educational and occupational opportunities, and/or the steps involved in career planning;
- b. Assisting in developing career goals by using sound information including appropriate assessments and career explorations that focus on the talents, knowledge, transferable skills, interests, values, and aptitudes of the participant;
- c. Interpreting the local job market(s) and providing the steps necessary for the participant to obtain and retain employment in an occupation of the participant's interest;
- d. Providing specific information about job duties, working conditions, and hiring requirements of occupational areas of interest; and
- e. Helping a participant explore and select occupational skills for training opportunities.

Individual career counseling must be recorded in Employ Florida using service code V03 (JVSG - Individual Career Counseling) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

### **4. Individual Employment Plan**

The IEP is a negotiated agreement between the participant and the program detailing what the participant will do to obtain/return to employment and what the program will do to support the participant's efforts. The IEP must include a clear employment goal and outline the steps necessary (objectives) to achieve the goal.

The IEP must address any barriers that may prohibit the participant from achieving the goal.

**a. Developing the Individual Employment Plan**

The IEP must be created using the Employ Florida IEP/Service Strategy wizard<sup>5</sup>. Instructions on how to create an IEP using the Employ Florida IEP/Service Strategy wizard are available in the [Virtual OneStop® User Guide for Staff, Section 4: Individuals - Case Management](#). The Employ Florida system will automatically generate a service code 205 (Individual Employment Plan) upon initial creation. The IEP should be signed by the participant and must be retained in the participant's file. No case note is required if the plan is developed in accordance with this policy.

Employ Florida only allows for one IEP per participant. If the participant has an existing IEP in Employ Florida, the DVOP specialist must determine if the IEP is still active and work with the program partner who created the existing IEP to determine if the plan should be closed or will require joint coordination. An IEP that is coordinated across multiple programs requires constant communication between the DVOP specialist and partner program staff to maximize the effectiveness of the plan and prevent the duplication of services.

**b. Establishing an Employment Goal and Objectives**

The IEP must have one employment goal that drives the plan. The employment goal must contain three (3) dates: date established, review date<sup>6</sup>, and anticipated completion date. Once established, IEP goal and objective dates must not be altered in Employ Florida. The description of the employment goal should be written in a manner that is succinct and pertinent. Additional details regarding the employment goal must be included in the Goal Details text box. The term of a goal can be identified as long-term (12+ months), intermediate (3-12 months), or short-term (0-3 months).

The objectives of the IEP break down the larger goal into comprehensive steps that assist the participant in reaching the employment goal. Effective objectives identify individual tasks to be completed and must include the date the objective was established and review dates for completion.

DVOP specialists must adjust their Employ Florida IEP alert subscription to notify when a goal or objective is nearing the review date by following the

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<sup>5</sup> HVRP participants that have an existing employment plan developed by the HVRP grantee that meets the criteria set forth in this policy are not required to create a duplicate plan with the DVOP specialist. The DVOP specialist must coordinate with the HVRP case manager to maximize the effectiveness of the plan and prevent the duplication of services.

<sup>6</sup> At minimum, review dates should be established within 15-days from the anticipated completion date.



instructions in the [Virtual OneStop® User Guide for Staff, Section 31: Manage Communications](#).

An effective IEP should use the S.M.A.R.T. principle to create specific, measurable, attainable, relevant, and time-bound goals and objectives, as described below:

- i. **Specific** goals are easy to comprehend and clearly indicate what the participant intends to do. Specific objectives are the action steps outlining exactly what the participant should do in order to achieve the goal.
- ii. **Measurable** goals have benchmarks allowing participants to see progress towards successfully achieving the goal. Goals are measurable by establishing objectives to show progress.
- iii. **Attainable** goals and objectives can be realistically expected to be completed within the timeframe given.
- iv. **Relevant** goals and objectives must be relevant to what the participant is trying to achieve. A relevant goal is based on the participant's work history, education, training, special skills, interests, and aptitudes.
- v. **Time-bound** goals and objectives should be limited to a defined period and include a specific timeline for each step of the process.

#### c. **Reviewing and Updating the Individual Employment Plan**

The IEP must be treated as a living document and reviewed with the participant by the DVOP specialist on a regular basis. At a minimum, the IEP must be reviewed with the participant every 30 days to ensure the participant's progress in completing objectives. The IEP must be amended, as appropriate, when additional needs are identified, or objectives are achieved.

Once created, the goal and objective(s) must not be altered. Objectives that no longer align with the participant's employment goal, or have exceeded the anticipated completion dates, must be closed to reflect unsuccessful completion and include an accompanying case note in the summary section of the respective objective indicating the reason for change or unsuccessful completion (e.g., unexpected emergency, relocation, change in career path, etc.). Once the objective has been closed, a new objective may be created to replace the unsuccessful objective with consent and collaboration from the participant. When new objectives are added, the IEP should be reviewed and signed by the participant and the DVOP specialist.

Updates to the IEP must be recorded by service code V04 (JVSG - Individual Employment Plan Update) and include a case note that describes the update

made to the employment plan (e.g., objective added/completed, additions to goal/objective description, etc.).

**Note:** In the event that a DVOP specialist vacates their position or is dismissed, LWDBs must establish a local policy outlining the procedure to transfer the departing DVOP specialist's JVSG participants to another DVOP specialist or career center staff member that ensures the continued uninterrupted provision of services.

## **5. Short-Term Prevocational Services**

DVOP specialists may provide short-term prevocational services to help participants attain and maintain sustained employment. Short-term prevocational skills include communication and interviewing skills, punctuality, study skills, professional conduct, and basic computer literacy and competencies. Short-term prevocational services also include providing counseling on workplace expectations, professional conduct, and personal maintenance, when appropriate.

The provision of short-term prevocational services must be recorded in Employ Florida using service code V05 (JVSG - Short-term Prevocational Services) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

## **6. Coordination of Wraparound Services**

In order to effectively provide a wholistic level of service, the DVOP specialist must develop a comprehensive network of partner/community resources to provide participants the necessary wraparound services required for overcoming barriers. The resource network may include, but not be limited to:

- a. [American Legion](#)
- b. Community leaders
- c. [Department of Veterans Affairs](#)
- d. [Disabled American Veterans](#)
- e. Faith-based organizations
- f. [Food banks](#)
- g. [Goodwill](#)
- h. Homeless Shelters
- i. [Homeless Veterans Reintegration Program](#)
- j. [Housing Urban Development - Veterans Affairs Supportive Housing](#)
- k. [Iraq and Afghanistan Veterans of America](#)
- l. [Legal Assistance](#)
- m. [Marine Corps League](#)
- n. [Salvation Army](#)
- o. [Supportive Services for Veteran Families](#)

- p. [Veteran Readiness and Employment Program \(Chapter 31\)](#)
- q. [Veteran Service Officers](#)
- r. [Veterans of Foreign Wars](#)
- s. [Vocational Rehabilitation](#)

Once the resource network has been established, the DVOP specialist must do more than refer the participant to local resources or community partners; they must take an active role in assisting the participant access the resources requested (e.g., providing a direct referral, scheduling an appointment, assisting to prepare necessary documentation, and conducting consistent contact to determine the outcome of the referral). The DVOP specialist must coordinate wraparound services to assist the participant in overcoming any barriers specified in the objective assessment; as doing so will demonstrate the program's value and its commitment to the participant's success.

The coordination of wraparound services must be recorded by service code V06 (JVSG - Coordination of Wraparound Services) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

**Note:** It is encouraged that local management have DVOP specialists maintain referral outcome records to establish best practices and overall resources gained from the referral activities. These records should be reviewed on a quarterly basis to ensure referral activities are productive.

## 7. Work Experience

DVOP specialists may place JVSG participants in work experience opportunities through the Workforce Innovation and Opportunity Act (WIOA) or other programs to provide work-based opportunities to practice and enhance the skills and knowledge gained from their military service, program of study, or industry training program.

Work experience is a structured learning experience that takes place in a workplace for a limited period and may be paid or unpaid. Work experience must include academic and occupational education concurrently or sequentially. Work experience opportunities include, but are not limited to:

- a. Apprenticeships;
- b. Department of Defense SkillBridge Program;
- c. Internships;
- d. Job shadowing;
- e. Pre-apprenticeship programs;
- f. Transitional jobs; and
- g. Veterans Affairs Work Study Program.

A work experience should be related to the participant's employment goal. The assessment process and development of the IEP will help to identify appropriate worksites for each participant. The objective assessment process may identify concerns or issues that should be addressed prior to or concurrently with a work experience.

Work experience opportunities may be provided through the WIOA program, which will require the DVOP specialist to assist the participant with preparing documentation for program eligibility and scheduling necessary orientations and appointments. When referring participants to WIOA for work experience opportunities, service code 211 (Referral to WIOA) must be recorded. The case note should indicate how the DVOP specialist helped facilitate enrollment in the work experience opportunity.

LWDBs must establish local policies and procedures which streamline and encourage the referral of JVSG participants to WIOA work experience opportunities and other relevant services. LWDBs are encouraged to build policies and procedures which emphasize the referral of VR&E (Chapter 31) veterans to work experience opportunities.

**Note:** Veterans referred to WIOA-funded workforce experience opportunities and other relevant services, who are determined eligible, receive priority of service in accordance with [Administrative Policy 111: Priority of Service for Veterans and Eligible Spouses](#) and [Administrative Policy 105: Priority of Service \(WIOA\)](#).

The enrollment of a JVSG participant in a work experience opportunity with the assistance of a DVOP specialist must be recorded using service code V07 (JVSG - Work Experience) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

## **8. Workforce Preparation Activities**

DVOP specialists may provide participants workforce preparation activities to increase a participant's employability and help prepare them for the workforce. Workforce preparation activities refer to skills and competencies that are not only useful in the workplace but are fundamental life skills. These preparations may be in the form of activities, programs, and/or services designed to help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills including competencies in:

- a. Adjusting to civilian work environment;
- b. Critical thinking;
- c. Digital skills;
- d. Skills necessary for successful transition into and completion of post-secondary education, training, or civilian employment;

- e. Utilizing resources; and
- f. Working with others.

The provision of workforce preparation activities must be recorded by service code V08 (JVSG - Workforce Preparation Activities) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

## **9. Consistent Contact**

Regular, consistent contact between the DVOP specialist and the participant, including meetings and updates, both pre-and post-employment, is the foundation of quality case management. Consistent contact is based on the participant's individual needs and situation per the written plan and case notes. Consistent contact may be conducted remotely or in-person; however, no pre-employment contacts should be made without reference to the IEP's goal and objectives. The purpose of pre-employment consistent contact is to ensure all parties are accountable for achieving the objectives and goal of the jointly developed IEP.

When the participant successfully obtains employment, the DVOP specialist must provide post-employment consistent contact for 90 days to ensure sustained employment. Post-employment consistent contact must be performed on a biweekly basis the first month following employment and on a monthly basis thereafter.

Successful consistent contact must involve direct contact with the participant; contact attempts which are not successful do not constitute a successful consistent contact service activity. Direct contact is considered to have occurred when the DVOP specialist and the participant have exchanged information, or the participant has agreed to the service being provided. Contact attempts should be made through various means (i.e., phone, email), and conducted at different times of the day. DVOP specialists who are unable to contact a participant after 90 days must close and exit the case in accordance with [Administrative Policy 115: Common Exit](#).

Successful consistent contact must be recorded by service code V09 (JVSG – Consistent Contact)<sup>7</sup> and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

Unsuccessful consistent contact attempts must be recorded by service code V09 (JVSG – Consistent Contact) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide. Unsuccessful contact attempts must be recorded using Employ Florida Completion Code: Unsuccessful Completion – Failed to Report.

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<sup>7</sup> Service code V09 (JVSG – Consistent Contact) is contingent on an IEP being present in the current program application and does not extend nor trigger participation.

## 10. Disabled Veterans Outreach Program Specialist Outreach Engagement

As part of their primary duties, DVOP specialists conduct outreach activities in the local area to build capacity with community resources, engage with current participants, and actively recruit eligible veterans to increase their case load. When conducting outreach activities, DVOP specialists may provide immediate services to individuals determined eligible in accordance with [Administrative Policy 102: Veteran Intake at Career Centers](#). Additionally, DVOP specialists may need to conduct outreach<sup>8</sup> to actively case manage participants and provide necessary in-person services.

When a DVOP specialist provides a service to a JVSG participant during outreach, or an individual presents at the career center and is enrolled in JVSG as a result of outreach activities, the DVOP specialist must document this by recording service code V10 (JVSG - DVOP Outreach Engagement) and including a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide. This service code must only be used for the following scenarios:

- a. When a DVOP specialist provides a service to a current participant during outreach.
- b. When a DVOP specialist provides a service to a new participant during outreach.
- c. When a new participant is enrolled in the JVSG program as a result of a DVOP specialist's outreach efforts.<sup>9</sup>

**Note:** The service code V10 (JVSG - DVOP Outreach Engagement) is to be utilized in conjunction with service code E49 (Organizational Visit VET/MSFW). The E49 (Organizational Visit VET/MSFW) code captures the outreach location visit and the V10 (JVSG - DVOP Outreach Engagement) code captures the individual who was served during, or as a result of, the outreach activities. LWDBs are encouraged to monitor and analyze the relationship between the V10 (JVSG - DVOP Outreach Engagement) and the E49 (Organizational Visit VET/MSFW) codes to determine the effectiveness of DVOP specialist outreach activities.

## 11. Work Readiness Case Conference

In a team approach, a DVOP specialist will provide the individualized career services needed to prepare the participant to be deemed work ready to be referred to a LVER for job development and advocacy services. These activities conducted

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<sup>8</sup> DVOP specialists must not conduct outreach to a participant's private residence. Outreach for the purpose of providing services to a participant who is already enrolled in JVSG should occur in a safe and public setting (e.g., college campus, homeless shelter, community partner's facility).

<sup>9</sup> Service code V10 must only be entered once for individuals presenting at the career center and enrolling in JVSG as a result of a DVOP specialist's outreach efforts. Subsequent V10 service codes for that individual must only be entered for services provided during outreach.

by the LVER provide individualized advocacy and additional opportunities to veterans and eligible persons that effectively facilitate the participant's employment.

The LVER must meet directly with the veteran or eligible person, in person or remotely, to verify work ready status and determine an effective outreach strategy to market the participant to appropriate employment opportunities. This meeting is facilitated by the DVOP specialist through an organized and scheduled case conference. It is recommended the DVOP specialist advise the participant of the role of the LVER as early in the case management process as possible. The effective explanation of the LVER's role demonstrates the program's value to the participant and should further encourage the participant to remain engaged throughout the case management process.

Prior to scheduling the work readiness case conference, the DVOP specialist must ensure the participant's work ready status by ensuring, at minimum, the participant has:

- a. An occupational goal with a favorable market outlook as determined using Employ Florida Labor Market Information (LMI);
- b. The knowledge, skills, aptitudes, and abilities required for the occupational goal;
- c. No barriers that prevent obtaining and retaining employment<sup>10</sup>;
- d. An appropriate, targeted, and current resumé;
- e. Suitable interview attire;
- f. Reliable transportation<sup>11</sup>; and
- g. Demonstrated proper interviewing skills.

Additionally, prior to the referral, the DVOP specialist must provide the LVER information regarding the participant's:

- i. Justice-involvement issues (if applicable);
- ii. Occupational interests;
- iii. Physical limitations; and
- iv. Salary expectations.

The coordination of a work readiness case conference must be recorded by service code V11 (JVSG – Work Readiness Case Conference) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

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<sup>10</sup> The veteran may be deemed work ready regardless of unresolved barriers to employment, so long as the remaining barriers will not hinder or prevent the obtaining or retaining of employment.

<sup>11</sup> Veterans who do not have access to reliable, private transportation may be referred to the LVER; however, the LVER must tailor the outreach strategy to those employers accessible through public transportation and within walking/biking distance of the participant's residence.



## 12. Job Referrals

DVOP specialists may provide work-ready participants referrals to employment openings in accordance with [Administrative Policy 96: Job Seeker Registration, Application and Services](#). Job referrals must be recorded in Employ Florida by following the instructions available in the [Virtual OneStop® User Guide for Staff, Section 19: Manage Labor Exchange](#). Referrals recorded in Employ Florida in accordance with this policy will automatically generate the relevant service code and the DVOP specialist must include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide. DVOP specialists should inform LVER staff of referrals made to allow for veteran advocacy efforts.

## 13. Staff-Assisted Job Search Activities

DVOP specialists may provide staff-assisted job search activities for work ready participants. Staff assisted job search activities must include significant staff involvement designed to help the participant plan and carry out a successful job-search strategy. These activities include resume preparation assistance, job search workshops, job finding clubs, development of a job-search strategy, and conducting a job search on behalf of the participant. Conducting a job search through Employ Florida on behalf of the participant without the participant's knowledge, does not constitute a staff-assisted job search activity.

The provision of staff-assisted job search activities must be recorded by service code 114 (Staff-Assisted Job Search) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

## C. Local Veterans' Employment Representative

LVER staff conduct employer outreach activities as part of the LWDB's business services unit that support veteran individual job developments and the referral of veterans to appropriate job openings. To serve veterans and eligible persons effectively and efficiently, LVER staff must focus on their primary role, which is employer outreach on behalf of veterans. In executing this role, LVER staff must concentrate efforts on advocacy services for veterans jointly determined to be work ready after receipt of individualized career services from a DVOP specialist. These activities must include efforts to increase job opportunities for veterans and eligible persons through direct employer contact<sup>12</sup>.

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<sup>12</sup> Direct employer contact may be conducted in-person, over the phone, or through other remote means. Direct contact requires an acknowledgement from the employer regarding the specific service provided.



## **D. Advocacy, Job Development Activities, and Employ Florida Reporting**

LVER staff must document advocacy efforts in the employer's service record and/or the participant's Employ Florida Wagner-Peyser program application, in accordance with this policy, by recording the service code which corresponds to the service provided, as follows:

<b>Service Code</b>	<b>Service Code Description</b>	<b>Employer or Participant Code</b>
123	Job Development Contact	Participant
E33	Job Development	Employer
500	Referred to Job Over 150 Days	Participant
V12	JVSG - Veteran Advocacy Contact	Participant
E53	Veteran Advocacy	Employer

### **1. Job Developments**

[20 Code of Federal Regulations \(CFR\) § 651.10](#) defines a job development as the process of securing a job interview with a public or private employer for a specific participant for whom the career center has no suitable opening on file. Prior to conducting job development activities on behalf of a participant, LVER staff must conduct a full review of Employ Florida to ensure there is no suitable employment opening on file<sup>13</sup>.

The process of securing a job interview on behalf of a veteran or eligible person must occur through direct contact with the employer. Job developments must center on each veteran's needs, skills, abilities, goals, physical abilities, and limitations determined through the work readiness case conference, as described in [Section IV.B.11](#) of this policy.

LVER staff must document job developments made on behalf of work ready JVSG participants by:

- a. Recording service code 123 (Job Development Contact) in the participant's Employ Florida Wagner-Peyser Program Application and attaching a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide; and
- b. Recording employer service code E33 (Job Development) in the employer's service plan. A case note is not required if the case note was entered appropriately on the corresponding 123 (Job Development Contact) service code.

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<sup>13</sup> If a suitable employment opening is available in Employ Florida, the LVER should coordinate with Wagner-Peyser staff or the DVOP specialist to facilitate a direct referral. LVER staff may contact the employer to advocate on behalf of the veteran in accordance with this policy.

**Note:** The 123 (Job Development Contact) and E33 (Job Development) are complementary service codes that are required for documenting job development contact attempts in most cases. There must be a corresponding number between both services for LVER staff when a business is registered in Employ Florida.

**i. Job Development Job Orders**

Successful job development activities which result in a job order must be recorded in Employ Florida in accordance with [Administrative Policy 99: Job Orders and Placements](#) and relevant local policies and procedures.

**ii. Referral to Job Development Job Orders**

LVER staff may make direct referrals of veterans and eligible persons to job development job orders in accordance with [Administrative Policy 96: Job Seeker Registration, Application and Services](#). Job referrals must be recorded in Employ Florida by following the instructions available in the [Virtual OneStop® User Guide for Staff, Section 19: Manage Labor Exchange](#). Referrals recorded in Employ Florida in accordance with this policy will automatically generate the respective service code. LVER staff must not make referrals to job orders that were not created through their job development activities.

**2. Veteran Advocacy Contact**

LVER staff must advocate on behalf of all veterans, with an emphasis on individualized advocacy on behalf of veterans and eligible persons who have been deemed work ready after receipt of individualized career services from a DVOP specialist. LVER staff conduct veteran advocacy contacts by making direct contact with employers and attempting to secure an interview for a specific veteran for an employment opening that is on file in the Employ Florida online labor exchange system.

LVER staff must document veteran advocacy contact attempts made on behalf of work ready veterans and eligible persons by:

- a. Recording service code V12 (Veteran Advocacy Contact) in the participant's Employ Florida program application and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.
- b. Recording employer service code E53 (Veteran Advocacy) in the employer's service plan. A case note is not required if the case note was entered appropriately on the corresponding V12 (Veteran Advocacy Contact) service code.

**Note:** The V12 (Veteran Advocacy Contact) and E53 (Veteran Advocacy) are complementary service codes that are required for documenting individual advocacy attempts. There should be a corresponding number between both services for LVER staff.

### **3. Career Center Staff**

Career center staff must be prepared to serve veterans and eligible persons when a DVOP specialist is unavailable. At minimum, the LWDB must ensure that the veteran or eligible person is provided with the services requested by the appropriate staff member. Additionally, career center staff must refer the eligible person to the DVOP specialist within two (2) business days so that they may provide a follow-up contact to determine if any additional services are desired. The DVOP specialist whom receives the referral must attempt to contact the eligible veteran or person within two (2) business days of receipt of the referral. Career center staff are not required to case manage veterans and eligible persons, unless mandated by local policy or program-specific requirements.

Referral by a career center staff member to a DVOP specialist for follow-up must be recorded using service code 168 (Referral for DVOP Follow-Up) and include a case note that aligns with the requirements prescribed in the Employ Florida Service Code Guide.

## **V. STATE AND LOCAL MONITORING**

Services and activities provided under JVSG must be monitored annually for compliance with JVSG requirements by DEO. DEO will monitor the requirements outlined in this policy inclusive of required local operating procedures. Additionally, LWDBs must establish local monitoring policies and procedures that include, at minimum:

1. Roles of the JVSG participant and LWDB staff;
2. Coordination of DVOP specialist and LVER staff; and
3. Local monitoring procedures for implementation of this policy.

## **VI. DEFINITIONS**

**Caregiver** - As defined by [Title 38, U.S.C. 1720G\(d\)](#), with respect to an eligible veteran, a caregiver means an individual who provides personal care services to support the veteran's:

- a. Health and well-being;
- b. Everyday personal needs (like feeding, bathing, and dressing); and/or
- c. Safety, protection, or instruction in their daily living environment.

**Career Center** - Also known as a one-stop center or American Job Center (AJC), career centers are designed to provide a full range of assistance to job seekers under one roof. Established under the Workforce Investment Act and reauthorized in the Workforce Innovation and Opportunity Act of 2014, these centers offer training referrals, career counseling, job listings, and similar employment-related services.

**Case Notes** - Online statements entered in the State MIS, Employ Florida, by the staff member that identifies a participant's status for a specific data element, the date on which the information was obtained, and the career planner who obtained the information.

**Consolidated Position (CP)** - Staff who performs the functions and duties of both a LVER and DVOP specialist in select LWDBs as assigned by the State Veterans' Program Office.

**Disabled Veterans Outreach Program (DVOP) Specialist** - Specialists who provide individualized career services and facilitate placements to meet the employment needs of veterans and eligible persons who have significant barriers to employment or have otherwise been designated by the U.S. Department of Labor (DOL) Veterans' Employment and Training Service (VETS).

**Eligible Person** - A veteran, spouse, or caregiver who is eligible to receive services from a DVOP specialist as described in Administrative Policy 102: Veteran Intake at Career Centers.

**Individualized Career Services** - Services required to retain or obtain employment, consistent with [20 CFR 678.430](#). Generally, these services involve significant staff time and customization to the veteran's needs. Individualized career services include services such as: specialized assessments, developing an individual employment plan, counseling, work experiences (including transitional jobs), etc.

**Job Finding Clubs** - An organized activity that provides instructions on resume writing, application preparation, interviewing skills, and/or job lead development and includes a period of structured application where participants attempt to obtain jobs.

**Job Referral** - A staff-assisted job referral is the act of LWDB staff facilitating the match between qualified jobseekers and employers with job openings; and the recording of such referral in Employ Florida.

**Job Search Planning** - Development of a plan (not necessarily a written plan) that includes the necessary steps and timetables to achieve employment in specific occupational, industry, and/or geographic area.

**Job Search Workshop** - An organized activity that provides instructions on resume writing, application preparation, interviewing skills, and/or job lead development.

**Justice Involved** - Having had interactions with the criminal justice system as a defendant.

**Local Veterans' Employment Representative (LVER)** - A representative funded by the JVSG who:

- a. Conducts outreach to employers in the area to assist veterans in gaining employment, including conducting seminars for employers and, in conjunction with employers, conducting job search workshops and establishing job search groups;
- b. Ensures priority of service is administered within the career center in accordance with federal and state requirements; and
- c. Facilitates employment, training, and placement services furnished to veterans in a State under the applicable State employment service delivery systems.

**Participant** - An individual who is determined eligible to participate in the program and receives a service funded by the program in either a physical location (CareerSource Florida Network Career Center or affiliate site) or remotely through electronic technologies.

**Priority of Service** - With respect to any qualified job training program, a covered person shall be given priority over nonveterans for the receipt of employment, training, and placement services provided under that program, notwithstanding any other provision of law. In order to be eligible for priority of service, a veteran must have served at least one day in the active military, naval, or air service, and have been discharged or released under conditions other than dishonorable, as specified in [Title 38, U.S.C. Section 101](#).

**Resume Assistance** - The act of providing a participant instruction on resume content, format, and cover letters along with providing assistance in the development and creation of the same.

**Suitable Employment** - Employment that offers wages comparable to the participant's recent employment and duties that correspond to his/her education level and previous work experience. Further, suitable employment should be within a reasonable commuting distance from the participant's place of residence, based upon the participant's commuting capabilities (i.e., personal vehicle, bus, walking).

**Transitioning Service Member** - A member of the U. S. military who will separate from active service in the next 12 months, or, who will retire from active service in the next 24 months.

**VII. REVISION HISTORY**

Date	Description
9/27/2021	Revised and issued by the Florida Department of Economic Opportunity to incorporate additional elements to improve operational and monitoring capabilities.

This policy rescinds DEO Memorandum Disabled Veterans Outreach Program (DVOP) Specialist and Individualized Career Services (ICS) Codes, issued April 1, 2019.

**VIII. RESOURCES**

[Employ Florida Service Code Guide](#)

[Employ Florida VETS](#)

[Jobs for Veterans State Grants \(JVSG\) Primer](#)

[Veterans' Program Letters Directory](#)



## Administrative Policy

**POLICY  
NUMBER  
119**

<b>Title:</b>	Consolidated Position Operational Requirements
<b>Program:</b>	Jobs for Veterans' State Grant
<b>Effective:</b>	November 10, 2021

### I. PURPOSE AND SCOPE

The purpose of this policy is to provide Local Workforce Development Boards (LWDBs) guidance for Consolidated Position (CP) staff supported by the Jobs for Veterans' State Grant (JVSG).

### II. BACKGROUND

The JVSG is a federally-funded, formula-based staffing grant that supports the hiring of Disabled Veteran Outreach Program (DVOP) specialists and Local Veteran Employment Representatives (LVERs) to provide individualized career and training-related services to veterans and eligible persons with Significant Barriers to Employment (SBE) and to assist employers in filling their workforce needs with job-seeking veterans and eligible spouses, respectively. The principle duties of the LVER are outlined in Title 38, United States Code (U.S.C.) Section 4104 and the principle duties of the DVOP specialist are outlined in Title 38, U.S.C., Section 4102A. Section 241(c) of the VOW (Veterans Opportunity to Work) to Hire Heroes Act of 2011 allows for states to assign CP staff to carry out the principle duties of both the LVER and DVOP, as approved by the U.S. Department of Labor Veterans Employment and Training Services (USDOL VETS).

### III. AUTHORITY

[38 United States Code \(U.S.C.\), Chapter 41](#)

[VOW to Hire Heroes Act of 2011](#)

[Veterans Program Letter \(VPL\) 01-20](#)

[VPL 03-14](#)

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

JVSG-funded staff are fully integrated into the career center to form a comprehensive team that provides services to veterans that address their employment and training needs. LWDBs are assigned JVSG-funded staff by the Department of Economic Opportunity (DEO) according to veteran population and the needs of the community. JVSG-funded staff are state merit staff, jointly managed by DEO and the LWDBs in accordance with current grantee-subgrantee agreements. As such, LWDBs are responsible for ensuring CPs assigned to their area operate in accordance with this policy. acronyms

##### **A. Consolidated Position Assignment**

The State Veterans Program Coordinator designates CP staff to select areas of the state in accordance with [Administrative Policy 112 Jobs for Veterans' State Grant Staffing Requirements](#). The assignment of CPs is determined through consultation with the respective LWDB and the USDOL VETS State Director of Veterans Employment and Training. DEO will assign CPs to LWDBs when it is established that the assignment of a CP will:

- a) Promote a more efficient administration of services to veterans, with an emphasis on services to disabled veterans;
- b) Ensure no hinderance to the provision of services to veterans and employers; and
- c) Maximize the effectiveness of the JVSG program within the career center and local area.

##### **B. Principle Duties**

Staff designated as CPs must consistently perform the duties of both the DVOP specialist and LVER. LWDBs must ensure that CPs primarily perform the duties, tasks, and functions of the LVER and DVOP as established in Title 38, U.S.C., and outlined in federal and state guidance. LWDBs must ensure that, at a minimum, the CP is:

- a) Performing the role of a DVOP specialist on a bi-weekly (every two weeks) basis, as evidenced by:
  - i. The provision of individualized career services to veterans and eligible persons;
  - ii. Outreach to community partners and organizations to establish and/or maintain a network of veteran resources; and/or
  - iii. Outreach to locations where veterans congregate in order to promote the career center and build his/her caseload.



- b) Performing the role of a LVER on a bi-weekly basis (every two weeks), as evidenced by:
  - i. Outreach to employers to promote the hiring of veterans, to include the provision of job development contacts for veterans who are deemed work ready after receipt of services from a DVOP specialist.
  - ii. The provision of training for career center staff on subjects pertaining to veterans (e.g., priority of service for veterans, career center veteran intake, and the JVSG program).
  - iii. Capacity building within the career center to apprise staff of veteran services and program initiatives.

### **C. Recording Services and Activities**

To validate that CP staff are consistently performing the duties of both a DVOP specialist and LVER, LWDBs must ensure CP staff are recording services and activities from these respective roles in the state's online labor exchange and case management system, Employ Florida. LWDBs must ensure CP staff record services and activities in accordance with all active Administrative Policies and the Employ Florida Service Code Guide.

To ensure services are reported accurately, CP staff must be assigned a distinct user-role for Employ Florida that will allow for privileges to serve both employers and veterans/eligible persons. LWDBs must ensure Employ Florida user accounts created on behalf of CP staff are in alignment with this policy. LWDBs may direct questions regarding the assignment of Employ Florida user roles to the DEO Performance Reporting Unit at [PRA@deo.myflorida.com](mailto:PRA@deo.myflorida.com).

### **D. National Veterans' Training Institute Mandatory Training**

CP staff must attend both the LVER and DVOP mandated trainings offered by the National Veterans' Training Institute (NVTI) located in Dallas, Texas and administered by Management Concepts, Inc. These trainings must be completed within 18 months of the position start date. All costs for training, to include travel and lodging, are provided for by the JVSG. The SVPC will coordinate with individual LWDBs and JVSG staff to schedule NVTI training.

### **E. Monitoring**

LWDBs must review and modify local operating procedures, as necessary, to ensure they are operating in accordance with this guidance. Local JVSG programs must be monitored annually for compliance with state and federal requirements by DEO. DEO will monitor the requirements outlined in this policy and local operating procedures.

## V. DEFINITIONS

**Consolidated Position** - Staff who performs the functions and duties of both a LVER and DVOP specialist in select LWDBs as assigned by the State Veterans' Program Office.

**Disabled Veteran** - A veteran who is entitled to compensation (or who but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary, or a person who was discharged or released from active duty because of a service-connected disability.

**Disabled Veteran Outreach Program Specialist** - Specialists who provide individualized career services and facilitate placements to meet the employment needs of veterans and eligible persons who have significant barriers to employment or have otherwise been designated by USDOL VETS.

**Individualized Career Services** - Services required to retain or obtain employment, consistent with [20 CFR 678.430](#). Generally, these services involve significant staff time and customization to the veteran's needs. Individualized career services include services such as: specialized assessments, developing an individual employment plan, counseling, work experiences (including transitional jobs), etc.

**Local Veterans' Employment Representative** - A representative funded by the JVSG who:

- a. Conducts outreach to employers in the area to assist veterans in gaining employment, including conducting seminars for employers and, in conjunction with employers, conducting job search workshops and establishing job search groups;
- b. Ensures priority of service is administered within the career center in accordance with federal and state requirements; and
- c. Facilitates employment, training, and placement services furnished to veterans in a State under the applicable State employment service delivery systems.

**Eligible Spouse** - Spouse of any of the following:

- a) Any veteran who died of a service-connected disability;
- b) Any member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
  - i. Missing in action;
  - ii. Captured in line of duty by a hostile force; or
  - iii. Forcibly detained or interned in line of duty by a foreign government or power;
- c) Any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or

- d) Any veteran who died while a total, service-connected disability was in existence.

**Eligible Veteran** - A person who:

- a) Served on active duty for a period of more than 180 days and was discharged or released therefrom with other than a dishonorable discharge;
- b) Was discharged or released from active duty because of a service-connected disability;
- c) As a member of a reserve component under an order to active duty pursuant to section 12301(a), (d), or (g), 12302, or 12304 of title 10, served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge; or
- d) Was discharged or released from active duty by reason of a sole survivorship discharge (as that term is defined in [Title 10, 1174\(i\)](#)).



2023.10.12.A.1

## Strategic Policy

<b>Title:</b>	<b>Statewide Standardization of Tools and Services</b>
<b>Adopted:</b>	10/12/2023
<b>Effective:</b>	10/12/2023

### I. PURPOSE AND SCOPE

The Governor, the CareerSource Florida Board of Directors and the Florida Department of Commerce (FloridaCommerce) are committed to the appropriate and necessary use of federal and state workforce development funds. As described in Chapter 445.003, Florida Statutes, the state's approach to implementing the Workforce Innovation and Opportunity Act (WIOA) has six elements:

- Streamlining Florida's employment and training programs;
- Empowering individuals to make informed decisions in choosing the qualified training program(s) that best meets their needs;
- Providing universal access through a one-stop delivery system for employment services;
- Increasing performance accountability;
- Improving local workforce development board and private sector leadership focused on strategic planning, policy development, and oversight of the local workforce development system; and
- Ensuring localities have exceptional flexibility and integration to build on existing reforms and transformational changes that enhance the Florida workforce system, eliminate barriers to employment and improve opportunities for Florida businesses and job seekers.

Local workforce development boards and local workforce development areas are expected to work with state and local partners to develop plans, strategies and policies implementing these six elements into their operations.

In 2013, the state board adopted a unified brand identity for the state workforce system. Standardization of tools and resources across the CareerSource Florida network ensures the unified brand identity includes a cohesive and consistent customer and staff experience throughout the state.

The benefits of creating a uniform experience for job seekers and businesses include but are not limited to:

- Ease of expansion of partnership relationships with partner agencies, community-based organizations, businesses and other partners that work across multiple local workforce development areas.
- Structured and predictable delivery models that allow targeted performance analysis, troubleshooting and diagnosis, and implementation of continuous improvement models.
- Improved consistency in performance and compliance monitoring.

This policy applies to CareerSource Florida, FloridaCommerce, and all local workforce development boards, local workforce development areas, and regional planning areas.

## **II. BACKGROUND**

Public Law 113-128, the Workforce Innovation and Opportunity Act (WIOA), is designed to help job seekers access employment, education, training and support services to succeed in the labor market 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 [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 to include, but not be limited to, technology, administration, fiscal considerations, 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. Revisions to the REACH Act included in Senate Bill 240 (2023) require the state board to implement consistent procurement policies and procedures and leverage buying power to achieve cost savings.

The Policies and Procedures of this strategic policy align with the goals of WIOA, Code of Federal Regulations, Chapter 445, Florida Statutes, and the REACH Act to ensure efforts by the state workforce board to achieve efficiencies and consistencies throughout the state are effective.

### III. POLICY AND PROCEDURES

As described in Chapter 445.007(9), Florida Statutes, for purposes of procurement, local workforce development boards and their administrative entities shall apply the procurement and expenditure procedures required by federal law, the policies of FloridaCommerce and the state workforce development board for the expenditure of federal, state, and non-pass-through funds.

Procurement of all technology, tools and services for local, regional and network-wide use shall at a minimum ensure:

- Standardization of service delivery to create a uniform customer experience.
- Realize efficiencies through maximizing the expenditure of funds, use of human and other resources and time directed to training and business services.
- Improve performance, accountability and transparency throughout the workforce development system.

**To support partnership, encourage predictability, and ensure attainment of shared performance goals, state procured technology, tools and services shall be used by all local workforce development boards and local workforce development areas as well as regional planning areas.**

Local workforce development boards, local workforce development areas and regional planning areas are prohibited from using state-appropriated or allocated funds for purchasing tools, services, or resources that are duplicative to state procured items without making a specific request to the CareerSource Florida Board of Directors. If recommended by FloridaCommerce and granted by the state board, the requestor may acquire the specified tools, products or services as approved.

When procuring tools and resources for state use, CareerSource Florida and FloridaCommerce may consider:

- System-wide standardization and need;
- Modernization of delivery;
- Cost, value and return on investment;
- Available data;
- Industry testimonials supporting acquisition;
- Negotiation of contracts;
- Individual local area needs; and
- Input from local workforce development boards, local workforce development regions and stakeholders where appropriate.

Tools and services not made available at the state level that are acquired by local workforce development boards, local workforce development areas and regional planning areas may be subject to a review by the state board or FloridaCommerce.

Local policies and procedures identifying how this statewide strategy is implemented shall be described in each local workforce development board's four-year and two-year

workforce development plans and reflected in the local workforce development board operating policies.

#### IV. AUTHORITY

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

[Chapter 2021 – 161, Laws of Florida, the Reimagining Education and Career Help Act](#)

[Chapter 445, Florida Statutes](#)

#### V. HISTORY

Date	Description
TBD	Policy approved by CareerSource Florida Board of Directors
02/23/2023	CareerSource Florida Board of Directors approves Florida Workforce System Transformation Plan.



2023.06.07.A.5

## Strategic Policy

<b>Title:</b>	<b>Career Ladder Identifier and Financial Forecaster (CLIFF) Strategy</b>
<b>Adopted:</b>	06/07/2023
<b>Effective:</b>	06/07/2023

### I. PURPOSE AND SCOPE

The CareerSource Florida Board of Directors designs, implements and invests in strategies that foster collaboration and cooperation among workforce, education and industry partners to help Floridians succeed in the workforce. Moreover, a knowledgeable and skilled workforce is essential for attracting economic development opportunities that align with Florida growth strategies. The board's efforts to enhance employment, education and training that advances economic growth, upward mobility and diversification of Florida's economy. These strategies help Floridians and businesses to strengthen and develop the state's overall business climate.

Under the Workforce Innovation and Opportunity Act (WIOA), partner programs and entities responsible for workforce and economic development, educational and other human resource programs collaborate to establish a career center network that integrates service delivery across all programs. This integrated system enhances job seekers' access to quality skills and employment and creates a pipeline of talent for employers to find and hire qualified candidates.

For Floridians receiving public assistance, taking a job with higher wages may result in reduced benefits for their family. As CareerSource Florida's mission includes helping Floridians achieve self-sufficiency through education, training and the provision of wraparound services, it is imperative that career counselors guide job seekers by supporting and sustaining their efforts to understand and address the short-term hurdles caused by changes to benefits through a structured, systematic action plan that will promote steady client engagement and growth toward longer-term economic prosperity.

Local WIOA plans, aligned with Florida's WIOA state plan, clarify how local workforce development boards implement strategies that help Floridians secure good jobs, while



providing employers with the skilled workers they need to compete in the global economy. Local workforce development boards shall align local strategies and policies to help customers achieve self-sufficiency under WIOA, Florida law and the state's workforce development plan.

## **II. BACKGROUND**

Public Law 113 – 128, the Workforce Innovation and Opportunity Act, requires each 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. The strategic policy of Florida's state workforce development board provides direction to ensure that publicly funded workforce development programs are administered consistent with the state plan and compliant with WIOA.

In accordance with this federal requirement, Florida's WIOA state plan outlines strategic guidance on delivering services under WIOA and the Wagner-Peyser Act as described in Training and Employment Guidance Letter No. 19-16. The guidance includes developing strategies to create a seamless, customer-focused career center network that integrates service delivery across all programs to make it easier for workers, including those with barriers to employment, to access the services they need to obtain skills and employment.

Pursuant to CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education and Training Strategy, local workforce development boards shall leverage all allowable tools and resources in their authority to assist Floridians in securing employment that leads to economic self-sufficiency and reduces the need for public assistance. That policy also aligns with the Reimagining Education and Career Help (REACH) Act, which establishes a blueprint for Florida's talent ecosystem to ensure the state has the talent it needs to remain competitive in the global economy. This includes developing strategies to help career center customers and job seekers understand their potential earnings from paid employment while mapping the timing and size of reductions in public assistance as they progress toward self-sufficiency.

Consistent with the objectives and guidance above, CareerSource Florida and the Federal Reserve Bank of Atlanta developed the Florida Career Ladder Identifier and Financial Forecaster (CLIFF) Dashboard. This information tool allows one-stop center staff to assist Floridians in visualizing how returning to work or upskilling to a higher-paying occupation could impact their future earnings and public benefits as their household progresses along the path to self-sufficiency.

## **III. POLICIES AND PROCEDURES**

### **POLICY**

Workforce-related programs must be responsive to business and industry needs by providing recruitment, hiring and training to satisfy Florida employers' current and future talent needs. Strategies should align with state board strategic and administrative guidance, local labor

market data and industry sector and local business needs. A collaborative approach including industry, education and workforce partners should ensure the efficient use of resources.

Consistent with WIOA and Florida's WIOA state plan, it is the policy of the CareerSource Florida Board of Directors that the Florida CLIFF Dashboard and associated suite of CLIFF tools shall be leveraged by local workforce development board leadership, career center staff and made available to extended partners and stakeholders to prioritize employment, emphasize education and training, reduce welfare dependency, increase economic self-sufficiency, and meet employer needs.

## **IMPLEMENTATION**

### **Case Management**

The Florida CLIFF Tool Suite offers a graduated series of informational resources for use with customers in a case management setting based on where they are currently along a notional 'crisis-stability continuum':

- CLIFF Snapshot is for those needing immediate assistance in stabilizing their financial situation.
- CLIFF Dashboard focuses on mitigating benefits cliffs for individuals on public assistance as they earn more money and proceed along their path to self-sufficiency.
- CLIFF Financial Planner allows for a more detailed examination of the mechanics of a household's finances.

### **Career Planning**

The Florida CLIFF Dashboard can help clients who have achieved basic financial stability better understand and visualize the timing, magnitude, and general effects of increased earnings from employment on their public assistance as they progress along in-demand career pathways toward self-sufficiency. Of particular value here are the area-specific wage data that allow customers to make informed decisions about which careers to consider and what the impacts of that decision might be.

### **Coordinated and Targeted Services**

Consistent with the REACH Act and [CareerSource Florida's Reimagining Florida's Workforce System: A Three Pillar Plan for Transformation](#), the Florida CLIFF Tool Suite offers practical, actionable information to assist families in identifying and overcoming benefit cliffs on the road to self-sufficiency. The CLIFF Tool Suite further identifies opportunities for strengthening collaboration and alignment among community partners to increase economic mobility, reduce public assistance dependency, and enhance access to education, training and employment.

Efforts should result in greater degrees of coordination, cross-partner efficiencies, inter-partner gap identification and removal, and stronger overall outcomes for the partners' shared customers through more intentional and collaborative case management.

Local workforce development boards shall identify appropriate points within programmatic processes to implement use of the Florida CLIFF Tool Suite to:

- Better understand specific gaps and barriers faced by each client.

- Identify specific wraparound support services needed and assist clients in obtaining needed services through partner referrals or leveraging existing resources at local workforce development boards.
- Heighten awareness among all stakeholders of information useful for shaping each partner's role in the strategic and tactical approach to a given client's situation.
- Prompt exploration—by both individual stakeholders and groups of partners—into opportunities to organize, sequence, and assess the overall set of activities performed by one or more partners in support of their shared customers, particularly around inter-partner resource planning and collaborative service provision.

Local workforce development boards shall develop strategies and policies that provide simplified and expanded access to employment, education and training services. Allowable tools and resources include but are not limited to those described in Training and Employment Guidance Letter Number 19-16, CareerSource Florida Policy 2021.12.09.A.1 — Comprehensive Employment Education and Training Strategy, and the CLIFF Tool Suite. Local strategies for programmatic implementation and usage tracking of the CLIFF Tool Suite shall be written and placed in each local workforce development board's four-year plan, reflected in the local workforce development board's operating policies and implementation shall be monitored by the Department of Economic Opportunity.

#### **IV. AUTHORITIES**

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

[Chapter 445.003 – 445.004, Florida Statutes](#)

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

[Training and Employment Guidance Letter No. 19-16](#)

[CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment Education and Training Strategy](#)

#### **V. ATTACHMENTS**

[State of Florida Workforce Innovation and Opportunity Act Unified Plan](#)

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

[Florida CLIFF Dashboard](#)

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

## **Action Item 1**

### **CONDITIONAL ACCEPTANCE OF CAREERSOURCE FLORIDA 2024-2025 ANNUAL AUDIT**

CareerSource Florida's independent audit firm, Cherry Bekaert, LLC., has substantially completed the annual financial audit of the accounting records and systems of CareerSource Florida for the fiscal year ending June 30, 2025. Enclosed in the agenda packet is a draft copy of the audit report.

In accordance with Policy Number 121 issued by the Florida Department of Commerce on Resolution of Recipient and Subrecipient Monitoring and Audit Findings, auditors will appear before the Board, or an appropriate committee of the Board, to explain the opinions expressed by the auditor and to discuss the significance of any audit findings, including any findings contained in the Management Letter.

Copies of the audit, management letter, and any corrective action plan must be submitted to the Florida Department of Commerce Inspector General, the State Auditor General's Office, the Department of Financial Services, and the Federal Audit Clearinghouse, as well as to the Governor, House, and Senate as part of the CareerSource Florida annual report required to be submitted by December 1 of each year.

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### **FOR CONSIDERATION**

- **Conditional acceptance of the annual financial audit for the fiscal year ending June 30, 2025, conducted and prepared by Cherry Bekaert, LLC.**

**CAREERSOURCE FLORIDA, INC.**

**FINANCIAL STATEMENTS AND  
SUPPLEMENTARY INFORMATION**

*As of and for the Year Ended June 30, 2025*

*And Report of Independent Auditor*

**CAREERSOURCE FLORIDA, INC.**  
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## Report of Independent Auditor

**PLACEHOLDER**

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**Report of Independent Auditor**

**PLACEHOLDER PAGE 2**

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**Report of Independent Auditor**

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# **CAREERSOURCE FLORIDA, INC.**

## **MANAGEMENT'S DISCUSSION AND ANALYSIS**

*JUNE 30, 2025 AND 2024*

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This discussion and analysis of CareerSource Florida, Inc.'s financial performance provides an overview of its financial activities for the fiscal year ended June 30, 2025. This analysis should be read in conjunction with the report of independent auditor (pages 1-3) and the basic financial statements, which begin on page 15.

### **Financial Highlights**

Assets of CareerSource Florida, Inc. exceeded its liabilities at the close of the most recent fiscal year by \$826,541 (net position of \$823,695, is unrestricted). Assets exceeded liabilities at the close of the prior fiscal year by \$880,006 (net position of \$860,736 is unrestricted).

Government assistance, including pass-through grants, accounted for \$19,692,140 and \$20,438,514 in revenue for the years ended June 30, 2025 and 2024, respectively.

For the years ended June 30, 2025 and 2024, CareerSource Florida, Inc. spent \$1,155,574 and \$1,399,637, respectively, for Incumbent Worker Training programs, \$6,629,870 and \$5,112,245 respectively, for Quick Response Training, and \$12,091,182 and \$14,015,063, respectively, in other program costs, which include general, administrative, and contractual expenses. For the year ended June 30, 2025, CareerSource Florida, Inc. incurred \$19,876,626 in total expenses for a total decrease of \$650,319 or 3.17% compared to prior year. For the year ended June 30, 2024, CareerSource Florida, Inc. incurred \$20,526,945 in total expenses for a total increase of \$3,959,019 or 23.91% from the prior year.

### **Overview of Financial Statements**

This discussion and analysis is intended to serve as an introduction to CareerSource Florida, Inc.'s basic financial statements. The basic financial statements are comprised of three components: 1) government-wide financial statements, 2) fund financial statements, and 3) notes to the financial statements.

### **Government-Wide Financial Statements**

The Government-wide Financial Statements are designed to provide readers with a broad overview of CareerSource Florida, Inc.'s finances, in a manner similar to a private-sector business. CareerSource Florida, Inc.'s government-wide financial statements include the statement of net position and the statement of activities.

The Statement of Net Position presents financial and capital resources of CareerSource Florida, Inc. Assets are reported when CareerSource Florida, Inc. acquires ownership over assets and liabilities are reported when they are incurred, regardless of the timing of the related cash flows. The difference between CareerSource Florida, Inc.'s total assets and total liabilities is net position. Over time, increases or decreases in net position may serve as a useful indicator of whether the financial position is improving or deteriorating.

The Statement of Activities presents revenue and expenses and shows how CareerSource Florida, Inc.'s net position changed during the most recent fiscal year. All changes in net position are reported in a manner similar to the approach used by a private-sector business in that revenues are recognized when earned or established criteria are satisfied and expenses are reported when incurred. Accordingly, revenues are reported even when they may not be collected for several months after the end of the accounting period and expenses are recorded even though they may not have used cash during the period.

### **Fund Financial Statements**

Fund financial statements consist of a balance sheet and a statement of revenues, expenditures, and changes in fund balances. These statements are prepared on an accounting basis that is significantly different from that used to prepare the government-wide financial statements.

**CAREERSOURCE FLORIDA, INC.**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**

*JUNE 30, 2025 AND 2024*

In general, these financial statements have a short-term emphasis and, for the most part, measure and account for the cash and other assets that can easily be converted to cash. For example, amounts reported on the balance sheet include items such as cash and receivables collectible within a short period of time, but do not include capital assets such as land and buildings. Fund liabilities include amounts that are to be paid within a short period after the end of the fiscal year. The difference between a fund's total assets and total liabilities is labeled as fund balance, and generally indicates the amount that can be used to finance the next fiscal year's activities.

**Notes to the Financial Statements**

The notes provide additional information that is essential to a full understanding of the data provided in the government-wide and fund financial statements. They can be found on pages 15-23 of this report.

In addition to the basic financial statements and accompanying notes, this report also presents a Schedule of Expenditures of Federal Awards and State Financial Assistance, which can be found on page 29. This schedule lists all Federal and State grants awarded to CareerSource Florida, Inc. and the related expenditures for the fiscal year ended June 30, 2025.

**Government-Wide Financial Analysis**

One of the most important questions asked about CareerSource Florida, Inc.'s finances is, "Is CareerSource Florida, Inc., as a whole, better off or worse off as a result of the year's activities"? The statement of net position and the statement of activities report information about CareerSource Florida, Inc.'s activities in a way that will help answer this question. These two statements report the net position of CareerSource Florida, Inc. and changes in them during the last reporting period. You may think of CareerSource Florida, Inc.'s net position – the difference between assets and liabilities - as one way to measure financial health or financial position. Over time, increases or decreases in CareerSource Florida, Inc.'s net position are one indicator of whether its financial health is improving or deteriorating. However, you will need to consider other non-financial factors such as changes in interest rates, economic conditions, regulations, and new or changed governmental legislation.

The following schedule is a summary of the fiscal year 2025 Statement of Net Position, which can be found on page 9 of this report with comparative information for the fiscal years 2024 and 2023.

**Condensed Financial Statements**  
**Statement of Net Position**

	<b>2025</b>	<b>2024</b>	<b>2023</b>
<b>ASSETS</b>			
Current and other assets	\$ 9,760,118	\$ 6,565,930	\$ 8,187,932
Capital and long-term assets	460,295	663,636	862,214
<b>Total Assets</b>	<b>\$ 10,220,413</b>	<b>\$ 7,229,566</b>	<b>\$ 9,050,146</b>
<b>LIABILITIES</b>			
Current Liabilities	8,599,438	5,377,783	6,961,767
Long-term liabilities	794,434	971,777	1,187,460
<b>Total Expenses</b>	<b>\$ 9,393,872</b>	<b>\$ 6,349,560</b>	<b>\$ 8,149,227</b>
<b>NET POSITION</b>			
Net investment in capital assets	2,846	19,270	59,029
Net position, beginning of year	823,695	860,736	841,890
<b>Total Net Position</b>	<b>\$ 826,541</b>	<b>\$ 880,006</b>	<b>\$ 900,919</b>

**CAREERSOURCE FLORIDA, INC.**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS**

*JUNE 30, 2025 AND 2024*

As noted earlier, changes in net position may serve over time as a useful indicator of an organization's financial position. For the year ended June 30, 2025, CareerSource Florida, Inc.'s net position is \$826,541, which is a decrease of \$53,465 in net position for the year. This decrease in net position represented a decrease of approximately 6.08% from the \$880,006 net position at June 30, 2024, and is the result of a decrease in capital assets due to depreciation and amortization in 2025, net of the decrease in unrestricted funds. For the year ended June 30, 2024, CareerSource Florida, Inc.'s net position is \$880,006, which is a decrease of \$20,913 in net position for the year. This decrease in net position represented a decrease of approximately 2.32% from the \$900,919 net position at June 30, 2023, and is the result of a decrease in capital assets due to depreciation and amortization in 2024, net of the decrease in unrestricted funds. The majority of CareerSource Florida, Inc.'s net position is unrestricted and can be used for operations and program related expenses.

The following chart is a summary of the information presented in the 2025 Statement of Activities found on page 10 of this report, with comparative information in 2024 and 2023.

**Careersource Florida, Inc.'s Statement of Activities**

	<b>2025</b>	<b>2024</b>	<b>2023</b>
Revenue:			
Operating grants and contributions	\$ 19,692,140	\$ 20,438,514	\$ 16,453,370
Other income	131,021	67,518	1,522
Total Revenue	19,823,161	20,506,032	16,454,892
Expenses:			
Program Services:			
Incumbent worker training	1,155,574	1,399,637	985,047
Quick response training	6,629,870	5,112,245	5,066,916
Other program costs	12,091,182	14,015,063	10,515,963
Total Expenses	19,876,626	20,526,945	16,567,926
Change in net position	(53,465)	(20,913)	(113,034)
Net position, beginning of year	1,205,252	1,226,165	1,226,165
Net position, end of year	\$ 1,151,787	\$ 1,205,252	\$ 1,113,131

Governmental activities decreased CareerSource Florida, Inc.'s net position by \$53,465, or by 6.08%, for the year ended June 30, 2025, and decreased CareerSource Florida, Inc.'s net position by \$20,913, or by 2.32%, for the year ended June 30, 2024. The following information related key points regarding the financial activities that significantly impacted the change in net assets:

- Operating grants and contributions revenue decreased by \$746,374, or 3.65, in 2025. This resulted from a decrease in the amount of requested reimbursements in the Incumbent Worker Training grant program in the year and reduced contract expenses related to the special projects, partially offset by an increase in the amount of requested reimbursements in the Quick Response Training grant program. Operating grants and contributions revenue increased by \$3,985,144, or 24.22%, in 2024. This resulted from an increase in the amount of requested reimbursements in the Incumbent Worker Training grant program in the year and additional contract expenses related to the REACH Act.

## CAREERSOURCE FLORIDA, INC. MANAGEMENT'S DISCUSSION AND ANALYSIS

JUNE 30, 2025 AND 2024

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- Incumbent Worker Training (IWT) grant reimbursements decreased by \$244,063, or 17.44%, in 2025, and increased by \$414,590, or 42.09%, in 2024. IWT expenses are incurred on a reimbursement-request basis and are subject to timing variances; thus, these changes are a result of timing variances pertaining to award issuance and subsequent reimbursement requested. For the year ended June 30, 2025, CareerSource Florida, Inc. received and processed fewer requested reimbursements than the previous year, and for the year ended June 30, 2024, CareerSource Florida, Inc. received and processed more requested reimbursements than the previous year.
- Quick Response Training ("QRT") grant assistance increased by \$1,517,625, or 29.69%, in 2025, and increased by \$45,329, or 0.89%, in 2024. QRT expenses are incurred on a reimbursement-request basis and are subject to timing variances; thus, these changes are a result of timing variances pertaining to award issuance and subsequent reimbursement requested. For the years ended June 30, 2025 and 2024, CareerSource Florida, Inc. received and processed more requested reimbursements than each of the previous years.
- Other Program Costs decreased by \$1,923,881, or 13.73%, in 2025. This decrease is mostly in program costs due to reduced special project contracts. Other Program Costs increased by \$3,499,100, or 33.27%, in 2024. This increase is mostly in program costs due to additional contract expenses related to the REACH Act.

### Fund Financial Analysis

As noted earlier, CareerSource Florida, Inc. also presents fund financial statements to provide information on near-term inflows, outflows, and balances of spendable resources. CareerSource Florida, Inc. has one governmental fund (the General Fund). The financial operations of the General Fund are included in the Statement of Revenues, Expenditures, and Changes in Fund Balance on page 14 of this report.

The following are significant highlights of the general fund financial statements:

- At June 30, 2025, total assets were \$9,760,118, of which cash accounted for 77.90% of the total balance. At June 30, 2024, total assets were \$6,565,930, of which cash accounted for 45.68% of the total balance.
- Cash increased a total of \$4,604,027 in 2025 for a balance of \$7,603,116 at June 30, 2025. This was the result of QRT program funds receipted during the year exceeding disbursements, and an increase in grant payables at year end. Cash decreased a total of \$2,025,378 in 2024 for a balance of \$2,999,089 at June 30, 2024. This was the result QRT program funds disbursed during the year exceeding receipts, and an advance of QRT program funds requested in June 2024 not being received until after year- end.
- Total general fund liabilities at June 30, 2025 were \$8,599,438, of which unearned revenues accounted for approximately 61.16% of the total. The increase in the unearned revenue balance resulted from QRT program receipts during the year exceeding disbursements. Total general fund liabilities at June 30, 2024 were \$5,377,783, of which unearned revenues accounted for approximately 58.56% of the total. The decrease in the unearned revenue balance resulted from QRT program funds disbursed during the year exceeding receipts, and an advance of QRT program funds requested in June 2024 not being received until after year-end.
- Total General Fund revenues were \$19,731,401 for the year ended June 30, 2025, a decrease of \$774,631 or 3.78%. This decrease was driven by a decrease in the amount of requested reimbursements in Incumbent Worker Training grant program in the year and reduced contract expenses related to the special projects, partially offset by an increase in the amount of requested reimbursements in the Quick Response Training grant program. Total General Fund revenues were \$20,506,032 for the year ended June 30, 2024, an increase of \$4,051,140 or 24.62%. This increase was driven by more dollars being requested for reimbursement by IWT grantees and reimbursements for additional contract expenses related to the REACH Act.

## **CAREERSOURCE FLORIDA, INC.**

### **MANAGEMENT'S DISCUSSION AND ANALYSIS**

*JUNE 30, 2025 AND 2024*

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- Total expenditures decreased by \$693,422 in 2025, or 3.38%. This was primarily the result of increased spending in QRT program. Total expenditures increased by \$4,061,592 in 2024, or 24.64%. This was primarily the result of increased spending of the IWT program and additional contract expenses related to the REACH Act.

#### **Capital Asset Administration**

CareerSource Florida, Inc.'s investment in capital assets amounts to \$2,845 for the year ended June 30, 2025 and \$19,270 for the year ended June 30, 2024 (net of accumulated depreciation and amortization), which includes the lease right-to-use assets and related lease liability. Additional information on CareerSource Florida, Inc.'s capital and lease right-to-use assets can be found in Notes 3 and 4 on pages 18-20 of this report.

#### **Economic Factors**

In accordance with the Workforce Innovation and Opportunity Act of 2014, CareerSource Florida, Inc. operates throughout the state as the primary workforce policy organization on behalf of the State of Florida. CareerSource Florida, Inc. accomplishes this by linking workforce and economic development strategies through business-driven initiatives and programs to ensure that Florida's Workforce has the skills that will meet current and future business needs. Florida businesses continue to cite workforce issues as their most important concern, according to surveys undertaken by various business associations. This concern is consistent with national studies highlighting the difficulties of finding and keeping qualified workers. Additionally, the growing prominence of the technology and biotechnology sectors increases the need to produce skilled workers.

Since Florida's economy is linked to both national and global economic markets which are impacted and driven by major changes and advancements in technology, the challenges facing CareerSource Florida, Inc. will never be completely accomplished and must be continuously adapted to meet these challenges from year to year. CareerSource Florida, Inc. also promotes an environment where Floridians have the opportunity to upgrade their education and skills to obtain jobs that lead to economic self-sufficiency.

Funding for CareerSource Florida, Inc., its initiatives and operations, is derived from legislative appropriations from revenues collected by the State of Florida and Federal workforce training funds. In addition to funds for general operational costs of the Board and direct staff, CareerSource Florida, Inc. receives funding for two customized training programs the Quick Response Training and Incumbent Worker Training programs.

#### **Request for Information**

This financial report is designed to provide a general overview of CareerSource Florida, Inc.'s finances. Questions concerning any of the information provided in this report or requests for additional information should be addressed to CareerSource Florida, Inc., PO Box 13179, Tallahassee, FL 32317.

**CAREERSOURCE FLORIDA, INC.**  
**STATEMENT OF NET POSITION**

*JUNE 30, 2025 AND 2024*

	<b>2025</b>	<b>2024</b>
<b>ASSETS</b>		
Current Assets:		
Cash	\$ 7,603,116	\$ 2,999,089
Grants and contracts receivable	2,048,382	3,469,638
Prepaid expenses	108,120	96,703
Total Current Assets	<u>9,759,618</u>	<u>6,565,430</u>
Noncurrent Assets:		
Capital assets, net	2,846	19,720
Lease right-to-use asset, net	457,449	643,916
Prepaid expenses	500	500
Total Noncurrent Assets	<u>460,795</u>	<u>664,136</u>
<b>Total Assets</b>	<u><u>\$ 10,220,413</u></u>	<u><u>\$ 7,229,566</u></u>
<b>LIABILITIES AND NET POSITION</b>		
Current Liabilities:		
Accounts payable and accrued liabilities	\$ 3,339,898	\$ 2,228,553
Unearned revenue	5,259,540	3,149,230
Total Current Liabilities	<u>8,599,438</u>	<u>5,377,783</u>
Long-Term Liabilities:		
Due within one year:		
Compensated absences	172,945	143,376
Lease liability	228,453	212,969
Due in more than one year:		
Compensated absences	35,423	29,366
Lease liability	357,613	586,066
Total Long-Term Liabilities	<u>794,434</u>	<u>971,777</u>
Total Liabilities	<u>9,393,872</u>	<u>6,349,560</u>
Net Position:		
Net investment in capital assets	2,846	19,270
Unrestricted	823,695	860,736
Total Net Position	<u>826,541</u>	<u>880,006</u>
<b>Total Liabilities and Net Position</b>	<u><u>\$ 10,220,413</u></u>	<u><u>\$ 7,229,566</u></u>

The accompanying notes to the financial statements are an integral part of these statements.

**CAREERSOURCE FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES**

YEAR ENDED JUNE 30, 2025

Functions/Programs	Expenses	Program Revenues			Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Governmental Activities
Governmental Activities:					
Economic environment					
Incumbent worker training	\$ 1,155,574	\$ -	\$ 1,155,574	\$ -	\$ -
Quick response training	6,629,870	-	6,629,870	-	-
Other program costs	12,091,182	-	11,906,696	-	(184,486)
Total Governmental Activities	<u>\$19,876,626</u>	<u>\$ -</u>	<u>\$19,692,140</u>	<u>\$ -</u>	<u>\$ (184,486)</u>
General Revenue:					
Miscellaneous					131,021
Total General Revenue					131,021
Change in net position					(53,465)
Net position, beginning of year					880,006
Net position, end of year					\$ 826,541

The accompanying notes to the financial statements are an integral part of these statements.



**CAREERSOURCE FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES**

YEAR ENDED JUNE 30, 2024

Functions/Programs	Expenses	Program Revenues			Net (Expense) Revenue and Changes in Net Position
		Charges for Services	Operating Grants and Contributions	Capital Grants and Contributions	Governmental Activities
Governmental Activities:					
Economic environment					
Incumbent worker training	\$ 1,399,637	\$ -	\$ 1,399,637	\$ -	\$ -
Quick response training	5,112,245	-	5,112,245	-	-
Other program costs	14,015,063	-	13,926,632	-	(88,431)
Total Governmental Activities	<u>\$20,526,945</u>	<u>\$ -</u>	<u>\$20,438,514</u>	<u>\$ -</u>	<u>\$ (88,431)</u>
General Revenue:					
Miscellaneous					67,518
Total General Revenue					<u>67,518</u>
Change in net position					(20,913)
Net position, beginning of year					<u>900,919</u>
Net position, end of year					<u>\$ 880,006</u>

The accompanying notes to the financial statements are an integral part of these statements.

**CAREERSOURCE FLORIDA, INC.**  
**BALANCE SHEETS**  
**GOVERNMENTAL FUND TYPES – GENERAL FUND**

*JUNE 30, 2025 AND 2024*

	<b>2025</b>	<b>2024</b>
<b>ASSETS</b>		
Current Assets:		
Cash	\$ 7,603,116	\$ 2,999,089
Grants and contracts receivable	2,048,382	3,469,638
Prepaid expenses	108,620	97,203
<b>Total Current Assets</b>	<b>\$ 9,760,118</b>	<b>\$ 6,565,930</b>
<b>LIABILITIES, DEFERRED INFLOWS, AND FUND BALANCE</b>		
Current Liabilities:		
Accounts payable and accrued liabilities	\$ 3,339,898	\$ 2,228,553
Unearned revenue	5,259,540	3,149,230
<b>Total Current Liabilities</b>	<b>8,599,438</b>	<b>5,377,783</b>
Deferred Inflows of Resources:		
Unavailable revenue	91,760	-
Fund Balance:		
Non-spendable - prepaid expenses	108,620	97,203
Unassigned	960,300	1,090,944
Fund Balance	1,068,920	1,188,147
<b>Total Liabilities, Deferred Inflows, and Fund Balance</b>	<b>\$ 9,760,118</b>	<b>\$ 6,565,930</b>

The accompanying notes to the financial statements are an integral part of these statements.

**CAREERSOURCE FLORIDA, INC.****RECONCILIATION OF THE BALANCE SHEETS OF THE GOVERNMENTAL FUND TO THE STATEMENTS OF NET POSITION***JUNE 30, 2025 AND 2024*

	<b>2025</b>	<b>2024</b>
Total fund balance of governmental fund	\$ 1,068,920	\$ 1,188,147
Amounts reported for governmental activities in the statements of net position are different because:		
Long-term liabilities are not due and payable in the current period and, therefore, are not reported in the funds. These liabilities consist of:		
Compensated absences	(208,368)	(172,742)
Lease liability	(586,066)	(799,035)
Amounts to be collected under receivables that are not available to pay for the current period's expenditures and are reported as a deferred inflow of resources in the fund.	91,760	-
Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the fund.	2,846	19,720
Lease right-to-use assets used in governmental activities are not financial resources and, therefore, are not reported in the fund.	457,449	643,916
Net position of governmental activities	<u>\$ 826,541</u>	<u>\$ 880,006</u>

The accompanying notes to the financial statements are an integral part of these statements.

**CAREERSOURCE FLORIDA, INC.****STATEMENTS OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCE  
GOVERNMENTAL FUND TYPE - GENERAL FUND***YEARS ENDED JUNE 30, 2025 AND 2024*

	<b>2025</b>	<b>2024</b>
Revenue:		
Intergovernmental revenue	\$ 19,600,380	\$ 20,438,514
Miscellaneous	131,021	67,518
Total Revenue	19,731,401	20,506,032
Expenditures:		
Other program costs	7,563,829	9,975,617
Grants and aids	7,785,444	6,511,882
Salaries and benefits	3,246,854	2,961,123
Administration contracts	444,863	399,423
Occupancy	234,263	232,066
Board meetings and travel	100,295	164,240
Dues and subscriptions	82,020	85,899
Office expenses	70,775	67,868
Travel	65,030	66,727
Professional fees and consultants	79,986	50,274
Insurance	19,590	15,436
Telephone and communications	14,277	13,495
Training and registrations	143,402	-
Total Expenditures	19,850,628	20,544,050
Net change in fund balance	(119,227)	(38,018)
Fund balance at beginning of year	1,188,147	1,226,165
Fund balance at end of year	\$ 1,068,920	\$ 1,188,147

The accompanying notes to the financial statements are an integral part of these statements.

**CAREERSOURCE FLORIDA, INC.****RECONCILIATION OF THE STATEMENTS OF REVENUES, EXPENDITURES, AND  
CHANGES IN FUND BALANCE OF THE GOVERNMENTAL FUND TO THE  
STATEMENTS OF ACTIVITIES***YEARS ENDED JUNE 30, 2025 AND 2024*

	<b>2025</b>	<b>2024</b>
Net change in fund balance - total governmental fund	\$ (119,227)	\$ (38,018)
Amounts reported for governmental activities in the statements of net position are different because:		
Some expenses reported in the statements of activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental fund:		
Unused compensated absences	(35,626)	43,815
Lease liability	212,969	195,507
Receivables uncollected within 60 days of year-end are unavailable to pay for current period expenditures and are reported as a deferred inflow of resources in the fund.	91,760	-
Governmental funds report capital outlays as expenditures. However, in the statements of activities, the cost of those assets is allocated over their estimated useful lives as depreciation and amortization expense:		
Depreciation and amortization expense on capital assets	(16,874)	(39,309)
Amortization expense on lease right-to-use assets	(186,467)	(182,908)
Change in net position of governmental activities	<u>\$ (53,465)</u>	<u>\$ (20,913)</u>

The accompanying notes to the financial statements are an integral part of these statements.

# CAREERSOURCE FLORIDA, INC.

## NOTES TO THE FINANCIAL STATEMENTS

JUNE 30, 2025 AND 2024

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### Note 1—Summary of significant accounting policies

*Reporting Entity* – CareerSource Florida, Inc. (“CareerSource Florida” or “the Organization”) is a not-for-profit corporation created by Chapter 445 of the Florida Statutes. Chapter 2000-165, Laws of Florida, known as the Workforce Innovation Act of 2000, superseded by the Workforce Innovation and Opportunity Act of 2014, created the corporation, which became effective July 1, 2000. This corporation is required to be registered, incorporated, organized, and operated in compliance with Chapter 617, Florida Statutes, as a nonentity of State government.

CareerSource Florida is the principal workforce policy organization for the State of Florida and the local workforce boards. The Florida Workforce System connects employers with qualified, skilled talent and Floridians with employment and career development opportunities to achieve economic prosperity. The Organization is administratively housed within the Department of Commerce (“FloridaCommerce”), and contracts with FloridaCommerce to implement its strategic policies and administer the workforce system.

CareerSource Florida is governed by a Board of Directors (the Board), whose membership and appointment is determined by the Governor of the State of Florida and must be consistent with Public Law No. 113-128, Title I, Section 101(b) since it serves as the State’s Workforce Investment Board pursuant to law.

Though the State of Florida appoints the Board, it has no further accountability. Therefore, for financial reporting purposes, CareerSource Florida is a related organization of the State. There are no component units included in the accompanying financial statements.

The accounting policies of the Organization conform to generally accepted accounting principles (“GAAP”) as applied to governmental units. The more significant accounting policies used by the Organization are described below. The Organization’s reporting entity applies all relevant Governmental Accounting Standards Board (“GASB”) pronouncements.

*Government-Wide Financial Statements* – The government-wide financial statements (i.e., the statements of net position and the statements of activities) report information on all of the nonfiduciary activities of CareerSource Florida. The focus of the government-wide statements is on the sustainability of CareerSource Florida as an entity and the change in aggregate financial position resulting from the activities of the fiscal period.

The statements of activities demonstrate the degree to which the direct expenses of a given function are offset by program revenues. Direct expenses are those that are clearly identifiable with a specific function. Program revenues include operating grants and contributions used to recover expense of a given function or program. Other items not properly included among program revenues are reported instead as general revenues.

While separate government-wide and fund financial statements are presented, they are interrelated. The governmental activities column incorporates data from the governmental fund.

*Fund Financial Statements* – The fund financial statements provide information about CareerSource Florida’s governmental fund. Separate statements for the governmental fund are presented. CareerSource Florida reports one governmental fund, the General Fund, which is used to account for all financial resources of the Organization. The general fund is reported as a major fund.

*Measurement Focus, Basis of Accounting, and Financial Statement Presentation* – The accounting and financial reporting treatment is determined by the applicable measurement focus and basis of accounting. Measurement focus indicates the type of resources being measured such as current financial resources or economic resources. The basis of accounting indicates the timing of transactions or events for recognition in the financial statements.

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

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**Note 1—Summary of significant accounting policies (continued)**

The government-wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recorded when earned and expenses are recorded when a liability is incurred, regardless of the timing of related cash flows. Grants and similar items are recognized as revenue as soon as all eligibility and timing requirements imposed by the provider have been met.

The governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues are recognized as soon as they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the government considers revenues to be available if they are collected within 60 days of the end of the current fiscal period. Expenditures are generally recorded when a liability is incurred, as under accrual accounting. However, expenditures related to compensated absences and lease payables are recorded only when payment is due. General capital asset acquisitions are reported as expenditures in governmental funds.

Expenditure-driven grants are recognized as revenue when the qualifying expenditures have been incurred and all other eligibility requirements have been met, and the amount is received during the period or within the availability period for this revenue source (within 60 days of year-end). All other revenue items are considered to be measurable and available only when cash is received by the Organization.

*Budgetary Information* – GASB requires budgetary comparisons to be presented for the general fund that has a legally adopted budget. Management has determined that CareerSource Florida is not legally required to adopt an operating budget by the FloridaCommerce, Florida Statutes, or any federal regulation. Therefore, no budgetary comparison schedules have been presented.

*Use of Estimates* – The preparation of U.S. GAAP financial statements requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and changes therein, and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

*Cash* – CareerSource Florida's cash are considered to be cash on hand and demand deposit checking accounts.

*Grants and Contracts Receivable* – Grants and contracts receivable consist primarily of amounts due from FloridaCommerce. Management determines the allowance for doubtful accounts based on specific identification and a general reserve based on management's experience with prior collections and the current economic environment. Management's estimate of potential uncollectible amounts associated with grants and contracts receivable is immaterial; accordingly, no allowance for doubtful accounts has been recorded.

*Capital Assets* – Capital assets, which include property and equipment, are reported in the government-wide financial statements. Capital assets are defined by CareerSource Florida as assets with an initial, individual cost of more than \$5,000 and an estimated useful life in excess of one year. As the Organization acquires additional capital assets each period they are capitalized and reported at historical cost. The reported value excludes normal maintenance and repairs which are essentially amounts spent in relation to capital assets that do not increase the capacity or efficiency of the item or increase its estimated useful life. Donated capital assets are recorded at their estimated acquisition value at the date of donation.

Property and equipment are depreciated using the straight-line method over the following estimated useful lives:

Leasehold improvements	5 Years
Office furniture	7 Years
Office equipment and computers	5 Years

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

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**Note 1—Summary of significant accounting policies (continued)**

Capital assets acquired by CareerSource Florida are considered to be owned by the Organization. However, funding sources may maintain an equitable interest in the property purchased with grant monies as well as the right to determine the use of any proceeds from the sale of these assets. The Federal government has a reversionary interest in those assets purchased with its funds which have a cost of \$5,000 or more and an estimated useful life of at least one year.

*Leases* – Lease contracts that provide the Organization with control of a non-financial asset, such as land, buildings, or equipment, for a period of time in excess of twelve months are reported as a leased asset with a related lease liability. The lease liability is recorded at the present value of future lease payments, including fixed payments, variable payments based on an index or fixed rate and reasonably certain residual guarantees. The intangible leased asset is recorded for the same amount as the related lease liability plus any prepayments and initial direct costs to place the asset in service. Leased assets are amortized over the shorter of the useful life of the asset or the lease term. The lease liability is reduced for lease payments made, less the interest portion of the lease payment.

*Compensated Absences* – Permanent full-time employees are granted vacation benefits in varying amounts to specified maximums depending on tenure with the Organization. CareerSource Florida employees' annual leave balances in excess of 360 hours will be transferred to sick leave on an hour-for-hour basis. Sick leave is accrued but generally only paid out at 25% of the accrued balance after ten years of service up to a stated maximum. However, the employment contract with the President stipulates that sick leave is paid in accordance with the employment contract. CareerSource Florida evaluated compensated absences to recognize balances that are more likely than not to be paid as the respective liability.

*Revenue Recognition* – Revenues are recognized when earned. CareerSource Florida received advanced funds from the State of Florida to administer the Quick Response Training program. Under this program, the Organization awards funds to businesses that provide training to the businesses' employees via local community colleges and/or state universities. CareerSource Florida defers the revenue relating to these programs until the earnings process is substantially complete, which the Organization has determined occurs when the training has taken place and the college or business has submitted requests for reimbursement.

*Deferred Inflows of Resources* – Deferred Inflows of Resources, represents an acquisition of net assets that applies to a future period and so will not be recognized as revenue until then. CareerSource Florida has unavailable revenue related to grants that meets the criteria.

*Transferred Investment Income* – As a condition of its grants and in compliance with 2 CFR 200.305 of the Uniform Guidance as adopted by CareerSource Florida, all interest above \$500 earned on funds advanced from the State of Florida is due and payable to the State of Florida. At June 30, 2025 and 2024, the applicable liability due to the State of Florida is included in accrued liabilities in the statements of net position.

*Categories and Classification of Net Position and Fund Balance – Net Position Flow Assumption* – Sometimes CareerSource Florida will fund outlays for a particular purpose from both restricted (e.g., restricted grant proceeds) and unrestricted resources. In order to calculate the amounts to report as restricted – net position and unrestricted – net position in the government-wide financial statements, a flow assumption must be made about the order in which the resources are considered to be applied. It is CareerSource Florida's policy to consider restricted – net position to have been depleted before unrestricted – net position is applied.



**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

JUNE 30, 2025 AND 2024

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**Note 1—Summary of significant accounting policies (continued)**

*Fund Balance Flow Assumptions* – Sometimes CareerSource Florida will fund outlays for a particular purpose from both restricted and unrestricted resources (the total of committed, assigned, and unassigned fund balance). In order to calculate the amounts to report as restricted, committed, assigned, and unassigned fund balance in the governmental fund financial statements a flow assumption must be made about the order in which the resources are considered to be applied. It is CareerSource Florida's policy to consider restricted fund balance to have been depleted before using any of the components of unrestricted fund balance. Further, when the components of unrestricted fund balance can be used for the same purpose, committed fund balance is depleted first, followed by assigned fund balance. Unassigned fund balance is applied last.

*Fund Balance Policies* – Fund balance of governmental funds is reported in various categories based on the nature of any limitations requiring the use of resources for specific purposes. The Organization itself can establish limitations on the use of resources through either a commitment (committed fund balance) or an assignment (assigned fund balance).

The provisions of GASB Statement No. 54, Fund Balance Reporting and Governmental Fund Type Definitions, specifies the following classifications:

- *Nonspendable Fund Balance* – Nonspendable fund balances are amounts that cannot be spent because they are either (a) not in spendable form or (b) legally or contractually required to be maintained intact.
- *Restricted Fund Balance* – Restricted fund balances are restricted when constraints placed on the use of resources are either: (a) externally imposed by creditors, grantors, contributors, or laws or regulations of other governments; or (b) imposed by law through constitutional provisions or enabling legislation. As of June 30, 2025 and 2024 there are no amounts that are classified as restricted fund balance.
- *Committed Fund Balance* – The committed fund balance classification includes amounts that can be used only for the specific purposes determined by a formal action of the Organization's highest level of decision-making authority. The Board of Directors is the highest level of decision-making authority for the Organization that can, by adoption of a board resolution prior to the end of the fiscal year, commit fund balance. Once adopted, the limitation imposed by the board resolution remains in place until a similar action is taken (the adoption of another board resolution) to remove or revise the limitation. As of June 30, 2025 and 2024 there are no amounts that are classified as committed fund balance.
- *Assigned Fund Balance* – The assigned fund balance consists of amounts that are constrained by a less-than-formal action of the Organization's governing authority, or by an individual or body to whom the governing authority has delegated this responsibility. In addition, residual balances in capital projects and debt service funds are considered assigned for the general purpose of the respective fund. Unlike commitments, assignments generally only exist temporarily. In other words, an additional action does not normally have to be taken for the removal of an assignment. Conversely, as discussed above, an additional action is essential to either remove or revise a commitment. As of June 30, 2025 and 2024 there are no amounts that are classified as assigned fund balance.
- *Unassigned Fund Balance* – Unassigned fund balance is the residual classification for the General Fund.

*Income Taxes* – CareerSource Florida is generally exempt from income taxes under Section 501(c)(3) of the Internal Revenue Code. The Organization is exempt from state income taxes on related income pursuant to Chapter 220.13 of the Florida Statutes. As a charitable organization, only unrelated business income, as defined by Section 509(a)(1) of the Internal Revenue Code, is subject to federal income tax. CareerSource Florida currently has no unrelated business income. Therefore, no provision for income taxes has been made in the accompanying financial statements.

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

JUNE 30, 2025 AND 2024

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**Note 1—Summary of significant accounting policies (continued)**

CareerSource Florida has reviewed and evaluated the relevant technical merits of each of its tax positions in accordance with accounting principles generally accepted in the United States of America for accounting for uncertainty in income taxes, and determined that there are no uncertain tax positions that would have a material impact on the financial statements of the Organization.

*Functional Allocation of Expenses* – Expenses are charged directly to programs that benefit from the expense where possible, or to the indirect cost pool. Indirect expenses are allocated to programs based on the percentage of total funds from each program utilized across the entire Organization from the prior quarter.

*Subsequent Events* – Management has evaluated subsequent events through the date that the financial statements were available to be issued, **November XX, 2025**, and determined there are no events that require disclosure. No subsequent events occurring after this date have been evaluated for inclusion in these financial statements.

Recent Accounting Guidance:

*GASB Statement No. 101* – In June 2022, GASB issued GASB Statement No. 101, *Compensated Absences*. The objective of this Statement is to better meet the information needs of financial statement users by updating the recognition and measurement guidance for compensated absences. That objective is achieved by aligning the recognition and measurement guidance under a unified model and by amending certain previously required disclosures. The requirements of this Statement are effective for fiscal years beginning after December 15, 2023, and all reporting periods thereafter. There have been no significant changes in accounting policies or practices related to the implementation of GASB Statement No. 101 during the reporting period.

*GASB Statement No. 102* – In December 2023, GASB issued GASB Statement No. 102, *Certain Risk Disclosures*. This Statement requires a government to assess whether a concentration or constraint makes the primary government reporting unit or other reporting units that report a liability for revenue debt vulnerable to the risk of a substantial impact. Additionally, this Statement requires a government to assess whether an event or events associated with a concentration or constraint that could cause the substantial impact have occurred, have begun to occur, or are more likely than not to begin to occur within 12 months of the date the financial statements are issued. If a government determines that those criteria for disclosure have been met for a concentration or constraint, it should disclose information in notes to financial statements in sufficient detail to enable users of financial statements to understand the nature of the circumstances disclosed and the government's vulnerability to the risk of a substantial impact. The requirements of this Statement are effective for fiscal years beginning after June 15, 2024, and all reporting periods thereafter. There have been no significant changes in accounting policies, practices, or disclosures related to the implementation of GASB Statement No. 102 during the reporting period.

*GASB Statement No. 103* – In April 2024, GASB issued GASB Statement No. 103, *Financial Reporting Model Improvements*. The objective of this Statement is to improve key components of the financial reporting model to enhance its effectiveness in providing information that is essential for decision making and assessing a government's accountability. This Statement also addresses certain application issues. Areas affected include management's discussion and analysis, unusual or infrequent items, presentation of the proprietary fund statement of revenues, expenses, and changes in fund net position, major component unit information, and budgetary comparison information. The requirements of this Statement are effective for fiscal years beginning after June 15, 2025, and all reporting periods thereafter. The Organization is currently evaluating the impact of this guidance on its financial statements.

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

**Note 2—Cash**

Florida Statutes provide for risk sharing collateral pools by banks and savings and loan associations. These pools collateralize local government deposits and certificates of deposit with participating depositories. CareerSource Florida's demand deposits are placed in such authorized depositories.

Custodial credit risk for deposits is the risk that in the event of a bank failure, the Organization's deposits may not be returned or the Organization will not be able to recover collateral securities in the possession of an outside party. At June 30, 2025 and 2024, the carrying amount of CareerSource Florida, Inc.'s deposits was \$7,603,116 and \$2,999,089, respectively, and the bank balance of CareerSource Florida, Inc.'s deposits was \$7,826,421 and \$3,350,912, respectively. The bank balance is insured up to Federal Deposit Insurance Corporation ("FDIC") limits or by collateral held by CareerSource Florida's custodial bank which is pledged to a state trust fund that provides security for amounts held in excess of FDIC coverage in accordance with the Florida Security for Deposits Act, Chapter 280, Florida Statutes. The Florida Security for Public Deposits Act established guidelines for qualification and participation by banks and savings associations, procedures for the administration of the collateral requirements, and characteristics of eligible collateral.

**Note 3—Capital assets, net**

The following is a summary of changes in capital assets during the years ended June 30, 2025 and 2024:

	<b>July 1, 2024</b>	<b>Increases</b>	<b>Decreases</b>	<b>June 30, 2025</b>
Capital assets:				
Leasehold improvements	\$ 17,505	\$ -	\$ -	\$ 17,505
Office furniture	219,652	-	-	219,652
Office equipment and computers	309,118	-	-	309,118
Total capital assets	546,275	-	-	546,275
Less accumulated depreciation and amortization:				
Leasehold improvements	(17,505)	-	-	(17,505)
Office furniture	(208,863)	(10,789)	-	(219,652)
Office equipment and computers	(300,187)	(6,085)	-	(306,272)
Total accumulated depreciation and amortization	(526,555)	(16,874)	-	(543,429)
Lease right-to-use assets	\$ 19,720	\$ (16,874)	\$ -	\$ 2,846

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

**Note 3—Capital assets, net (continued)**

	<b>July 1, 2023</b>	<b>Increases</b>	<b>Decreases</b>	<b>June 30, 2024</b>
Capital assets:				
Leasehold improvements	\$ 17,505	\$ -	\$ -	\$ 17,505
Office furniture	219,652	-	-	219,652
Office equipment and computers	309,118	-	-	309,118
Total capital assets	546,275	-	-	546,275
Less accumulated depreciation and amortization:				
Leasehold improvements	(17,505)	-	-	(17,505)
Office furniture	(177,485)	(31,378)	-	(208,863)
Office equipment and computers	(292,256)	(7,931)	-	(300,187)
Total accumulated depreciation and amortization	(487,246)	(39,309)	-	(526,555)
Lease right-to-use assets	\$ 59,029	\$ (39,309)	\$ -	\$ 19,720

Depreciation and amortization expense related to capital assets was \$16,874 and \$39,309 for the years ended June 30, 2025 and 2024, respectively, which was charged to other program costs in the statements of activities.

**Note 4—Leases**

The Organization leases office facilities under an agreement that expires in November 2027. The discount rate used as the interest rate was 4.25%, which is the Organization's incremental borrowing rate as of the commencement date of the lease.

The Organization also leases office equipment under an agreement that expires in March 2029. The discount rate used as the interest rate was 8.50%, which is the Organization's incremental borrowing rate as of the commencement date of the lease.

The following is a summary of changes in the lease right-to-use asset during the years ended June 30, 2025 and 2024:

	<b>July 1, 2024</b>	<b>Increases</b>	<b>Decreases</b>	<b>June 30, 2025</b>
Lease right-to-use assets:				
Facilities	\$ 1,862,823	\$ -	\$ -	\$ 1,862,823
Office equipment	23,639	-	-	23,639
Total lease right-to-use assets	1,886,462	-	-	1,886,462
Less accumulated amortization:				
Facilities	(1,241,377)	(181,739)	-	(1,423,116)
Office equipment	(1,169)	(4,728)	-	(5,897)
Total accumulated depreciation and amortization	(1,242,546)	(186,467)	-	(1,429,013)
Lease right-to-use assets, net	\$ 643,916	\$ (186,467)	\$ -	\$ 457,449

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

**Note 4—Leases (continued)**

	<u>July 1, 2023</u>	<u>Increases</u>	<u>Decreases</u>	<u>June 30, 2024</u>
Lease right-to-use assets:				
Facilities	\$ 1,862,823	\$ -	\$ -	\$ 1,862,823
Office equipment	-	23,639	-	23,639
Total lease right-to-use assets	<u>1,862,823</u>	<u>23,639</u>	<u>-</u>	<u>1,886,462</u>
Less accumulated amortization:				
Facilities	(1,059,638)	(181,739)	-	(1,241,377)
Office equipment	-	(1,169)	-	(1,169)
Total accumulated depreciation and amortization	<u>(1,059,638)</u>	<u>(182,908)</u>	<u>-</u>	<u>(1,242,546)</u>
Lease right-to-use assets, net	<u>\$ 803,185</u>	<u>\$ (159,269)</u>	<u>\$ -</u>	<u>\$ 643,916</u>

Amortization expense related to the lease right-to-use assets was \$186,467 and \$182,908 for the years ended June 30, 2025 and 2024, respectively, which was charged to other program costs in the statements of activities.

The following is a summary of changes in the lease liability during the years ended June 30, 2025 and 2024:

	<u>July 1, 2024</u>	<u>Increases</u>	<u>Decreases</u>	<u>June 30, 2025</u>	<u>Due Within One Year</u>
Lease Liability	<u>\$ 799,035</u>	<u>\$ -</u>	<u>\$ (212,969)</u>	<u>\$ 586,066</u>	<u>\$ 228,453</u>

	<u>July 1, 2023</u>	<u>Increases</u>	<u>Decreases</u>	<u>June 30, 2024</u>	<u>Due Within One Year</u>
Lease Liability	<u>\$ 970,903</u>	<u>\$ 23,639</u>	<u>\$ (195,507)</u>	<u>\$ 799,035</u>	<u>\$ 212,969</u>

<u>Years Ending June 30,</u>	<u>Principal</u>	<u>Interst</u>	<u>Total</u>
2026	\$ 228,452	\$ 21,218	\$ 249,670
2027	244,732	10,999	255,731
2028	108,668	1,704	110,372
2029	4,214	151	4,365
Total	<u>\$ 586,066</u>	<u>\$ 34,072</u>	<u>\$ 620,138</u>

Future debt service requirements on the lease payable at June 30, 2025 are as follows:

Interest expense related to the lease liability was \$30,747 and \$38,015 for the years ended June 30, 2025 and 2024, respectively, which was charged to other program costs in the statements of activities.

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

**Note 5—Compensated absences**

The following is a summary of changes in compensated absences during the years ended June 30, 2025 and 2024:

	July 1, 2024	Net Change	June 30, 2025	Due Within One Year
Compensated absences	\$ 172,742	\$ 35,626	\$ 208,368	\$ 172,945

	July 1, 2023	Net Change	June 30, 2024	Due Within One Year
Compensated absences	\$ 216,557	\$ (43,815)	\$ 172,742	\$ 143,376

**Note 6—Retirement plan**

CareerSource Florida participates in a Safe Harbor 401k Plan (the Plan). The Plan covers all eligible employees of CareerSource Florida. Employer contributions are determined at the discretion of a fiduciary committee of CareerSource Florida and in accordance with the Internal Revenue Code. The Organization contributed a total of \$327,524 and \$284,141 to the Plan during the years ended June 30, 2025 and 2024, respectively. Employees are permitted to make contributions up to applicable Internal Revenue Code limits. Employees contributed \$159,026 and \$152,816 to the Plan during the years ended June 30, 2025 and 2024, respectively. Employees are immediately vested in their own contributions and earnings on those contributions. Employees become 100% vested in employer defined contributions after completing three years of service. For each of the years ended June 30, 2025 and 2024, plan forfeitures included in contribution expense totaled \$17,087 and \$20,003, respectively. Employer and employee contributions owed to the Plan as of June 30, 2025, and 2024 totaled \$-0- for both years. There were no expenses for the Plan paid for by CareerSource Florida during the years ended June 30, 2025 and 2024.

**Note 7—Commitments, concentrations, and contingencies**

See Note 4 for information on lease commitments.

*Significant Funding Source* – CareerSource Florida receives a substantial amount of its funding from the United States Department of Labor, the United States Department of Health and Human Services, and the United States Department of Education passed through the State of Florida, Department of Commerce, and funding from the State of Florida Department of Commerce directly. A significant reduction in the level of this funding, if this were to occur, could have an adverse effect on CareerSource Florida, Inc.'s programs and activities.

*Risk Management* – CareerSource Florida is exposed to various risks of loss related to torts; theft of, damage to and destruction of assets; errors and omissions; injuries to employees; and natural disasters. CareerSource Florida, Inc. has obtained insurance from commercial underwriters for the aforementioned risks, including workers' compensation for the years ended June 30, 2025 and 2024.

CareerSource Florida has not paid any settlements in excess of insurance coverage for each of the past three years. Furthermore, CareerSource Florida had no significant reduction in insurance coverage from the prior year.

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE FINANCIAL STATEMENTS**

*JUNE 30, 2025 AND 2024*

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**Note 7—Commitments, concentrations, and contingencies (continued)**

*Grants* – The grant revenue amounts received are subject to audit and adjustment by grantor agencies. If any expenses are disallowed by the grantor agencies as a result of such an audit, any claim for reimbursement to the grantor agencies would become a liability of CareerSource Florida. In the opinion of management, all grant expenses are in compliance with terms of the grant agreements and applicable Federal and State laws and regulations.

**Note 8—Related party transactions**

Receivables of \$2,037,210 and \$3,466,641 were due from the State of Florida, Department of Commerce and Department of Corrections, at June 30, 2025 and 2024, respectively, and are included in grants and contracts receivable in the statements of net position and in the balance sheets of the governmental fund type – general fund. Federal and State program revenue received through the State of Florida, Department of Commerce and Department of Corrections, for the years ended June 30, 2025 and 2024 was \$19,692,140 and \$20,438,514 respectively.

## OTHER REPORTS



**Report of Independent Auditor on Internal Control over Financial Reporting and on  
Compliance and Other Matters Based on an Audit of Financial Statements  
Performed in Accordance with *Government Auditing Standards***

PLACEHOLDER PAGE 1

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**Report of Independent Auditor on Compliance for Each Major Federal Awards Program  
and State Project and on Internal Control Over Compliance  
Required by the Uniform Guidance and Chapter 10.650, Rules of the Auditor General**

PLACEHOLDER PG 1

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**SUPPLEMENTARY INFORMATION**

**CAREERSOURCE FLORIDA, INC.**  
**SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS AND STATE FINANCIAL ASSISTANCE**

YEAR ENDED JUNE 30, 2025

<b>Grantor/Pass-Through Grantor/Program Title/Grant Number</b>	<b>Assistance Listing Number</b>	<b>Passed Through to Subrecipients</b>	<b>Federal Expenditures</b>
<b>FEDERAL</b>			
<b>United States Department of Labor:</b>			
Passed through FloridaCommerce:			
Employment Services Cluster:			
Wagner-Peyser Funded Activities	17.207	\$ -	\$ 1,956,370
Workforce Investment and Opportunity Act (WIOA) Cluster:			
WIA/WIOA Adult Program	17.258	-	1,751,292
WIA/WIOA Youth Activities	17.259	-	1,702,388
WIA/WIOA Dislocated Worker Formula Grants	17.278	-	3,343,223
Total Workforce Investment and Opportunity Act (WIOA) Cluster		-	6,796,903
<b>Total United States Department of Labor</b>		-	8,753,274
<b>U.S. Department of Commerce</b>			
Passed through Florida Dept of Economic Opportunity			
Broadband Opportunity Program	21.027	-	125,000
Broadband BEAD	21.027	-	249,949
<b>Total United States Department of Treasury</b>		-	374,949
<b>United States Department of Health and Human Services:</b>			
Passed through FloridaCommerce:			
Temporary Assistance for Needy Families (TANF)	93.558	-	753,256
<b>Total United States Department of Health and Human Services</b>		-	753,256
<b>Total Expenditures of Federal Awards</b>		\$ -	\$ 9,881,478
<b>STATE</b>			
<b>Florida Department of Economic Opportunity</b>			
Quick Response Training	40.026	\$ -	\$ 6,701,480
CareerSource Florida Operations	40.036	-	484,182
TANF Transitional Benefits Feasibility Study	40.036	-	-
<b>Total Florida Department of Economic Opportunity</b>		-	7,185,662
<b>Total Expenditures of State Financial Assistance</b>		-	7,185,662
<b>Total Expenditures of Federal Awards and State Financial Assistance</b>		\$ -	\$ 17,067,140

**CAREERSOURCE FLORIDA, INC.**  
**NOTES TO THE SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**  
**AND STATE FINANCIAL ASSISTANCE**

*YEAR ENDED JUNE 30, 2025*

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**Note 1—Basis of presentation**

The accompanying Schedule of Expenditures of Federal Awards and State Financial Assistance (the Schedule) includes the federal and state award activity of CareerSource Florida, Inc. ("CareerSource Florida" or "the Organization"). The information in this Schedule is presented in accordance with Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, Audits of States, Local Governments, and Non-Profit Organizations, Chapter 10.650, Rules of the Auditor General, and the special audit guidance provided by the Florida Department of Commerce. Therefore, some amounts presented in this Schedule may differ from amounts presented in, or used in the preparation of the basic financial statements. For purposes of the Schedule, federal awards and state financial assistance include all grants, contracts, and similar agreements entered into directly with the federal or state government and other passthrough entities. The Organization has obtained Assistance Listing Numbers (ALN) and Catalog of State Financial Assistance (CSFA) numbers to ensure that all programs have been identified in the Schedule. Clusters are separately identified within this Schedule.

**Note 2—Summary of significant accounting policies**

The Schedule was prepared on the modified accrual basis of accounting.

**Note 3—Contingencies**

Grant monies received and disbursed by the Organization are subject to review by the grantor agencies. Such audits may result in requests for reimbursement due to disallowed expenditures. Based upon prior experience, the Organization does not believe that such disallowance, if any, would have a material effect on the financial position of the Organization. As of June 30, 2025, there were no material questioned or disallowed costs as a result of grant audits in process or completed.

**Note 4—Noncash assistance**

The Organization did not receive any federal or state noncash assistance for the year ended June 30, 2025.

**Note 5—Indirect cost**

The Organization has elected not to use the 10 percent de minimis indirect cost rate as allowed under the Uniform Guidance.

**Note 6—Federally funded insurance**

The Organization did not receive federally funded insurance during the fiscal year ended June 30, 2025.

**Note 7—Federally funded loans**

The Organization has no federally funded loans as of June 30, 2025. No funds were expended in the form of loan or loan guarantees during the fiscal year ended June 30, 2025.

**CAREERSOURCE FLORIDA, INC.**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**

*YEAR ENDED JUNE 30, 2025*

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PLACEHOLDER PG 1

DRAFT



**CAREERSOURCE FLORIDA, INC.**  
**SCHEDULE OF FINDINGS AND QUESTIONED COSTS**

*YEAR ENDED JUNE 30, 2025*

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PLACEHOLDER PG 1

DRAFT

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

## Action Item 2

### REVISIONS TO CAREERSOURCE FLORIDA WORKFORCE POLICY 092 STAFF TRAINING AND CREDENTIALING

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state board establishes and directs the vision for the state workforce system. Federal and state law describes what items the state workforce development board (SWDB) must review, approve, or consider, including workforce development policies. CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency. CareerSource Florida and FloridaCommerce reviewed CareerSource Florida Workforce Policy 092 – One-Stop Staff Credentialing and Skill Standards.


Consistent with [445.007, Florida Statutes](#) and [20 CFR 679.370](#), Local Workforce Development Boards (LWDBs) are charged with the oversight of local area workforce investment activities and workforce program development. Workforce Policy 092 – One-Stop Staff Credentialing is revised as Workforce Policy 092 – Staff Training and Credentialing to ensure that all staff providing direct customer service meet minimum credentialing and training standards as established by the CareerSource Florida Board of Directors and FloridaCommerce. This revised policy provides guidance to all LWDBs to ensure staff are knowledgeable, well-trained, and capable of delivering high-quality customer service to jobseekers and employers. The policy provides a framework to ensure continuous improvement by requiring career center staff to obtain continuing education units (CEU) and for LWDBs to develop local operating procedures related to training.

CareerSource Florida and FloridaCommerce worked closely with LWDBs to refine policy goals, establish measurable outcomes, and build systems to implement and monitor progress. This policy was sent to all 21 LWDBs for consultation from October 9-October 17, 2025. CareerSource Florida received 70 comments from 11 LWDBs. A thorough review of the comments was conducted by CareerSource Florida and FloridaCommerce. 68.60% of the feedback was incorporated into the policy.

This policy applies to CareerSource Florida, FloridaCommerce, all 21 LWDBs and all regional workforce development areas.

## **FOR CONSIDERATION**

- **Approve revisions to CareerSource Florida Workforce Policy 092 – Staff Training and Credentialing.**

 <h2 style="text-align: center;">Workforce Policy</h2>		<p style="text-align: center;"><b>POLICY NUMBER</b></p> <p style="text-align: center;"><b>O92</b></p>
<b>Title:</b>	Staff Training and Credentialing	
<b>Policy Type:</b>	Operational	
<b>Program:</b>	Workforce Innovation and Opportunity Act	
<b>Effective:</b>		<b>Revised:</b> 

## I. PURPOSE AND SCOPE

State and federal law,<sup>1</sup> directs Local Workforce Development Boards (LWDBs) to oversee local workforce investment activities and workforce program development. LWDBs must ensure that staff meet credentialing and training standards as established by the CareerSource Florida Board of Directors and Florida Department of Commerce (FloridaCommerce). The goal is to ensure staff are knowledgeable, well-trained, and capable of delivering high-quality customer service to jobseekers and employers.

This policy applies to all LWDBs and their affiliated career and one-stop centers. LWDB LOPs must outline [Tier I](#) (core for all staff providing direct customer service), [Tier II](#), and specialized training. LWDBs should also include opportunities for continuing education, traditional and narrated trainings, and other workforce training provided by FloridaCommerce, Workforce Innovation and Opportunity Act (WIOA) partners, and Florida Workforce Integrated Networking Systems (FL WINS). This training should cover program-specific areas to ensure awareness of workforce system strategies and operations, improve efficiency and effectiveness, and enhance customer service and support.

## II. KEY OBJECTIVES

1. Require all frontline and local area staff providing direct customer service to complete FL WINS Cross Training and earn the Florida Workforce Professional Tier I Certificate within 60 days of hire.
2. Maintain ongoing professional development through annual completion of no less than 15 hours of continuing education units (CEU), approved as part of the WIOA local plan.<sup>2</sup>
3. Standardize credentialing and training requirements across all LWDBs, including LWDB-operated One-Stop Career Centers.

<sup>1</sup> § [445.007, Fla. Stat.](#); [20 CFR 679.370](#)

<sup>2</sup> Instructions for WIOA Local and Regional Workforce Plan Guidelines

4. Promote competency in customer service, communication, technology, and program-specific knowledge.
5. Document and verify staff training and certification through consistent recordkeeping and reporting protocols.

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

LWDBs must establish clear local operating procedures (LOPs) LOPs must ensure all frontline and local area staff providing direct customer service, including staff engaging with jobseekers, training, and business customers, meet the following minimum credentialing standards:

#### **A. Minimum Credentialing Standards**

All hired frontline and local area staff providing direct customer service must successfully complete training and obtain the Tier I Certificate and complete FL WINS Cross Training within 60 days of their hire date and in alignment with technical assistance issued by FloridaCommerce. Supervisors may identify staff who have previously obtained Tier I certification but later demonstrate difficulty making timely eligibility determinations, who have poor performance outcomes for jobseekers or businesses, or who have exhibited difficulties in providing quality customer services as candidates who need to be retrained.

##### **1. Tier I Certificate Program**

The Tier I Certification program is mandatory for all frontline and local area staff providing direct customer service. It covers basic workforce concepts, customer service, and workforce system information. Staff who pass the Tier I exam earn the Florida Certified Workforce Professional (FCWP) designation.

##### **2. Alternative Training**

LWDBs may propose training alternatives to Tier I training, but training must be equivalent to Tier I training and approved by CareerSource Florida and FloridaCommerce. . Minimum skill requirements for Tier I Certification or an equivalent and approved alternative to Tier I training include:

- a. Deliver effective customer service,<sup>3</sup> including in-person, written, and verbal methods, and provide core employment services such as job search assistance, resume preparation, interview preparation, career counseling, referral to training and education programs, and job readiness workshops.
- b. Provide labor exchange services including job matching, placement, recruitment support, job fairs, hiring events, and access to online employment tools. Program specific service requirements focus on determining eligibility and reducing service time.
- c. Understand and apply the Eligible Training Provider List and promote Florida-specific work-based learning opportunities, including pre-apprenticeships,

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<sup>3</sup> Examples include the basic and individualized career services described in [20 CFR 678.430](#) and the Core Business Services cited in [20 CFR 678.435](#).

- 77 apprenticeships, internships, work experience, and on-the-job training.
- 78 d. Understand and advise business and training providers on the Master
- 79 Credentials List.
- 80 e. Apply knowledge of WIOA, including Florida's approved WIOA state plan, and
- 81 the LWDB's WIOA local plan.
- 82 f. Delivery of efficient, effective, and aligned outreach and services to local
- 83 businesses and business organizations, including economic development
- 84 organizations.
- 85 g. Implement priority of service for veterans as required by [38 U.S.C. 4215](#) and [20](#)
- 86 [CFR 1010](#).
- 87 h. Effective use of labor market data from FloridaCommerce.
- 88 i. Implement state workforce policies and technical assistance, guidance and use
- 89 other resources from FloridaCommerce and CareerSource Florida.
- 90 j. Use of career center technology, case management systems, and online
- 91 resources.
- 92 k. Track and contribute to performance indicators to support continuous
- 93 improvement.
- 94 l. Ensure accessibility and apply basic assistive technology to support individuals
- 95 with disabilities, consistent with WIOA Sec. 188, and the Americans with
- 96 Disabilities Act Section 504.
- 97 m. Follow safety and security protocols including continuity of operations plans
- 98 (COOP), disaster response, and cyberattacks.
- 99 n. Uphold ethics and conflict of interest in contracting.

### 100

### 101 **3. WIOA Partner Cross Training**

### 102

103 The FL WINS learning management system is used to help teach, guide, and

104 provide feedback to assist agency staff.

105

106 In addition to completing Tier I training or its approved equivalent, all frontline and

107 local area staff providing direct customer service must complete assigned modules

108 within the FL WINS learning management system, to include the Intro to FL WINS

109 and FloridaCommerce and CSF/LWDB Essentials, within 60 days of hire date.

110

### 111 **4. Continuing Education Unit (CEU)**

### 112

113 After completing the minimum credentialing requirement (including Tier I or Tier I

114 approved equivalent training and FL WINS cross training), frontline and local area

115 staff providing direct customer service are required to complete a minimum of 15

116 continuing education units (CEUs) annually to maintain ongoing professional

117 development as a FCWP.

118

119 To be eligible to achieve recognition for advanced training levels in a board

120 designated specialization (i.e., business services, veteran services, serving those

121 on public benefits, frontline services), staff members may complete the following:

122

- 123 a. 30 CEUs for Bronze status.
- 124 b. 60 CEUs Silver status.
- 125 c. 75 CEUs Gold status; and
- 126 d. 100 CEUs Platinum status.

LWDBs must include a description of advanced training recognition requirements and how CEUs will be identified, reviewed, and assigned in their LOPs.

If a staff member is rehired and previously attained from the Tier I Certification, they must document the certification and complete 15 hours of continuing education units (CEU) within the calendar year of their new hire date.

LWDBs must ensure documentation demonstrating staff completion of required training is tracked and stored, and CEUs must be performed, tracked, and stored consistently and in alignment with the LWDB approved LOPs, technical assistance, and guidance issued by FloridaCommerce.

## **5. Tier II Program for Frontline and Local Area Staff**

The Tier II training program offers optional, on-demand, self-enrollment opportunities for staff to learn detailed information about the various workforce services programs. Staff can select topics that relate specifically to their role. Tier II does not have a comprehensive exam required for passing.

Completion of the modules within the Tier II program qualify for CEUs, in addition to courses, conferences, workshops and training sessions offered by workforce organizations, professionals and service providers. If not electing to utilize Tier II training offered by FloridaCommerce, a description of a local board's Tier II training program must be included as part of the LWDB LOPs.

## **6. Specialized Training**

Employees eligible for advancement within specialized workforce development roles must complete specialized training as a prerequisite for promotion. This ensures alignment and reinforces commitment to high-quality service delivery across specialized areas. Specialized training can include programs like Welfare Transition, JVSG, WIOA and Special Grants and details about specialized training must be included as part of a LWDBs LOPs.

### **a. Business Services Employees Training**

In addition to completing Tier I training and FL WINS cross training modules, new and incumbent business services employees must undergo a specialized training program to ensure they are knowledgeable of the core business services required under WIOA Section 134(d)(1)(A) and [20 CFR 678.435](#), including, but not limited to:

- i. Effective employer engagement and workforce planning
- ii. Effective Communication and outreach coordination and planning, including partnerships with local chambers and economic development organizations.
- iii. Labor market and workforce information including statewide and local demand.
- iv. Business intelligence technology
- v. Talent development pipeline and effective job candidate identification.

- 177 screening, and referral
- 178 vi. Support for workforce training including on-the-job training services,
- 179 incumbent worker training grants, quick response training grants and
- 180 services, customized training, registered apprenticeship and pre-
- 181 apprenticeship, and work-based learning.
- 182 vii. Layoff aversion and rapid response strategies
- 183 viii. Access to federal, state, and local incentives or resources, including tax
- 184 credits and bonding programs, to include those incentives focused on the
- 185 hiring of veterans.

186

187 Business services representatives should also be trained to perform outreach

188 and work directly with local industries and the business to assist them in effective

189 and efficient partnerships with their LWDBs. Business services career center

190 staff should also receive training and experience related to customized services

191 described in [20 CFR 678.435\(b\)](#), including human resources consultation,

192 compliance assistance, employee retention strategies, and other customized

193 labor market analysis.

#### 194

#### 195 **IV. IMPLEMENTATION**

#### 196

197 LWDB LOPs must include timelines for completing initial and continuing education

198 requirements, approved training types in alignment with FloridaCommerce-issued technical

199 assistance and guidance, and documentation methods. LOPs should assign roles for tracking

200 compliance and maintaining records and all training documentation. This includes training

201 documentation associated with approved alternative training consistent with directions

202 provided in Alternative Training Approval Notices provided by FloridaCommerce and

203 CareerSource Florida to ensure that all front-line and local area staff are trained, certified,

204 and prepared to serve jobseekers and employers effectively.

205

206 All workforce training provided by LWDBs to staff must align with state workforce policies and

207 technical assistance issued by CareerSource Florida and FloridaCommerce. LWDBs must

208 adhere to Workforce Policy O124 Statewide Standardization of Tools and Services in the

209 provision of training to staff to ensure alignment and consistency throughout Florida's

210 workforce system.

211

212 FloridaCommerce, in consultation with CareerSource Florida, will monitor LWDBs for both

213 programmatic and fiscal compliance. FloridaCommerce and CareerSource Florida will review

214 LOPs, verify staff credentialing and continuing education records, and assess training-related

215 expenditures. LWDBs must also evaluate and update their procedures annually based on

216 staff feedback, performance data, and changing workforce needs. These steps support

217 continuous improvement and help maintain high-quality services across Florida's LWDBs and

218 One-Stop Career Centers.

#### 219

#### 220 **V. ATTACHMENTS AND RESOURCES**

#### 221

222 [FloridaCommerce Training Materials](#)

223 [Alternate Training Approval Request Form Template](#)

224 [Training and Employment Guidance Letter \(TEGL\) No 4-15](#)



## Request for Approval of Alternative Tier I Training Program

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### Section 1: LWDB Contact Information

- **LWDB Name:** [Text Field]
  - **Title:** [Text Field]
  - **Phone:** [Text Field]
  - **Contact Person:** [Text Field]
  - **Email:** [Text Field]
  - **Date of Submission:** [Date Picker]
- 

### Section 2: Training Program Overview

- **Title of Proposed Training:** [Text Field]
  - **Training Provider:** [Text Field]
  - **Delivery Method:**
    - ☐ In-person ☐ Virtual ☐ Hybrid
  - **Total Training Hours:** [Numeric Field]
- 

### Section 3: Alignment with Tier I Requirements:

- 1. Ensure Excellent Customer Service:** Serve jobseekers and businesses with clear, respectful, and timely support—whether in person, by phone, or in writing.
- 2. Build Business Relationships:** Engage local employers, understand their needs, and coordinate outreach and support services.
- 3. Support Hiring and Job Matching:** Assist with job matching, placement, recruitment, job fairs, hiring events, and online tools.
- 4. Understand Training Options:** Explain Florida-approved training programs, including apprenticeships, internships, and work-based learning.
- 5. Apply Workforce Policies:** Understand WIOA, Florida's workforce plans, and the roles of CareerSource Florida and the State Workforce Development Board.
- 6. Prioritize Veterans and Key Populations:** Ensure priority service for veterans and other groups as required by law.
- 7. Use Labor Market Data:** Apply FloridaCommerce data to guide jobseekers and support employer decisions.
- 8. Use Technology Effectively:** Operate career center systems, case management tools, and online platforms accurately and efficiently.
- 9. Understand Performance Measures:** Know how staff actions impact state and federal performance goals.
- 10. Support Accessibility:** Ensure services are inclusive and assistive technology is used appropriately.
- 11. Follow Safety Protocols:** Apply procedures for emergencies, COOP, disaster response, and cybersecurity.
- 12. Maintain Ethical Standards:** Follow conflict-of-interest rules and act with integrity in all service areas.

- **Does the proposed alternate training program include all of the required components of the Tier 1 training program? [Yes or No]**
- 

#### **Section 4: Assessment and Certification**

- **Assessment Method:** [Multiline Text Field]
  - **Credential Awarded:** [Text Field]
- 

#### **Section 5: Attachments Checklist**

Include the following with your submission:

- ☐ Curriculum/Syllabus
  - ☐ Test Specifications
  - ☐ Evidence of Outcomes of Training (if available)
  - ☐ Other (Please describe)
- 

#### **Section 6: Certification**

I certify that the proposed training program meets or exceeds the standards of the Tier I Certification and request approval for its use as an alternative training option.

- **Authorized Representative Name:** [Text Field]
  - **Title:** [Text Field]
  - **Signature:** [Digital Signature Field or Placeholder]
  - **Date:** [Date Picker]
  
  - **CLEO Signature:** [Digital Signature Field or Placeholder]
  - **Date:** [Date Picker]
-

# CAREERSOURCE FLORIDA STAFF TRAINING AND CREDENTIALING WORKFORCE POLICY DEVELOPMENT TRACKER

## A. GENERAL INFORMATION

**Policy Name:** Workforce Policy 092 – Staff Training and Credentialing  
**Policy Type:** Operational  
**Related Policies:** [092 – One-Stop Staff Credentialing and Skills Standards](#)  
**Date to Publish:** November 14, 2025

## B. PROJECT SUMMARY

The CareerSource Florida Board of Directors sets the vision for the state workforce system under [Chapter 445.004\(2\), Florida Statutes](#), and reviews policies with FloridaCommerce for effectiveness. Local Workforce Development Boards (LWDBs) must follow [Chapter 445.007, Florida Statutes](#), and [20 CFR 679.370](#) to oversee local workforce programs and ensure staff meet credentialing standards. [Workforce Policy 092 – One-Stop Staff Credentialing and Skills Standards](#) is revised as Workforce Policy 092 – Staff Training and Credentialing to ensure all staff providing direct customer service meet minimum credentialing and training standards as established by the CareerSource Florida Board of Directors and FloridaCommerce. This revised policy provides guidance to all LWDBs to ensure staff are knowledgeable, well-trained, and capable of delivering high-quality customer service to jobseekers and employers. The policy provides a framework to ensure continuous improvement by requiring career center staff to obtain continuing education units (CEU) and for LWDBs to develop local operating procedures related to training.

CareerSource Florida and FloridaCommerce worked closely with LWDBs to refine policy goals, establish measurable outcomes, and build systems to implement and monitor progress. This policy was sent to all 21 LWDBs for consultation from October 9-October 17, 2025. CareerSource Florida received 70 comments from 11 LWDBs. A thorough review of the comments was conducted by CareerSource Florida and FloridaCommerce. 68.60% of the feedback was incorporated into the policy.

This policy applies to CareerSource Florida, FloridaCommerce, all 21 LWDBs and all regional workforce development areas.

Feedback Response Key	
Incorporated	48 (68.60%)
Future Action	12 (17.10%)
No Change	10 (14.30%)
Total	70 (100%)

## C. OVERVIEW OF CHANGES

Substantive Change	Location	Reason
LWDBs must ensure staff are trained and certified to meet standards set by CareerSource Florida and FloridaCommerce. This policy applies to all LWDBs and career centers, requiring Tier I, Tier II, and specialized training for staff. Training must include continuing education and cover key workforce topics to improve service quality and system knowledge.	Section I. Purpose and Scope (Page1)	LWDBs must train and certify staff to meet standards in Chapter 445, Florida Statutes, and 20 CFR 679.370; Training includes Tier I, Tier II, specialized programs, and continuing education to ensure quality service and system knowledge; This helps deliver consistent and effective workforce services across Florida.
<ol style="list-style-type: none"> <li>1. Require all frontline and local area staff providing direct customer service to complete FL WINS Cross Training and earn the Florida Workforce Professional Tier I certificate within 60 days of hire.</li> <li>2. Maintain ongoing professional development through annual completion of no less than 15 hours of continuing education units (CEU), approved as part of the WIOA local plan.</li> <li>3. Standardize credentialing and training requirements across all LWDBs, including LWDB-operated One-Stop Career Centers.</li> <li>4. Promote competency in customer service, communication, technology, and program-specific knowledge.</li> <li>5. Document and verify staff training and certification through consistent recordkeeping and reporting protocols.</li> </ol>	Section II., Key Objectives (Pages 1-2)	Staff must complete FL WINS Cross Training and earn the Tier I Certificate within 60 days of hire to ensure they are ready to serve customers effectively; Ongoing training through 15 CEUs each year keeps staff up to date and supports continuous improvement; Standardizing training and documenting credentials across all LWDBs ensure consistency, accountability, and high-quality service statewide.
All frontline staff must complete FL WINS Cross Training and earn the Tier I Certificate within 60 days of hire. Supervisors may require retraining if certified staff show poor performance or service issues.	Section III(a)(1) Policies and Procedures, Minimum Credentialing Standards Tier I Certificate Program, (Page 2)	Staff must complete Tier I training and FL WINS Cross Training to ensure they are ready to serve jobseekers and employers effectively; This builds a strong foundation in workforce knowledge and customer service; Retraining

Tier I training is required and leads to the Florida Certified Workforce Professional (FCWP) designation.		helps maintain service quality when performance issues arise.
LWDBs may use alternative training but it must be equal in quality and approved by CareerSource Florida and FloridaCommerce. Staff must show skills in customer service, employment services, labor exchange, workforce tools, and business engagement. They must also follow laws and policies, use assistive technology, track performance, and meet safety and ethics standards.	Section III(a)(2). Policies and Procedures, Minimum Credentialing Standards, Alternative Training (Pages 2-3)	<a href="#">20 CFR 678.430</a> ; <a href="#">20 CFR 678.435</a> ; <a href="#">20 CFR 1010</a> ; <a href="#">38 U.S.C. 4215</a>
All frontline staff must complete FL WINS training modules within 60 days of hire. This includes the Intro to FL WINS and FloridaCommerce and CSF/LWDB Essentials. These modules support staff learning and performance	Section III(a)(3), Policies and Procedures, Minimum Credentialing Standards, WIOA Partner Cross Training (Page 3)	FL WINS training helps new staff quickly learn key systems and policies so they can serve customers well; Completing these modules within 60 days ensures consistent onboarding and supports statewide workforce goals
All frontline staff must complete 15 CEUs each year to keep their Florida Certified Workforce Professional (FCWP) status; Staff can earn recognition by completing more CEUs; LWDBs must track and store CEU records and include rules for advanced training in their local procedures.	Section III(a)(4), Policies and Procedures, Minimum Credentialing Standards, Continuing Education Unit (CEU) (Pages 3-4)	Ongoing CEU requirements and advanced training recognition help workforce staff stay current, improve skills, and support consistent, high-quality service across all LWDBs.
Tier II training lets staff choose and complete training that fits their role. It is optional, self-paced, and does not require an exam. Staff earn CEUs for completing modules; LWDBs must describe their own Tier II program in local procedures if they do not use the FloridaCommerce version	Section III(a)(5), Policies and Procedures, Minimum Credentialing Standards, Tier II Program for Frontline and Local Area Staff (Page 4)	Tier II training helps staff build deeper knowledge in areas that match their job, supports ongoing learning, and earns CEUs to maintain professional development.
Staff must complete specialized training before advancing into certain workforce roles, and LWDBs must include training details in their local procedures; Business services employees must complete extra training beyond Tier I and FL WINS to meet requirements.	Section III(a)(6)(a), Policies and Procedures, Minimum Credentialing Standards, Specialized Training, Business Services Employees Training (Page 4)	Specialized training ensures business services staff meet the service standards required under WIOA Section 134(d)(1)(A) and <a href="#">20 CFR 678.435</a> including employer engagement, labor market analysis, and customized business support; This helps LWDBs deliver consistent, high-quality services to

This includes skills in employer engagement, labor market data, outreach, and customized services for businesses.		employers and strengthens local workforce partnerships.
LWDBs must include timelines, approved training types, and documentation methods in their LOPs to ensure staff are trained and certified; Training must follow FloridaCommerce and CareerSource Florida guidance to keep services consistent statewide; FloridaCommerce will monitor compliance, and LWDBs must update procedures yearly to support continuous improvement.	Section IV. Implementation	
	Section V. Attachments and Resources	<a href="#">FloridaCommerce Training Materials</a> ; Alternate Training Approval Request Form Template (Attached); <a href="#">TEGL No. 4-15</a> ; Revised Workforce Policy O124 – Statewide Standardization of Tools and Services (November 13, 2025)

[illegible]

Workforce Policy Q12 Staff Training and Credentialing	Line 20	Editor	10-24-2023 12:13:30	Maria Gordin	gordinm@floridacommunity.edu	CarrollSource Staff Center	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. I believe this should be 1 hour not 5 hours.	Comment Proposed Resolution Q12: 5A.	Language in the policy updated to clarify it is 5 hours.	
Workforce Policy Q12 Staff Training and Credentialing	Line 223	Administrative	10-24-2023 11:31:30	Maria Gordin	gordinm@floridacommunity.edu	CarrollSource Staff Center	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Should the first course be Training and Credentialing or Additional.	Comment Proposed Resolution Q12: Provide a link to the specific Florida Community College Additional.	Link to be updated in the policy before a final fix.	
Workforce Policy Q12 Staff Training and Credentialing	Line 224	Administrative	10-24-2023 11:31:30	Maria Gordin	gordinm@floridacommunity.edu	CarrollSource Staff Center	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Should there be a separate to the Additional Training Section (Section 10-20-2023)?	Comment Proposed Resolution Q12: Add the language.	Language in the policy updated to clarify a final fix.	
Workforce Policy Q12 Staff Training and Credentialing	Line 27	Substantive	10-24-2023 12:42:27	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. And Florida ABCC will be completed in 30 days.	Comment Proposed Resolution Q12: We are currently doing that representation as we are having internal processes and reviewing and looking to their new one. We are not sure if we will be allowed 60 days to complete this process.	Language in the policy updated to clarify they have 60 days to take care of the process, consistent with usual internal timelines at FloridaComm.	
Workforce Policy Q12 Staff Training and Credentialing	Line 49	Substantive	10-24-2023 17:42:40	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. How many times can the employee take this exam?	Comment Proposed Resolution Q12: It is unclear if the training will be facilitated by Florida.	Language in the policy updated to clarify it is 3 to 5 times.	
Workforce Policy Q12 Staff Training and Credentialing	Line 50	Administrative	10-24-2023 17:42:40	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Clarify required CEU requirement.	Comment Proposed Resolution Q12: We have 5 hours of CEUs and the last 111 are 15 hours of CEUs. We believe this is 100%.	Language in the policy updated to clarify it is 3 to 5 times.	
Workforce Policy Q12 Staff Training and Credentialing	Line 11	Substantive	10-24-2023 12:42:40	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: We have a training program for the website. We have a training program for the website. We have a training program for the website.	Training program requirement has been reviewed and reference to Board/Florida has been added.	
Workforce Policy Q12 Staff Training and Credentialing	Line 105	Substantive	10-24-2023 12:42:27	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: We have a training program for the website. We have a training program for the website. We have a training program for the website.	This policy applies to all full-time staff. Additional technical assistance will be provided to staff.	
Workforce Policy Q12 Staff Training and Credentialing	Line 160	Substantive	10-24-2023 12:42:27	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: We have a training program for the website. We have a training program for the website. We have a training program for the website.	No change needed. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 161	Substantive	10-24-2023 12:42:27	Anthony Bryant	abryant@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: We have a training program for the website. We have a training program for the website. We have a training program for the website.	Clarification will be provided via technical assistance to staff.	
Workforce Policy Q12 Staff Training and Credentialing	Line 151 and 100-151	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 109	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Change this citation to "within 30 days of hire."	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 49-52	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 49	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 38	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 37	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 13	Editor	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 75	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 11	Substantive	10-24-2023 15:10:20	Denise Doubinsky	ddoubinsky@floridacommunity.edu	CarrollSource Board	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear. Policy is unclear. Policy is unclear.	No change needed. This is not a requirement for the provision of staff training for other major languages. If a staff member previously passed the Test 1 training but begins to perform poorly, then a WFOC may require staff to retake the training program.	
Workforce Policy Q12 Staff Training and Credentialing	Line 27	Editor	10-23-2023 17:40:43	Gina Nienburg	gnienburg@floridacommunity.edu	CarrollSource North Florida	Notes Policy Workforce Policy Q12 Staff Training and Credentialing. Concerns with citation 1. Training program must be included in the website which Plan and on the website.	Comment Proposed Resolution Q12: Remove this citation. Policy is unclear.		



Feedback Response Key			
Incorporated (1)	Future Action (2)	No Change (3)	TOTAL
48	12	10	70
68.60%	17.10%	14.30%	100%

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

## Action Item 3

### REVISIONS TO WORKFORCE POLICY 0124 STATEWIDE STANDARDIZATION OF TOOLS AND SERVICES

Public Law 113-128, the Workforce Innovation and Opportunity Act (WIOA), is designed to help job seekers access employment, education, training and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. The Governor, the CareerSource Florida Board of Directors and the Florida Department of Commerce (FloridaCommerce) are committed to the appropriate and necessary use of federal and state workforce development funds. This commitment includes employing innovative strategies to streamline Florida's employment and training programs and provide universal access through a one-stop delivery system for employment services.

In 2021, Florida enacted the REACH Act to improve workforce development. In 2023, CareerSource Florida and FloridaCommerce worked with partners to create system-wide improvements for consistency and efficiency in areas like technology, administration, and procurement. The REACH Act requires the state board to reduce duplication and use resources efficiently. Senate Bill 240 added rules for consistent procurement and cost savings. The state board adopted **CareerSource Florida Workforce Policy 0124 - Statewide Standardization of Tools and Services** 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. Standardizing tools and resources ensure that a consistent experience for customers and staff statewide. The benefits of creating a uniform experience for job seekers and businesses include but are not limited to:

- Ease of expansion of relations with partner agencies, community-based organizations, businesses and other partners that work across multiple local workforce development areas.
- Structured and predictable delivery models that allow targeted performance analysis, troubleshooting and diagnosis, and implementation of continuous improvement models.

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state board establishes and directs the vision for the state workforce system. Federal and state law describes what items the state workforce development board (SWDB) must review,

approve, or consider, including workforce development policies. CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency. Consistent with [20 CFR 683.215\(d\)](#) and goals established in [Section 14.36, Florida Statutes](#), Workforce Policy O124 – Statewide Standardization of Tools and Services is revised to establish a unified framework for statewide standardization of tools and services and provide guidance for the use of state-procured resources. This policy combines two policies developed during workforce system transformation and reduces duplication, promotes consistent use of state procured tools or services, and provides LWDBs an option to submit a waiver for consideration if a separate tool or service has been determined to better meet local needs.

CareerSource Florida and FloridaCommerce worked closely with LWDBs to refine policy goals, establish measurable outcomes, and incorporate systems to implement and monitor progress. The policy was sent to all 21 LWDBs from September 22 to October 2, 2025, for consultation. CareerSource Florida received 12 comments from two LWDBs. A thorough review of the comments was conducted by CareerSource Florida and FloridaCommerce. 73% of the feedback was incorporated into the policy.

This policy applies to CareerSource Florida, FloridaCommerce, all 21 LWDBs and all regional workforce development areas. LWDBs shall address local strategies and their policies on procurement of tools and services in their local operating procedures.

### **FOR CONSIDERATION**

- **Approve revisions To CareerSource Florida Workforce Policy O124 - Statewide Standardization of Tools and Services.**

 <h1 style="text-align: center;">Workforce Policy</h1>		<b>POLICY NUMBER 0124</b>	
<b>Title:</b>	Statewide Standardization of Tools and Services		
<b>Program:</b>	One-Stop		
<b>Type:</b>	Operational		
<b>Effective:</b>	December 22, 2023	<b>Revised</b>	

## I. PURPOSE AND SCOPE

This policy establishes a unified framework for statewide standardization of tools and services and provides guidance for the use of state-procured resources consistent with goals established in Section 14.36, Florida Statutes, the Reimagining Education and Career Help or REACH Act, to increase alignment and efficiency of the state's workforce development system and federal law specifying that the State, Local Workforce Development Boards (LWDBs), Regions, and direct grant recipients must make efforts to reduce administrative costs by minimizing duplication by effectively using information technology to improve services.<sup>1</sup>

## II. MEASURABLE PERFORMANCE OUTCOMES

1. Statewide adoption rate of standardized tools and services
2. Reduction in duplicative technology and service expenditures
3. Increase in system-wide consistency, performance, and efficiency.

Additional measures of performance for this policy include aligned, clearly written, and publicly posted LWDB policies and procedures outlining processes for procurement of tools and services.

## III. POLICIES AND PROCEDURES

### A. The Use of State Procured or Developed Tools

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 are acquired to fulfill. 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.

When a state procured tool or service is not available, LWDBs must attempt to first

<sup>1</sup> [20 CFR 683.215\(d\)](#)

utilize common tools or services procured by a regional planning area. Regional planning areas can assist by negotiating improved rates for the LWDBs in their planning area. Prior to procuring separate solutions, LWDBs must be able to show evidence of work with the local regional planning area to provide a common tool or service at a reduced rate. A list of State procured workforce specific tools or services will be posted by CareerSource Florida, in collaboration with the Florida Department of Commerce (FloridaCommerce) to assist LWDBs.

## **B. Waiver Request Review Process**

Where tools and services are procured, acquired, or developed for implementation statewide by FloridaCommerce or CareerSource Florida, LWDBs seeking to opt out of statewide implementation or utilize a tool or service in place of the procured or acquired tool may request a waiver from FloridaCommerce and CareerSource Florida for two years or until the contract expires, whichever occurs first.

LWDBs that seek a waiver must submit a request to CareerSource Florida and FloridaCommerce using the [Standardization of Tools and Services Waiver Request Form](#). Waiver requests must include:

1. Description of existing tools/services, their functions, and business/customer groups served by them.
2. Impact on performance and measurement and management.
3. Assumptions and constraints of state-provided tools.
4. Fiscal and functional efficiencies.
5. Anticipated benefits, cost savings, economies of scale, return on investment for the local area and the state that will result if the waiver is granted.

FloridaCommerce, in consultation with CareerSource Florida, will review waiver requests and determine whether to approve the LWDB's request. FloridaCommerce will notify the LWDB of the outcome of the waiver review process on or before 15 days from the date the waiver request was received.

## **IV. IMPLEMENTATION**

Each LWDB must develop local policies and procedures in alignment with this policy and include implementation details in their four-year and two-year workforce development plans.

FloridaCommerce will monitor programmatic and fiscal compliance associated with this policy, review waiver requests and procurement plans in consultation with CareerSource Florida, and ensure alignment with WIOA, the REACH Act, and CareerSource Florida policies.

Tools and services will be reviewed six months before contract expiration to assess continued relevance.

## **V. ATTACHMENTS AND RESOURCES**

[Standardization of Tools and Services Waiver Request Form](#)

[Florida CLIFF Dashboard.](#)

# WORKFORCE POLICY DEVELOPMENT TRACKER

## STATEWIDE STANDARDIZATION OF TOOLS AND SERVICES

### TRACKING DOCUMENT

#### A. GENERAL INFORMATION

**Policy Name:** O124 Statewide Standardization of Tools and Services  
**Policy Type:** Operational

**Related Policies:** [CareerSource Florida Strategic Policy O14 / 2023.10.12.A.1 – Statewide Standardization of Tools and Services](#) (Sunset)  
[CareerSource Workforce Policy O124 – Statewide Standardization of Tools and Services](#) (Revised)

**Date to Publish:** November 14, 2025

#### B. PROJECT SUMMARY

CareerSource Florida and FloridaCommerce recommend consolidating two workforce policies—Strategic Policy 2023.10.12.A.1 – Statewide Standardization of Tools and Services and Workforce Policy O124 – Statewide Standardization of Tools and Services. These policies were developed during Workforce System Transformation. Combining them into a single, streamlined policy eliminates redundancy and simplifies guidance for local workforce development boards (LWDBs). The unified policy (O124) provides reduces duplication, promotes consistent use of state-procured tools or services, as well as providing LWDB’s an option to submit a waiver for consideration if a separate tool or service has been determined to better meet local needs.

CareerSource Florida and FloridaCommerce worked with executive directors and staff of LWDBs to align the updated policy with the law, and existing policies. Policies were sent to all 21 LWDBs for consultation feedback.

Feedback Response Key	
<b>Incorporated</b>	7 (63.6%)
<b>Future Action</b>	1 (9.1%)
<b>No Change</b>	3 (27.3%)
<b>Total</b>	11

#### C. OVERVIEW OF CHANGES

Substantive Change	Location	Reason
Revised Purpose and Scope.	Section I. Purpose and Scope (Page 1)	Establishes a unified framework to improve efficiency, reduce duplication, and align with state and federal workforce goals.

Added Measurable Performance Outcomes	Section II. Measurable Performance Outcomes (Page 1)	Requires LWDBs to justify tool choices to promote cost savings, consistency, and accountability.
Revised section on the use of state procured or developed tools.	Section III. Policies and Procedures, A. The Use of State Procured or Developed Tools (Page 1-2)	Using tools procured by the state helps LWDBs stay consistent and avoid spending funds on duplicate systems. When statewide tools aren't available, boards should work together to identify shared, lower-cost options. This leads to efficient spending and better services across Florida's workforce system.
When a state procured tool or service is not available, LWDBs must attempt to first utilize common tools or services procured by a regional planning area. Regional planning areas can assist by negotiating improved rates for the LWDBs in their planning area. Prior to procuring separate solutions, LWDBs should be able to show evidence of work with the local regional planning area to provide a common tool or service at a reduced rate.	Section III. Policies and Procedures, A. The Use of State Procured or Developed Tools (Page 1-2)	This approach promotes cost-efficiency, collaboration, and consistency across Florida's workforce system. It reduces duplication, supports smarter spending, and aligns with WIOA by encouraging shared use of resources and regional coordination.
A list of State procured workforce specific tools or services will be posted by CareerSource Florida, in collaboration with FloridaCommerce.	Section III. Policies and Procedures, A. The Use of State Procured or Developed Tools (Page 2)	This gives all LWDBs a clear and shared list of approved tools and services, supports consistency, transparency, and reduces waste by guiding boards toward tools already paid for by the state.
Waiver process for LWDBs to opt out of statewide implementation or utilize a tool or service in place of the procured or acquired tool.	Section III. Policies and Procedures, B. Waiver Request Review Process (Page 2)	LWDBs can request a waiver to use different tools than the ones chosen by the state for up to two years or until the contract ends, whichever comes first. This allows flexibility while ensuring boards follow statewide rules for the use of public funds.
Identify responsible entity and create a process for LWDB consultation prior to procurement	Section III. Policies and Procedures	This will be addressed by FloridaCommerce in technical assistance.
Revised implementation section requires LOPs in alignment with the policy. Tools and services will be reviewed six months before contract expiration to assess continued relevance.	Section IV. Implementation (Page 2)	Requires local alignment with state policy and regular review of tools for continued relevance. This ensures statewide consistency, accountability, and timely updates to tools and services, helping the system stay efficient and aligned with state and federal goals.

Policy/Template	Line	Type of Comment	Submission Date	Name	Title	Email	Local Workforce Development Board	Comment Entry	Recommended Resolution	Action Taken
Q228 Statewide Standardization of Tools and Services	Lines 34-38	Substantive	01-03-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number Q224, Type of Comment (see direction) Substantive, Comment (Comment with citation) Line 36-38: No comment is regarding the "encouragement" for regional procurement. The policy states that they are encouraged but that they go on to state the requirement to show evidence of regional procurement. Such language is regional may be an off-invoice procurement cycle and agreement cycle for the tools and services. Examples may include virtual reality headsets, Single Audit procurement, QSO, provider services, etc. All boards are not covered in their agreement and procurement cycle for tools and services and may have different levels of needs.	Comment (Proposed Resolution Q261): If the Board are "encouraged" to procure regionally there should not be a requirement to show documentation of regional work before independent procurement.	This feedback was reviewed and incorporated in part into the draft policy. Language was inserted into this policy to clarify that LMOs must first attempt to procure through regional planning areas before procuring a separate solution for future overhead and increase standardization and ensure procurement for the state for these activities.
Q228 Statewide Standardization of Tools and Services	Line 123	Substantive	01-02-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 123, Type of Comment (see direction) Substantive, Comment (Comment with citation) I would recommend the definition of tools and services being expanded based on this policy, this can be interpreted broadly, these the examples accounting systems, IT systems, phone services, etc.?	Comment (Proposed Resolution Q261): Provide a clear definition on what tools and services are included in this policy.	This feedback was reviewed and incorporated in part into the draft policy. Language was inserted into this policy to clarify that CenterSource Florida, in collaboration with Florida's economic, will publish such a list.
Q228 Statewide Standardization of Tools and Services	Lines 42-44	Substantive	01-03-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 123, Type of Comment (see direction) Substantive, Comment (Comment with citation) Line 42-44: Waiver Request Process? The Statement, "these tools and services are provided, acquired or developed for implementation Q2 protocols, LMOs, waiting to get out of statewide implementation or utilize a tool or service in place of the procurement tool... must request a waiver from Florida's economic and CenterSource Florida." needs that it is a requirement for Board to use a tool or service provided by the state and this must not stop... "having to complete a Waiver request to not use a service, creates additional administration such as the Board. An example of this would be the CenterSource labor market software procurement, based on this language in the policy if Board could not use the service, they would have to complete a waiver request to not use it.	Comment (Proposed Resolution Q261): Recommended removing this language and/or include the waiver request when a Board opts to use an alternative tool or service.	The feedback was reviewed and incorporated in part into the draft policy. Language was inserted into this policy to clarify that LMOs must first attempt to procure through regional planning areas before procuring a separate solution for future overhead and increase standardization and ensure procurement for the state for these activities.
Q228 Statewide Standardization of Tools and Services		Substantive	01-04-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number Q224, Type of Comment (see direction) Substantive, Comment (Comment with citation) implementation.	Comment (Proposed Resolution Q261): There needs to be something in the policy that allows Boards to continue with their current agreements and not have to move to the state that procurement.	This feedback was reviewed and incorporated into this policy language was added to allow LMOs to continue with current agreements and they opt.
Q228 Statewide Standardization of Tools and Services		Substantive	01-05-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number Q224, Type of Comment (see direction) Substantive, Comment (Comment with citation) in the procurement requirement only for vendors that require ability settings with forms/ERP and competitive bids?	Comment (Proposed Resolution Q261): Provide clarification on the procurement tool for regional procurement.	This feedback was reviewed and incorporated in part into the draft policy. Language was inserted into this policy to clarify that LMOs must first attempt to procure through regional planning areas before procuring a separate solution for future overhead and increase standardization and ensure procurement for the state for these activities.
Q228 Statewide Standardization of Tools and Services	Line 123	Substantive	01-06-2025 10:02:06	Christine Whitney	Senior Director of Economic Development	cwhit@camerascources.com	CenterSource Southeast	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 123, Type of Comment (see direction) Substantive, Comment (Comment with citation) Will there be a database or portal where LMOs can access state provided tools and services?	Comment (Proposed Resolution Q261): Recommended providing accessible portal to review all services and tools available from the state procurement.	This feedback was reviewed and incorporated in part into the draft policy. Language was inserted into this policy to clarify that LMOs must first attempt to procure through regional planning areas before procuring a separate solution for future overhead and increase standardization and ensure procurement for the state for these activities.
Q228 Statewide Standardization of Tools and Services	Line 38	Critical	01/2/2025 10:37	Gina Romberg	VP Workforce Operations	gromberg@camerascources.com	CenterSource Central Florida	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 38, Type of Comment (see direction) Critical, Comment (Comment with citation) Line 38 - Clarification of Procurement Authority. The policy does not specify which entity (CenterSource Florida or Florida's economic) is responsible for procuring state-level tools. Without clarity, LMOs lack a channel to provide input on local needs.	Comment (Proposed Resolution Q261): Explicitly identify the responsible entity and create a process for LMO consultation before procurement.	This feedback was reviewed and will be addressed by the Department of the state and subsequent review of all state-provided tools for CenterSource Florida and Florida.
Q228 Statewide Standardization of Tools and Services	Line 38	Critical	01/2/2025 10:37	Gina Romberg	VP Workforce Operations	gromberg@camerascources.com	CenterSource Central Florida	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 38, Type of Comment (see direction) Critical, Comment (Comment with citation) Line 38 - Transparency of State Procurement Tools. LMOs currently have no systematic way to know which tools are state-provided. This creates risk of non-compliance and duplication.	Comment (Proposed Resolution Q261): Establish a publicly available website that lists all state-provided tools and services, with functionality for updates and help.	This feedback was reviewed and will be addressed by the Department of the state and subsequent review of all state-provided tools for CenterSource Florida and Florida.
Q228 Statewide Standardization of Tools and Services	Lines 30-32	Critical	01/6/2025 10:37	Gina Romberg	VP Workforce Operations	gromberg@camerascources.com	CenterSource Central Florida	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 30, Type of Comment (see direction) Critical, Comment (Comment with citation) Line 30-32 - Restrictions on Local Procurement. The stated prohibition on LMOs using bank for tools deemed "digital" is overly rigid. For example, CAC uses Lightcast labor market analytics, which provides local, real-time data not matched by any other tool. This policy could require LMOs of region-specific solutions available for local employer requirements.	Comment (Proposed Resolution Q261): Require state tools as a baseline, but allow LMOs to procure supplemental, non-duplicative tools without a waiver. Waivers should apply only in cases of true duplication.	This directly affected the policy (non-duplicative tools) and was addressed.
Q228 Statewide Standardization of Tools and Services	Line 61	Critical	01/6/2025 10:37	Gina Romberg	VP Workforce Operations	gromberg@camerascources.com	CenterSource Central Florida	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 61, Type of Comment (see direction) Critical, Comment (Comment with citation) Line 61 - Waiver Request Timeline. A 30-day waiver request period is impractical for workforce operations where responsiveness is key. Local providers often need solutions faster than a month.	Comment (Proposed Resolution Q261): Recommendation: Shorten the waiver request period to 15 days, especially when the LMO can demonstrate cost savings or similar requirements.	Review review timeline related (and confirmed) to be within 15 days.
Q228 Statewide Standardization of Tools and Services	Line 28-29	Substantive	01/6/2025 10:37	Gina Romberg	VP Workforce Operations	gromberg@camerascources.com	CenterSource Central Florida	Select Policy Q228 Standardization of Tools and Services, Policy Line Number 28, Type of Comment (see direction) Substantive, Comment (Comment with citation) Emergency Purchases (Line 28,29 context). The policy does not address documented emergency purchases when state tools are not yet available, with post-hoc notification to CAC.	Comment (Proposed Resolution Q261): Recommendation: Allow LMOs to make documented emergency purchases when state tools are not yet available, with post-hoc notification to CAC.	This policy only applies if there is a state tool available. No change is needed.



Feedback Response Key			
Incorporated	Future Action	No change	TOTAL
8	1	2	11
72.70%	9.10%	18.20%	100%

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

## Action Item 4

### REVISIONS TO CAREERSOURCE FLORIDA WORKFORCE POLICY P95 – WIOA YOUTH PROGRAM ELIGIBILITY AND SERVICE PROVIDER SELECTION

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state board establishes and directs the vision for the state workforce system. Federal and state law describes what items the state workforce development board (SWDB) must review, approve, or consider, including workforce development policies. CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency.

Addressing the needs of youth with barriers to employment is a critical component of the state's workforce strategy. Proactive and responsive partnerships are essential in the coordination of training and support towards high-quality employment outcomes that improve self-sufficiency and align with the workforce needs of Florida's business community. CareerSource Florida and FloridaCommerce reviewed **Workforce Policy P95 – Youth Eligibility and Workforce Policy P120 – Youth Service Provider Selection** and recommend combining these policies into a single workforce policy. Consistent with [Chapter 445, Florida Statutes](#) and [20 CFR 681](#), the revised Workforce Policy P95 – Workforce Innovation and Opportunity Act (WIOA) Youth Program Eligibility and Service Provider Selection include guidance on eligibility, enrollment, use of federal funds to provide food, beverage or dining activities for youth, and how service providers are selected. This workforce policy removes outdated information and simplifies processes.

CareerSource Florida and FloridaCommerce worked closely with Local Workforce Development Boards (LWDBs) to refine policy goals, establish measurable outcomes, and build systems to implement and monitor progress. The policy went out to all 21 LWDBs for consultation from September 22 to October 2, 2025. CareerSource Florida received 14 comments from eight LWDBs. A thorough review of the comments was conducted by CareerSource Florida and FloridaCommerce. 42.90% of the feedback was incorporated into the policy.

This policy applies to CareerSource Florida, FloridaCommerce, all 21 LWDBs and all regional workforce development areas. LWDBs must implement local policies, procedures, and monitoring that define the roles of staff, youth providers, employers and participants.

## **FOR CONSIDERATION**

- **Approve revisions to CareerSource Florida Workforce Policy P95 – WIOA Youth Program Eligibility and Service Provider Selection.**



**POLICY  
NUMBER**

**P95**

## **Workforce Policy**

<b>Title:</b>	WIOA Youth Program Eligibility and Service Provider Selection		
<b>Type:</b>	Programmatic		
<b>Program:</b>	Workforce Innovation and Opportunity Act - Youth		
<b>Effective:</b>	04/25/2017	<b>Revised:</b>	01/06/2022

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

Addressing the needs of youth with barriers to employment is a critical component of the state's workforce system. Proactive and responsive partnerships are essential in the coordination of training and support towards high-quality employment outcomes that improve self-sufficiency and align with the workforce needs of Florida's business community. This policy is designed to provide guidance to Local Workforce Development Boards (LWDBs) on the development of aligned and effective youth programs that ensure high quality outcomes in alignment with state<sup>1</sup> and federal law.<sup>2</sup>

### **II. KEY OBJECTIVES AND MEASURABLE PERFORMANCE OUTCOMES**

#### **A. Key Objectives**

1. Improve in-demand employment and training outcomes by ensuring high quality and cost-effective youth service providers aligned with the needs of Florida businesses.
2. Promote skill development through training that leads to recognized credentials and prepares youth for work within in-demand industries.
3. Expand timely access to youth services for both out-of-school and in-school youth, including those with disabilities.
4. Strengthen partnerships by working with required and additional partners, including local businesses and community partners.
5. Ensure compliance with federal and state procurement requirements for WIOA youth service providers.
6. Ensure compliance and accountability by tracking performance.

#### **B. Measurable Performance Outcomes**

<sup>1</sup>[Chapter 445, F.S.](#)

<sup>2</sup>[20 CFR 681](#)

Performance for this policy will be measured by, at minimum, the following:

1. The six primary WIOA performance indicators for the Youth program as defined in Section 116(b)(2)(A)(ii) and [34 CFR 463.155\(c\)](#) and [20 CFR 677.155](#), and
2. Performance outcome metrics outlined in Workforce Policy 9, Availability of Services to Floridians, for the applicable population.
3. Number of program youth placed in apprenticeship or pre-apprenticeship programs.

### III. POLICIES AND PROCEDURES

#### A. WIOA Youth Eligibility Criteria

LWDBs must actively pursue outreach to potentially eligible youth and ensure that youth enrolled in the WIOA Youth Program meet eligibility criteria as defined in WIOA Sections 129(a)(1) and, [20 CFR 681.200 - 681.220](#). Additionally, LWDB procedures and local policies for youth outreach, eligibility determinations, enrollment, and procurement must be in alignment with technical assistance and guidance issued by FloridaCommerce. Consistent with the relevant Technical Assistance Letter issued by FloridaCommerce, eligibility determinations are based, in part, on the following factors:

- Eligibility criteria as an out-of-school youth (OSY) or in-school youth (ISY)
- School status determination
- Identified barrier(s)<sup>3</sup>

LWDBs must ensure, in alignment with [Workforce Policy 100: Work-Based Training and Work Based Learning Opportunities](#), that education and local youth-focused workforce development systems are coordinated and designed to increase and expand pathways into work-based learning activities, especially registered apprenticeships and preapprenticeship programs, that meet current industry needs. Programs should be designed to efficiently assist youth into, and persist in, high-wage, high-demand, and high-skilled occupations and provide access to an aligned and expanding array of apprenticeship and preapprenticeship options. Programs for youth should be focused on demonstrated industry need, career-relevant training, and increasing in-demand employment outcomes. Youth program participant data on pre-apprenticeship and apprenticeship enrollment, outreach, and completion should be regularly measured, tracked, and shared.

#### B. Enrollment and Assessment

Youth can self-register in Employ Florida, however they cannot self-enroll in a WIOA Youth program. LWDB staff must ensure that youth are registered in Employ Florida and determine eligibility as quickly as possible and before enrollment. The enrollment process includes eligibility determination, objective assessment, development of an Individual Service Strategy (ISS), and participation in any of the 14 WIOA Youth program elements outlined in 20 CFR 681.460. Once an individual is determined to be eligible for the WIOA Youth program, staff are required to

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<sup>3</sup> WIOA Section 129(a)(1)(B)(iii) for OSY or Section 129(a)(1)(C)(iv) for ISY

complete a WIOA Youth program application in Employ Florida.

Objective assessments evaluate academic and skill levels, career readiness, and service needs. Assessments may include formal tests, interviews, observations, or file reviews, and must accommodate youth with disabilities. Assessments from other programs completed within the past six months may be used. Youth are considered participants only after receiving one of the 14 program elements listed in [20 CFR 681.460](#).

The ISS must be tailored to the youth's needs and include assessment results and education and employment goals aligned with career pathways that are designed to lead to employment within in-demand industry sectors. It must align with at least one WIOA performance indicator and include at least one of the 14 program elements. Existing ISS documents from other programs may be used if completed within the past six months and sufficient to meet WIOA requirements.

Staff must complete the objective assessment and ISS using the state-identified tool listed in the applicable Technical Assistance Letter issued by FloridaCommerce.

Co-enrollment in WIOA programs is highly encouraged and depends on each program's eligibility, individual service needs, and career readiness, determined through assessments of skills, work experience, literacy, and support needs. Youth aged 18 to 24 may be co-enrolled in the WIOA Youth and Adult programs if they meet eligibility for both. Youth may qualify for WIOA adult services if they meet WIOA Adult eligibility requirements and need intensive youth services as well as adult training related to their career pathway. For co-enrolled participants, staff must determine the appropriate services from each program, identify the funding stream for each service in Employ Florida, and ensure services are not duplicated consistent with applicable state and federal law. LWDBs must ensure that services for non-eligible youth are funded through partner programs.

LWDBs should work closely with local businesses, as well as community and WIOA partners, to serve youth.

**C. Use of Federal Funds to Provide Food, Beverage, or Dining Activities**

LWDBs may use state and WIOA funds to provide food and beverages for youth enrolled and participating in youth workforce programs provided that such expenditures adhere to technical assistance and guidance issued by FloridaCommerce.

**D. WIOA Youth Service Provider Selection and Procurement**

LWDBs may deliver youth services directly or award grants and contracts through a competitive procurement process, as required by WIOA Section 123. Direct provision must be cost-effective and comply with governance standards in [Workforce Policy G110 – Local Workforce Development Area Board Governance](#).

Selection through procurement and the execution of contractual arrangements must include specific and measurable deliverables designed to drive the effective, efficient, and aligned delivery of services, include outreach and partnership objectives, and be consistent with issued technical assistance and guidance from FloridaCommerce.

Selected providers must, at minimum:

- demonstrate the ability to offer all 14 required program elements,
- coordinate with community partners,
- offer services at a reasonable cost with a clear budget,
- show knowledge of WIOA requirements,
- have strong community and business linkages.
- meet or exceed LWDB performance indicators,
- comply with reporting requirements,
- be legally established for at least six months,
- hold a current business license,
- disclose any pending legal actions, and
- must not have been found at fault in criminal, civil, or administrative proceedings.

LWDBs may establish additional criteria in their local plans.

#### IV. IMPLEMENTATION

LWDBs must implement local policies, procedures, and monitoring that define the roles of staff, youth providers, employers, and participants. LOPs must ensure proper oversight of eligibility determinations, enrollment, and service delivery and be designed to meet or exceed state and federal performance metrics. LOPs must address the use of funds for food and drink costs for youth and ensure costs do not exceed allowed limits. Youth providers are required to cooperate fully with monitoring activities and follow all applicable regulations. Monitoring must verify compliance with WIOA, 2 CFR Part 200, issued agency guidance and technical assistance, and state policy. If an LWDB also serves as a youth provider, monitoring must be conducted by an external entity. Results must be reported to the Chief Local Elected Official (CLEO).

LWDBs must include in their local policies and procedures, in compliance with § 681.420, ensure appropriate links to entities that will foster the participation of eligible local youth. Such links may include connections to:

- 1) Local area justice and law enforcement officials;
- 2) Local public housing authorities;
- 3) Local education agencies;
- 4) Local human services agencies;
- 5) WIOA title II adult education providers;
  - a. Local disability-serving agencies and providers and health and mental health providers;
- 6) Job Corps representatives; and
  - a. Representatives of other area youth initiatives and including those that serve homeless youth and other public and private youth initiatives.

In accordance with 63T-1.005, Florida Administrative Code (F.A.C.), LWDBs shall include in their local policies and procedures defined staff who will participate in the Community Reentry Team (CRT) to review DJJ youth returning from residential commitment, ensuring they receive appropriate workforce transition services to facilitate their reentry into the community.

FloridaCommerce conducts regular monitoring of each LWDB. This includes reviewing eligibility documentation, evaluating Individual Service Strategies (ISS), assessing procurement practices, and measuring service outcomes.

## **V. ATTACHMENTS AND RESOURCES**

[WIOA Youth Fact Sheet](#)



# WORKFORCE POLICY DEVELOPMENT TRACKER

## WIOA YOUTH PROGRAM ELIGIBILITY AND SERVICE PROVIDER SELECTION

### A. GENERAL INFORMATION

**Policy Name:** P95 – WIOA Youth Program Eligibility and Service Provider Selection

**Policy Type:** Programmatic

**Related Policies:** [Workforce Policy P95 – Youth Eligibility](#)

[Workforce Policy P120 – Youth Service Provider Selection \(Sunset\)](#)

[Workforce Policy P71 – Final Guidance Food and Beverage for WIA Youth \(Sunset\)](#)

**Date to Publish:** November 14, 2025

### B. PROJECT SUMMARY

CareerSource Florida and FloridaCommerce merged two workforce policies—P95 - Youth Eligibility and P120 - Youth Service Provider Selection—into one streamlined policy: Revised Workforce Policy P95 – WIOA youth Program Eligibility and Service Provider Selection. This new policy removes outdated references and combines eligibility, enrollment, and procurement guidance into a single, clearer framework.

The updated policy focuses on helping youth with barriers to employment. It sets clear rules for selecting service providers and ensures programs meet legal standards. It also promotes strong partnerships and better outcomes for youth through aligned, accountable services. This workforce policy promotes proactive partnerships and coordinates support to help these youth achieve high-quality employment outcomes that foster self-sufficiency and meet the needs of Florida’s business community. The policy provides guidance to LWDBs on creating effective, aligned youth programs that comply with state and federal laws.

CareerSource Florida and FloridaCommerce worked with executive directors and staff of LWDBs to align the updated policy with the law, and existing policies. Policies were sent to all 21 LWDBs for consultation feedback.

Feedback Response Key	
<b>Incorporated</b>	6 (42.9%)
<b>Future Action</b>	3 (21.4%)
<b>No Change</b>	5 (35.7%)
<b>Total</b>	14

## C. OVERVIEW OF CHANGES

Substantive Change	Location	Reason
Updated Purpose and Scope to align WIOA youth Program Eligibility requirements and Service Provider Selection Requirements.	Section I. Purpose and Scope (Page 1)	Clarifies program goals and legal alignment. Prioritizes youth with barriers and promotes partnerships to improve employment outcomes and meet WIOA and state performance goals.
Key Objectives added.	Section II. Key Objectives and Measurable Performance Outcomes, A. Key Objectives (Page 1)	Adds six objectives to improve youth outcomes, ensure provider quality, expand access, and strengthen accountability. Aligns with labor market needs and WIOA compliance.
Measurable performance outcomes added.	Section II. Key Objectives and Measurable Performance Outcomes, B. Measurable Performance Outcomes (Page 2)	Adds WIOA indicators, Policy 9 metrics, and apprenticeship placements to track performance. Ensures accountability and alignment with workforce needs.
Policies and Procedures combined WIOA Youth Eligibility Criteria, Enrollment and Assessment, WIOA Youth Service Provider Selection and Procurement.	Section III. Policies and Procedures (Pages 2-4)	Simplifies and clarifies policy elements. Eliminates the need for multiple strategic and operational board-approved policies.
Youth eligibility criteria.	Section III. Policies and Procedures, Section A. WIOA Youth Eligibility Criteria (Page 2)	LWDBs must ensure youth meet eligibility under WIOA Section 129(a)(1) and <a href="#">20 CFR 681.200–681.220</a> , using outreach and local procedures aligned with FloridaCommerce guidance. Eligibility is based on school status, barriers to employment, and classification as in-school or out-of-school youth.
Enrollment and Assessment Section clarify regulations on Youth enrollment.	Section III. Policies and Procedures, Section B. Enrollment and Assessment (Page 2-3)	Youth can self-register in Employ Florida, but they cannot enroll themselves in a WIOA Youth program. Only LWDB staff can determine if a youth is eligible and complete the enrollment process. It is important that LWDB staff register youth in Employ Florida quickly and verify eligibility before enrollment. This ensures programs follow federal rules under WIOA Section 129(a)(1) and <a href="#">20 CFR 681.200–681.220</a> and helps youth get timely access to services that support employment and self-sufficiency.

WIOA Youth Application	Section III. Policies and Procedures, Section B. Enrollment and Assessment (Page 3)	To enroll youth in the WIOA program, staff will continue to use the WIOA application in Employ Florida. This policy does not change the mechanism for enrolling/determining eligibility for youth services. This will be reviewed in technical assistance provided by FloridaCommerce.
Clarification for how to key the ISS into Employ Florida for Youth.	Section III. Policies and Procedures, Section B. Enrollment and Assessment (Page 3)	This issue is being reviewed for resolution. Additional technical assistance will be provided by Florida Commerce.
Staff must complete the objective assessment and ISS using the state-identified tool listed in the applicable Technical Assistance Letter issued by FloridaCommerce	Section III. Policies and Procedures, Section B. Enrollment and Assessment (Page 3)	The objective assessment and ISS will continue to be completed using the Objective Assessment Summary Wizard and the Individual Service Strategy Wizard within Employ Florida. This will be reviewed in Technical Assistance.
The ISS must be tailored to the youth's needs and include assessment results and education and employment goals aligned with career pathways that are designed to lead to employment within in-demand industry sectors. It must align with at least one WIOA performance indicator and include at least one of the 14 program elements.	Section III. Policies and Procedures, Section B. Enrollment and Assessment (Page 3)	The ISS is required to include at least one of the 14 WIOA youth program elements and align with at least one WIOA performance indicator. This ensures youth receive services that match their needs and lead to jobs in high-demand industries, supporting both individual success and workforce system goals under <a href="#">20 CFR 681.460</a> and WIOA Section 129(a)(1).
Guidance on use of federal funds to provide food, beverage or dining activities to youth originally described in Final Guidance, Food and Beverage for WIA Youth (DEO Final Guidance-071 dated May 7, 2012) added.	Section III. Policies and Procedures, Section C, Use of Federal Funds to Provide Food, Beverage, or Dining Activities.	This guidance helps workforce programs stay within legal spending limits described in Ch. 112.061(6)(b), F.S. when using public funds for youth meals, ensures food costs follow Florida's per diem rates, and requires boards to document any exceptions. Local procedures must be in place to control costs and support compliance.
This section adds information and guidance from Workforce Policy P120 – Youth Service Provider Selection into this single, leaner policy on WIOA Youth Program Eligibility and Service Provider Selection.	Section III. Policies and Procedures, Section D. WIOA Youth Service Provider Selection and Procurement (Page 4)	LWDBs must either deliver youth services directly or select providers through a competitive process under WIOA Section 123, ensuring cost-effectiveness and alignment with Workforce Policy 110. Additional information will be provided through technical assistance issued by FloridaCommerce.
Selected providers must, at minimum, demonstrate the	Section III. Policies and Procedures, Section D. WIOA	In accordance with <a href="#">20 CFR 681.460</a> , LWDBs must offer all 14 program elements. Additional

ability to offer all 14 required program elements.	Youth Provider Selection and Procurement (Page 4)	information will be provided through technical assistance issued by FloridaCommerce.
LWDBs must implement local policies, procedures, and monitoring processes that define the roles of staff, youth providers, employers, participants, and procedures for the use of federal funds to provide food, beverage, or dining activities.	Section IV. Implementation (Page 4-5)	Requires LOPs and monitoring to ensure compliance with WIOA and 2 CFR. Defines roles, supports oversight, and mandates external review when LWDBs serve as providers
LWDBs are required to establish policies that connect eligible youth to a broad network of community partners—including justice officials, education and housing agencies, health providers, and youth-serving organizations. These policies must designate staff to participate in Community Reentry Teams (CRTs) to support youth returning from residential commitment through coordinated workforce transition services.	Section IV. Implementation (Page 4-5)	These requirements ensure youth—especially those facing barriers such as homelessness, justice involvement, or disabilities—receive comprehensive support that integrates education, employment, and social services. By fostering collaboration across systems, LWDBs help create pathways to meaningful careers and reduce recidivism, aligning with the goals of WIOA to improve long-term employment outcomes for vulnerable youth populations.
WIOA Youth Fact Sheet provided as guidance.	Section V. Attachments and Resources (Page 5)	

[illegible]

Future Workforce			
Incorporated	Future Action	No change	TOTAL
6	3	5	14
42.86%	21.43%	35.71%	100%

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

## Action Item 5

### REVISIONS TO CAREERSOURCE FLORIDA WORKFORCE POLICY P111 – SERVICES FOR VETERANS, MEMBERS OF THE MILITARY, AND SPOUSES

The CareerSource Florida Board of Directors serves as the principal workforce policy organization for the state as described in [Chapter 445.004\(2\), Florida Statutes](#). The state board establishes and directs the vision for the state workforce system. Federal and state law describes what items the state workforce development board (SWDB) must review, approve, or consider, including workforce development policies. CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) review policies for effectiveness and efficiency.

CareerSource Florida and FloridaCommerce reviewed the six (6) workforce policies below related to workforce programs that serve veterans, military, and spouses.

1. [Workforce Policy P102](#) - Veteran Intake at Career Centers
2. [Workforce Policy P103](#) - Local Veteran Employment Representative & Disabled Veteran Outreach Program
3. [Workforce Policy P111](#) - Priority of Service for Veterans and Eligible Spouses
4. [Workforce Policy P112](#) - Staffing Requirements (VETS)
5. [Workforce Policy P117](#) - Employment and Advocacy (VETS)
6. [Workforce Policy P119](#) - Consolidated Position Operational Requirements (VETS)

CareerSource Florida and FloridaCommerce recommend eliminating five of these policies and consolidating them into the revised **Workforce Policy P111 – Services for Veterans, Members of the Military, and Spouses**. This single policy reaffirms Florida's commitment to being the nation's most military friendly state through the provision of high quality and responsive workforce programs, resources, and opportunities that strengthen the state's workforce and economy. Its purpose is to ensure that veterans, military service members, and their families receive prioritized access to high quality workforce services and responsive, tailored support that not only maximizes their unique talents and skills but promotes skill development and employment.

This policy establishes the minimum requirements for Local Workforce Development Boards (LWDBs) to implement effective procedures and ensure priority, high quality workforce service and support for transitioning service members and veterans, as well as their spouses and dependents. The Policy applies to all U.S. Department of Labor

(DOL) funded programs including Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser, including the Military Family Employment Advocacy program, Jobs for Veterans State Grant (JVSG), Trade Adjustment Assistance (TAA), and Migrant and Seasonal Farm Worker (MSFW).


CareerSource Florida and FloridaCommerce worked with subject-matter experts from LWDBs to consolidate these policies into the single Workforce Policy P111 – Services for Veterans, Members of the Military, and Spouses. The policy was sent to all 21 LWDBs for consultation from September 22 to October 2, 2025. CareerSource Florida received 14 comments from eight LWDBs. A thorough review of the comments was conducted by CareerSource Florida and FloridaCommerce. 42.90% of feedback was incorporated into the policy. To ensure a high level of service and promote better case management and support, technical assistance will be developed by FloridaCommerce in consultation with CareerSource Florida and will be issued to LWDBs.

This policy applies to CareerSource Florida, FloridaCommerce, all 21 LWDBs and all regional workforce development areas. LWDBs shall develop local strategies and policies on services for veterans, members of the military, and spouses.

### **FOR CONSIDERATION**

- **Approve revisions to CareerSource Florida Workforce Policy P111 – Services for Veterans, Members of the Military, and Spouses.**



 <h2 style="text-align: center;">Workforce Policy</h2>		<b>POLICY NUMBER</b>  <b>P111</b>	
<b>Title:</b>	Services For Veterans, Members of the Military, and Spouses		
<b>Program:</b>	Workforce Innovation and Opportunity Act, Wagner-Peyser, Trade Adjustment Assistance, Migrant and Seasonal Farmworker Program, Jobs for Veterans State Grant, National Dislocated Worker Grants		
<b>Type:</b>	Programmatic		
<b>Effective:</b>		<b>Revised</b>	

### I. PURPOSE AND SCOPE

This policy reaffirms Florida's commitment to being the nation's most military friendly state through the provision of high quality and responsive workforce programs, resources, and opportunities that strengthen the state's workforce and economy. Its purpose is to ensure that veterans, military service members, and their families receive prioritized access to high quality workforce services and responsive, tailored support that not only maximizes their unique talents and skills but promotes skill development and employment.

This policy establishes the minimum requirements for Local Workforce Development Boards (LWDBs) to implement effective procedures and ensure priority, high quality workforce service and support for transitioning service members and veterans, as well as their spouses and dependents. The Policy applies to all U.S. Department of Labor (DOL) funded programs including Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser, including the Military Family Employment Advocacy program, Jobs for Veterans State Grant (JVSG), Trade Adjustment Assistance (TAA), and Migrant and Seasonal Farm Worker (MSFW).

### II. MEASURABLE PERFORMANCE OUTCOMES

1. Number and percentage of eligible persons served.
2. Time to service and evidence of provision of information on priority of service for veterans; and
3. Federal indicator data and state letter grade metrics specific to the applicable population.

Additional measures of performance for this policy include aligned, clearly written, and publicly posted Local Operating Procedures (LOPs) outlining processes to implement this policy.

### III. POLICIES AND PROCEDURES

#### A. Priority of Service<sup>1</sup>

Veterans and eligible spouses (“covered persons”) must receive priority of service for all USDOL-funded job training programs, which include WIOA programs.<sup>2</sup>

Service must be provided by appropriately qualified staff, consistent with issued federal guidance<sup>3</sup> and Florida Department of Commerce (FloridaCommerce) technical assistance, as soon as possible and in alignment with [Workforce Policy 9, Availability of Services to Floridians](#).

##### 1. Intake Procedures

LWDBs must implement standardized intake processes to identify and provide priority service to veterans and eligible spouses.

###### a. Identification at Entry:

- Staff must ask if individuals or their spouses have served in the U.S. military.
- Electronic kiosks must allow self-identification.
- Prominent signage must encourage self-identification.
- Employ Florida must be used to verify veteran status (flag icon).

###### b. Screening for Enhanced Services:

- Intake must be conducted by non-JVSG staff trained in career center services.
- Eligibility must be determined consistent with requirements in Training and Employment Guidance Letter (TEGL) 03-24 and FloridaCommerce Technical Assistance Letter 25-01<sup>4</sup>.
- Eligible individuals must be referred immediately to DVOP specialists. If the individual declines DVOP services, a proper case note must be recorded in Employ Florida indicating that the eligible person is declining DVOP services.
- If the DVOP specialist is unavailable, services must be provided by the next qualified staff member without delay. Additionally, a DVOP referral must be made and the DVOP Specialist has up to two business days to connect with the eligible person.

##### 2. Eligibility for Priority of Service

Covered persons must first meet the program’s eligibility and any statutory priority criteria to receive priority for participation in the program and receipt of services (i.e., WIOA Adult). Consideration of eligibility for WIOA must be documented.

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<sup>1</sup> [20 CFR 680.650](#).

<sup>2</sup> Priority for veterans and eligible spouses follows other statutory priorities, such as those applied to participants funded through local WIOA Adult funds. See [Workforce Policy 105](#).

<sup>3</sup> [TEGL 10-09](#)

<sup>4</sup> Screening questions are included in Employ Florida and may be reviewed in the DVOP Eligibility Screening Tool developed by the National Veterans Training Institute (NVTI).

Covered persons, for purpose of the provision of priority of services, are defined as follows:

- a. **Veteran:** A person who served at least one day in the active military, naval, or air service, and who was discharged or released under conditions other than dishonorable, as specified in 38 U.S.C 101(2). Active service includes full-time Federal service in the National Guard or a Reserve component. It does not include full-time duty performed strictly for training purposes, nor does it include full-time active duty performed by National Guard personnel who are mobilized by state rather than federal authorities.
- b. **Eligible Spouse:** The spouse of:
  - i. A veteran who died of a service-connected disability.<sup>5</sup>
  - ii. A member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
    - (1) Missing in action.
    - (2) Captured in the line of duty by a hostile force.
    - (3) Forcibly detained or interned in the line of duty by a foreign government or power.
    - (4) A veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or
    - (5) A veteran who died while a total, service- connected disability was in existence.

## **B. Jobs for Veterans State Grant Program**

The JVSG program<sup>6</sup> provides staffing to LWDBs to provide enhanced services that prepare veterans, eligible spouses, and other eligible persons for meaningful careers through Disabled Veterans Outreach Program (DVOP) specialists and conducts focused outreach and advocacy for veterans and eligible spouses with local employers through Local Veterans' Employment Representatives (LVERs). Each LWDB must integrate JVSG-funded staff into its one-stop system as part of a comprehensive team that provides services to veterans and eligible persons to address their employment and training needs.

LWDBs must follow technical guidance issued by FloridaCommerce regarding eligibility for enhanced services provided by DVOP specialists and operational guidance for DVOP specialists and LVERs.

## **C. Staffing**

Staffing for positions performing required duties as outlined in this policy is funded through multiple means, including, but not limited to the following:

- JVSG
- Military Family Employment Advocate Program<sup>7</sup>

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<sup>5</sup> A service-connected death means that the death resulted from a disability incurred or aggravated in the line of duty in active military service.

<sup>6</sup> See [38 USC Chapters 41 and 42](#), and [20 CFR 1001](#).

<sup>7</sup> [Chapter 445 Section 055 - 2024 Florida Statutes - The Florida Senate](#)

- Other Workforce Development Programs, including:
  - WIOA
  - TAA
  - MSFW
  - Wagner-Peyser

LWDBs must follow issued agency technical assistance and guidance specific to these qualifications, required training, specific duties, etc. that are required for those serving in these positions. Services and support to veterans and eligible spouses should not be delayed by the availability of a specific class, title, position, or staff member and should be provided by any available staff as soon as possible.

#### **D. Enrollment, Shared Services, and Partnerships**

The State has a commitment to the families of members of the military<sup>8</sup> in recognition of the sacrifices they make due to frequent moves and separations which can result in barriers to employment. LWDBs shall provide timely and focused services to these family members, i.e., spouses and dependents.

**Co-enrollment<sup>9</sup> of qualifying veterans and military family members is encouraged and, in some instances, required to maximize employment and training outcomes.** LWDBs are highly encouraged to effectively partner with local government, community partners, and businesses to maximize support for the goals of this program and to reduce the number of veterans requiring public assistance and increase the number of veterans and eligible spouses achieving self-sustaining employment through the training and supports provided.

#### **IV. IMPLEMENTATION**

Each LWDB must develop LOPs to implement this policy. Staff must upload all documentation, including that associated with eligibility, to the state-identified case management system. All required activities, including, but not limited to, outreach, co-enrollment, and remote contact, must be documented with appropriate case notes and service codes, consistent with guidance and technical assistance issued by FloridaCommerce.

Additionally, LWDBs must provide annual training to career center staff regarding priority of service and service to veterans and covered persons.

FloridaCommerce monitors compliance associated with this policy to ensure that LWDBs:

- Ensure covered persons are informed of their rights, are identified at point of entry, and receive priority of service.
- Have LVERs provide annual priority of service and veteran/military family member services training.
- Maintain local monitoring procedures.

#### **V. ATTACHMENTS AND RESOURCES**

<sup>8</sup> Section [445.055](#), F.S. describes members of the military.

<sup>9</sup> [Workforce Policy P111, WIOA Adult and Dislocated Worker Program Framework and Design.](#)

179	<a href="#"><u>DVOP Eligibility Screening Tool (Veteran Intake Form)</u></a>
180	
181	<a href="#"><u>Military Spouse Desk Reference</u></a>

# WORKFORCE POLICY DEVELOPMENT TRACKER

## SERVICES FOR VETERANS, MEMBERS OF THE MILITARY, AND SPOUSES

### A. GENERAL INFORMATION

<b>Policy Name:</b>	P111 Services for Veterans, Members of the Military and Spouses
<b>Policy Type:</b>	Programmatic
<b>Related Policies:</b>	<a href="#"><u>Workforce Policy P111 - Priority of Service for Veterans and Eligible Spouses</u></a> <a href="#"><u>Workforce Policy 102 – Veteran Intake at Career Centers (Sunset)</u></a> <a href="#"><u>Workforce Policy 103 – Local Veteran Employment Representative and Disabled Veteran Outreach Program Specialist Outreach Process at American Job Centers (Sunset)</u></a> <a href="#"><u>Workforce Policy 112 – Staffing Requirements (Sunset)</u></a> <a href="#"><u>Policy 117 – JVSG Employment and Advocacy Requirements (Sunset)</u></a> <a href="#"><u>Workforce Policy 119 – JVSG Consolidated Position Operational Requirements (Sunset)</u></a>
<b>Date to Publish:</b>	November 14, 2025

### B. PROJECT SUMMARY

CareerSource Florida and the Florida Department of Commerce (FloridaCommerce) collaborated to consolidate existing policies that provide the minimum requirements for implementing priority of service for veterans and eligible spouses for all U.S. Department of Labor (DOL) funded programs and services including the Workforce Innovation and Opportunity Act (WIOA), Wagner-Peyser, Trade Adjustment Assistance, Migrant and Seasonal Farmworker Program, Jobs for Veterans' State Grant Program (JVSG), and National Dislocated Worker Grants. Revised Workforce Policy P111 – Priority of Services for Veterans and Eligible Spouses ensures veterans, military members, and their families receive priority access to high-quality employment services. This supports faster job placement, reduces barriers, and strengthens the state's economy.

The policy is updated to align with federal and state laws and reaffirm Florida's commitment to being the most military-friendly state. The revised version is shorter, clearer, and focused on effective procedures that support veterans, transitioning service members and their dependents.

CareerSource Florida and FloridaCommerce worked with executive directors and staff of LWDBs to align the updated policy with the law, and existing policies. Policies were sent to all 21 LWDBs for consultation feedback. Upon approval, five of the additional policies cited above will be sunset and re-developed as technical assistance.

Feedback Response Key	
<b>Incorporated</b>	8 (53.3%)
<b>Future Action</b>	5 (33.3%)
<b>No Change</b>	2 (13.3%)
<b>Total</b>	15

## C. OVERVIEW OF CHANGES

Substantive Change	Location	Reason
Purpose and Scope expanded.	Section I. Purpose and Scope (Page 1)	Reaffirms Florida's commitment to being the nation's most military friendly state through the provision of high quality and responsive workforce programs, resources, and opportunities that strengthen the state's workforce and economy,
Measurable Performance Outcomes added including the requirement for "aligned, clearly written, and publicly posted Local Operating Procedures (LOPs) outlining processes to implement this policy."	Section II. Measurable Performance Outcomes (Page 2)	Adds public-facing procedures to improve accountability and ensure timely, effective services for veterans and spouses.
Policies and Procedures, Priority of Service modified to include intake procedures and eligibility for priority of service,	Section III. Policies and Procedures, A. Priority of Service (Pages 2-3)	Standardizes intake and eligibility to ensure veterans and spouses are identified early and served promptly, in line with federal and state rules. Standardized intake and clear eligibility definitions help LWDBs meet federal requirements ( <a href="#">20 CFR 680.650</a> ) and FloridaCommerce guidance, improving service consistency and accountability.
Where electronic kiosks are in use, they must allow self-identification. Electronic kiosks are not mandatory.	Section III. Policies and Procedures, A. Priority of Service, 1. Intake Procedures, a. Identification at Entry (Page 2)	Veterans may be identified in multiple ways so priority of service can be determined and provided. Additional information and support will be provided by FloridaCommerce via technical assistance.
LWDBs must implement standardized intake processes to identify and provide priority of service to veterans and eligible spouses. Employ Florida must be used to verify veteran status.	Section III. Policies and Procedures, A. Priority of Service, 1. Intake Procedures, b. Screening for Enhanced Services( Page 2)	Additional information will be provided by FloridaCommerce via technical assistance.

Policy revised to read “Eligible individuals must be referred immediately to DVOP specialists. If the individual declines DVOP services, a proper case note must be recorded in Employ Florida indicating that the eligible person is declining DVOP services”	Section III. Policies and Procedures, A. Priority of Service, 1. Intake Procedures (Page 2)	This change ensures that veterans and eligible spouses are immediately connected to DVOP specialists, who are trained to provide intensive employment services. Prompt referral helps reduce delays in accessing support, while documenting refusals in Employ Florida ensures accountability and compliance with federal requirements under <a href="#">20 CFR 680.650</a> . This strengthens service delivery, improves tracking, and supports better employment outcomes for those who served.
Policy revised to read: “If the DVOP specialist is unavailable, service must be provided by the next qualified staff member immediately. Additionally, a DVOP referral must be made and the DVOP Specialist has up to two business days to connect with the eligible person.”	Section III. Policies and Procedures, A. Priority of Service, 1. Intake Procedures (Page 2)	This practice helps ensure uninterrupted access to employment services for veterans and eligible spouses, even when DVOP specialists are temporarily unavailable. By requiring immediate service from the next qualified staff member and mandating a DVOP referral within two business days, the policy ensures timely engagement, minimizes service delays, and maintains compliance with federal standards <a href="#">under 20 CFR 680.650</a> .
Footnotes added.	Section III. Policies and Procedures, A. Priority of Service and B. Jobs for Veterans State Grant Program	Footnotes link to federal and state rules that guide how services must be delivered. Footnotes and references help clarify which groups get priority when multiple statutory priorities apply, ensuring veterans and eligible spouses are served correctly. This supports consistent and lawful implementation across LWDBs. Technical assistance will be provided by FloridaCommerce to support LWDBs.
Revised Policies and Procedures	Section III. Policies and Procedures, B. Jobs for Veterans State Grant Program (Page 3)	Aligns with federal and state guidance to ensure veterans receive targeted services through integrated staffing.
LWDBs must follow technical guidance issued by FloridaCommerce regarding eligibility for enhanced services provided by DVOP specialists and operational guidance for DVOP specialists and LVERs	Section III. Policies and Procedures, B. Jobs for Veterans State Grant Program (Page 3)	This requirement ensures LWDBs follow consistent rules when identifying who qualifies for enhanced services from DVOP specialists and how those services should be delivered. Guidance from FloridaCommerce helps LWDBs meet federal standards like <a href="#">20 CFR 680.650</a> and WIOA requirements, improves service quality, and ensures veterans and eligible



		spouses get the right support at the right time.
Revised Policies and Procedures relating to staffing requirements.	Section III. Policies and Procedures, C. Staffing (Pages 3-4)	Allows cross-trained staff to deliver services regardless of funding source, ensuring timely support and compliance.
Co-enrollment of qualifying veterans and military family members is encouraged and, in some instances, required to maximize employment and training outcomes.	Section III. Policies and Procedures, D. Enrollment, Shared Services and Partnerships (Page 4)	Co-enrollment helps veterans and military families get more complete support by combining services from different programs. It improves job and training outcomes by using all available resources. It also reduces the need for public assistance by helping people find stable jobs faster. Additional information and support will be provided via technical assistance by FloridaCommerce.
Revised Policies and Procedures related to Enrollment, Shared Services and Partnerships	Section III. Policies and Procedures, D. Enrollment, Shared Services and Partnerships (Page 4)	Supports military families through timely services, co-enrollment, and local partnerships that expand access and reduce employment barriers.
Each LWDB must develop local operating procedures to implement this policy. All documentation, including that associated with eligibility, must be uploaded to the state identified case management system.	Section IV. Implementation, (Page 4)	LWDBs to document procedures, upload eligibility records, and provide annual training to ensure consistent implementation and compliance.
Links are added to a WIOA Veterans Fact Sheet and a Military Spouse Desk Reference.	Section V. Attachments and Resources (Page 4)	Adds quick access to supporting materials for staff and stakeholders.

Policy/Template	Line	Type of Comment	Submission Date	Name	Local Workforce Development Board	Comment Entry	Recommended Resolution	Action Taken
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 64	Substantive	09-30-2025 14:47:57	Michelle Schultz	CareerSource Tampa Bay	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 64, Type of Comment (see directions): Substantive, Comment (Concern with citation): See below for customers who decline.	Comment (Proposed Resolution/E&B): Update to: Eligible individuals are offered DVOP services and if declined, proper case notes are indicated in IT that "At this time the Veteran customer is not interested in DVOP services."	This feedback was reviewed and the policy was revised to read: "Eligible individuals must be referred immediately to DVOP specialists. If the individual declines DVOP services, a proper case note must be recorded in Emply Florida indicating that the eligible person is declining DVOP services."
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 65	Substantive	09-30-2025 14:47:57	Michelle Schultz	CareerSource Tampa Bay	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 65, Type of Comment (see directions): Substantive, Comment (Concern with citation): Definition of "without delay." Recommended resolution below.	Comment (Proposed Resolution/E&B): If the customer is interested in still meeting with a DVOP a referral is made and the DVOP has up to 2 business days to connect with the Veteran customer.	This feedback was reviewed and the policy was revised to read: "If the DVOP specialist is unavailable, services must be provided by the next qualified staff member immediately. Additionally, a DVOP referral must be made and the DVOP Specialist has up to two business days to connect with the eligible person."
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 126	Substantive	09-30-2025 14:47:57	Michelle Schultz	CareerSource Tampa Bay	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 126, Type of Comment (see directions): Substantive, Comment (Concern with citation): Additional program: Transferring Service Members.	Comment (Proposed Resolution/E&B): Add Transferring Service Members (TSM) to the list.	No change needed. There is not a separate TSM program. They are served through Wagner-Peyser and, in some cases by DVOP Specialists as described in the. Recommend no change.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 161	Administrative	09-30-2025 14:47:57	Michelle Schultz	CareerSource Tampa Bay	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 161, Type of Comment (see directions): Administrative, Comment (Concern with citation): Add clarifying text below.	Comment (Proposed Resolution/E&B): Add "and determined to receive priority of service."	This feedback was reviewed and "military service members" was deleted.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 55	Substantive	09-30-2025 12:36:43	Danna Runge	CareerSource Broward Flagler Volusia	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 55, Type of Comment (see directions): Substantive, Comment (Concern with citation): The requirement that "Electronic kiosks must allow self-identification" is unclear. It does not define what qualifies as a kiosk or what specific form of self-identification is required. For example, at our center, the kiosk is used by individuals who have already been identified by staff, including veterans, so self-identification at the kiosk is redundant. Additionally, if the expectation is that kiosks must include a new interface or functionality, this may impose a burden depending on existing system capabilities.	Comment (Proposed Resolution/E&B): Define what is meant by "kiosk" (e.g., tablet/station electronic device, resource room computer, etc.) Consider allowing centers that perform identification through staff prior to kiosk use to be in compliance without additional kiosk functionality.	No change to policy needed. The policy as it reads allows for veterans to be identified in multiple ways so that priority of service can be determined and provided. Additional information and support will be provided via technical assistance.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 63	Substantive	09-30-2025 12:24:02	Danna Runge	CareerSource Broward Flagler Volusia	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 63, Type of Comment (see directions): Substantive, Comment (Concern with citation): The policy states that the Standardized Veteran Intake Form or an approved local equivalent must be used to determine eligibility. However, we currently use the D General Information section for this purpose, which is not a formal local equivalent. The requirement as written may not reflect the procedures currently used by all LWDBs and may cause confusion or unintended non-compliance.	Comment (Proposed Resolution/E&B): Clarify in the policy that the D General Information section may be considered an acceptable alternative to the Standardized Veteran Intake Form if it captures all required data elements for eligibility determination. Alternatively, provide guidance on how to seek approval for local equivalents.	Policy added to simplify and not require an additional form.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 130	Substantive	10/3/2025 1:00	Will Miles	CareerSource Okaloosa Walton	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 130, Type of Comment (see directions): Substantive, Comment (Concern with citation): LWDBs must follow issued agency technical assistance and guidance specific to these to qualifications... in these positions. Services and support to veterans, military service members.	Comment (Proposed Resolution/E&B): "military service members" could be misleading to include all military service members. Do you mean TSMs?	This feedback was reviewed and "military service members" deleted.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 128	Administrative	10/3/2025 0:53	Will Miles	CareerSource Okaloosa Walton	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 128, Type of Comment (see directions): Administrative, Comment (Concern with citation): LWDBs must follow issued agency technical assistance and guidance specific to these to qualifications...	Comment (Proposed Resolution/E&B): Need to correct the wording: "guidance specific to these to qualifications."	This feedback was reviewed and this language was revised.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 108	Administrative	10/3/2025 0:30	Will Miles	CareerSource Okaloosa Walton	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 108, Type of Comment (see directions): Administrative, Comment (Concern with citation): The rules for Veterans Start Grant (VSG) program provides staffing to LWDBs to 102 provide enhanced services that prepare eligible veterans, spouses. Should say veterans, eligible spouses.	Comment (Proposed Resolution/E&B): Should say veterans, eligible spouses.	This feedback was reviewed and this language was revised.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 40	Critical	10/7/2025 15:37	Gina RomoLargo	CareerSource Central Florida	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 40, Type of Comment (see directions): Critical, Comment (Concern with citation): Issue: Policy references multiple overlapping statutory priorities (WIOA, Wagner-Peyser, JVSJ). Without clear hierarchy, staff may struggle to apply consistent rules.	Comment (Proposed Resolution/E&B): Recommendation: Provide explicit priority sequencing guidance when multiple statutory priorities apply, supported by examples.	No changes to policy needed. Additional information is provided via a footnote in the current policy and technical assistance will also be provided to support understanding of LWDBs for this.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 47	Substantive	10/8/2025 15:37	Gina RomoLargo	CareerSource Central Florida	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 47, Type of Comment (see directions): Substantive, Comment (Concern with citation): Lines 47-57 - Intake Procedures Issue: Mandating kiosks, signage, and specific intake processes could be burdensome for smaller centers and may not fit all local layouts.	Comment (Proposed Resolution/E&B): Recommendation: Allow LWDBs flexibility in how they implement veteran identification procedures, provided outcomes (timely identification) are met.	No change to policy needed. The policy as it reads allows for veterans to be identified in multiple ways so that priority of service can be determined and provided. Additional information and support will be provided via technical assistance.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 102	Substantive	10/9/2025 15:37	Gina RomoLargo	CareerSource Central Florida	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 102, Type of Comment (see directions): Substantive, Comment (Concern with citation): Lines 102-108 - Integration of JVSJ Staff Issue: The requirement to fully integrate DVOP and UVER staff could create confusion over supervision and reporting lines.	Comment (Proposed Resolution/E&B): Recommendation: Clarify expectations for integration while maintaining compliance with JVSJ federal role definitions.	No changes to policy needed. The language in the policy does not override JVSJ role requirements.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 135-147	Critical	10/10/2025 15:37	Gina RomoLargo	CareerSource Central Florida	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 135, Type of Comment (see directions): Critical, Comment (Concern with citation): Lines 135-147 - Co-enrollment Issue: Policy "encourage and in some cases require" co-enrollment, but does not specify which cases are mandatory. This creates compliance risks.	Comment (Proposed Resolution/E&B): Recommendation: Provide a clear matrix of when co-enrollment is required vs. encouraged.	No change to policy needed. Additional information and support will be provided via technical assistance.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 31	Substantive	10/2/2025 15:18	Christina White	CareerSource Suncoast	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 31, Type of Comment (see directions): Substantive, Comment (Concern with citation): Under Section B: Measurable Performance Outcomes. The Policy states, "Additional measures of performance for this policy include signed, clearly written, and publicly posted local Operating Procedures (LOPs) outlining processes for procurement of tools and services." Was the "procurement of tools and services" an error? This does not seem relevant to the Veterans topic of the policy and is the same verbiage used in Policy 0126: Statewide Standardization of Tools.	Comment (Proposed Resolution/E&B): Recommend reviewing the language to determine if this should be referencing the JVSJ program requirements instead of purchasing and procurement.	This feedback was reviewed and revisions were made to this policy based on this suggestion.
<b>P111 Services for Veterans and Members of the Military and Spouses</b>	line 126	Administrative	10/3/2025 15:18	Christina White	CareerSource Suncoast	Select Policy: P111 Services for Veterans and Members of the Military and Spouses, Policy line Number: 126, Type of Comment (see directions): Administrative, Comment (Concern with citation): "LWDBs must follow issued agency technical assistance and guidance specific to these to qualifications, required training, specific duties, etc."	Comment (Proposed Resolution/E&B): Check the working on this sentence, it is not flowing correctly. "Specific to these to qualifications..."	This feedback was reviewed and revisions were made to this policy based on this suggestion.

Feedback Response Key			
Incorporated	Future Action	No change	TOTAL
9	4	2	15
60.00%	26.70%	13.30%	100%

# Information Items



## Speaker Bios

### Mildred Coyne

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Dr. Mildred G. Coyne is the CEO of Coyne Workforce Solutions (CWS), a consulting practice specializing in aligning talent supply with employer demand across Florida's key industry sectors. A 33-year veteran of the Florida College System and former Senior Vice President of Workforce Education and Innovation at Broward College, Dr. Coyne is recognized statewide for leading data-driven workforce strategies that expand economic mobility. She founded the Florida Council for Workforce Education and engineered Broward UP, a nationally recognized model for delivering education and training directly into underserved communities.

### Joshua Matlock

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Josh Matlock is the President and CEO of CareerSource Suncoast, a private nonprofit dedicated to strengthening businesses and communities in Manatee and Sarasota counties by cultivating a highly skilled and adaptable workforce. With over a decade of experience in workforce development, Matlock has been committed to making strategic investments in people and partnerships, fostering opportunities that empower individuals and drive long-term prosperity.

Matlock has the honor of serving on Manatee Technical College's Board of Governors, the board of directors for the Boys & Girls Club of Manatee County, Manatee Chamber of Commerce, Bradenton Area EDC, and Vice President of the Florida Workforce Development Association.

Matlock holds a BS in criminal justice, MA in political science, and MS in public administration from Midwestern State University.

### Lynda Weatherman

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Lynda Weatherman is the president & CEO of the Economic Development Commission of Florida's Space Coast.

Weatherman, a Florida native, earned a Bachelor of Arts in Social Sciences/Education from the University of South Florida and a Masters in Economic Development from the University of Southern Mississippi. Her work in economic development resulted in winning a Rotarian Fellowship to the University of Hong Kong where, in 1990, she completed a second Masters degree in International and Urban Planning.



In 2007, Weatherman was honored with the NASA Distinguished Public Service Medal, the highest honor NASA awards to both government and non-government employees.

Weatherman currently sits on the Board of Directors with the United Way of Brevard County, CareerSource Brevard, Central Florida Partnership, and the National Center for Simulation. Weatherman is also involved with the Enterprise Florida Partner Council, the Southern Economic Development Council, and she is an active member of CivMil.

Under Weatherman's leadership, the EDC's recent accomplishments include the successful attraction of Embraer's first and only U.S. manufacturing assembly plant, and facilitation of the first-ever Space Act agreement between Kennedy Space Center and an economic development organization.