



Executive Committee Meeting

Thursday, October 13, 2022 - 8:00 a.m. to 9:30 a.m.

Location: 3660 N. Washington Blvd, Sarasota, FL

This is an in-person meeting with virtual or call-in capabilities

[Join Microsoft Teams Meeting](#)

1-786-600-3104 Conference ID: 819 592 380#

AGENDA

Call to Order / Introductions – Eric Troyer, Chair

Action Items – Eric Troyer, Chair

- Approval of September 08, 2022 Executive Committee Meeting Minutes
- Approval of Policy #16 -22 Sector Strategies

CEO Report – Joshua Matlock

Other Board Business

Staff Reports

- Kathy Bouchard
- Robin Dawson
- Anthony Gagliano

Public Comments/Closing Remarks – Eric Troyer, Chair

Adjournment: – Eric Troyer, Chair

Next Executive Committee Meeting is November 10, 2022

**Note: Executive Committee meeting will be combined with the full Board meeting.*

Location 3660 N. Washington Blvd, Sarasota, FL

**CareerSource Suncoast
Executive Committee Meeting Minutes**
3660 North Washington Blvd
Sarasota, FL
Thursday, September 8, 2022
8:00 a.m.

Absent Present	<u>Committee Members</u>
P	Eric Troyer, CPA, Partner, Kerkering Barberio & Company
P*	Christy Cardillo, CPA, Partner, Carr, Riggs & Ingram, LLC
P	David Kraft, President, Vision Consulting Group
P	Sharon Hillstrom, President/CEO, Bradenton Area Economic Development Corporation
P*	Walter Spikes, Coldwell Banker Realty
P*	Peter Hayes, President, Tandem Construction
*	Virtual
	Staff Present, Josh Matlock, Robin Dawson, Kathy Bouchard, Anthony Gagliano, Linda Benedict, Michael Meerman*, Cody Soler, Christina Witt, Michelle Snyder, Karima Habity

I. Call to Order

Eric Troyer, Chair, called the meeting to order at 8:04 a.m., asked for roll call and attendance was recorded.

II. Action Items

Approval of June 10, 2022 Executive Committee Meeting minutes.

Mr. Troyer asked for a motion to approve the June 10, 2022 meeting minutes.

Motion: Sharon Hillstrom

Second: David Kraft

The motion passed unanimously.

Approval of Budget Modification #1 for PY22/23

Robin Dawson, VP/CFAO presented that the Finance and Performance Committee met on August 29th, 2022 to review and approved the PY 22-23 Budget Modification #1.

The original funding budgeted for PY 22-23 of \$6,399,042 was increased by \$104,200 with a final budget modification of \$6,503,242 for PY 22-23. Reserves for PY 23-24 were increased by \$227,909, leaving a balance in reserve \$434,037. Budget Modification #1 worksheets were included in the meeting materials. The following budgeted line items were increased.

- Personnel Costs: \$35,000
- Facility Costs: \$10,200
- Total Operating Costs: \$5,000
- Program Services: \$54,000

A motion was made to approve the Program Year 2022/2023 budget.

Motion: Sharon Hillstrom

Second: David Kraft

The motion passed unanimously.

III. Other Board Business

Finance and Performance Committee Update – Robin Dawson, VP/CFAO

The Finance and Performance Committee met on August 29th, 2022, to review the following reports in addition to the Budget Modification as previously discussed. The following items were reviewed.

1. Budget to Expenditure Report as of 6-30-22
 - a) Overall burn rate of 91%
 - b) Year ending federal and state requirements:
 - Admin 8.87%

- ITAs 38.5%
 - Youth Paid Internships/Work Experience PY20 21.93% & PY21 35.33%
 - Youth Out of School PY20 98.2% & PY21 97.16%
- c) Additional information provided on TANF Summer Youth funds: \$92,000 in gross wages were paid out to youth in the summer paid work experience program.
2. Summary of Non-Federal Funds as of 6-30-22

Both reports were included in the meeting materials.

Anthony Gagliano presented to the committee the latest report for the overall performance goals for PY 21-22 with eighteen different metrics broken down by funding stream. Performance goals that were met, exceeded, and not met were reviewed.

Anthony Gagliano shared that performance negotiations with the Department of Economic Opportunity (DEO) for the next two program years were completed and CSS was able to lower the rates of nine of the eighteen categories. These lower rates fall in line with comparable Regions across the state, noting that our performance measures from PY 21-22 exceeded the States average on all the targeted areas but one.

The REACH Act that was passed through legislation in 2021, included a Regional Workforce Board letter grade provision that will be based on key performance indicators as well as additional metrics, such as business penetration and public assistance recipients.

Robin Dawson shared CSS is beginning the annual CPA audit with James Moore and Company for the program year ending June 30, 2022.

DEO Programmatic and Finance Monitoring report PY21/22 – Anthony Gagliano VP/COO

The DEO financial and programmatic monitoring report from PY21-22, with a review period of January 1, 2021 through December 31, 2021, was received September 1, 2022 after the Finance and Performance Committee Meeting. The finance portion of the monitoring received zero findings again. The programmatic audit had a total of 12 findings for the year, which was a decrease from 21 findings in the previous year. Five findings were repeated from the previous year in 2021. None of the findings were related to eligibility of clients in training or appropriate training activities. There has been improvement and the goal is to continue to show improvement with the programmatic monitoring and continuous improvement team. The next DEO monitoring will be the first week of March in 2023.

Board Member Appointments

Eric Troyer announced the re-appointments and new Board member appointments.

Re-Appointments

- Jacki Dezelski – Manatee Chamber of Commerce, President/CEO
- Doug Wagner - Manatee County School Board, Deputy Superintendent
- Christy Cardillo - Carr, Riggs, & Ingram, LLC. , Partner

New Board Members

- Allison Imre - Grapevine Communications, President/CEO/Owner
- Ronald Serpliss – State College of Florida, Interim Dean of Lifelong Learning and Workforce Development

Josh Matlock provided an overview of the new Board members qualifications and an update on two potential new Board members, Shaun Polasky, Helios Technologies and Dr. Deborah Hawks, CAN Community Health.

IV. Staff Reports

Kathy Bouchard, V.P./Chief Talent Officer

The performance numbers movement in the letter grade and the comparison to states average grade will be incorporated into and account for up to 50% of the CEO evaluation moving forward.

CSS had the first of the approved four staff retreats with the next three scheduled in October, December and another one in the spring.

CSS' 7 Habits of Highly Effective People workshops are now being offered in person again to all new CSS staff members, clients assigned to a work activity in RESEA, SNAP and WT programs, as well as being open to the public.

CSS is offering Metrix learning, an online learning platform that offers thousands of soft skills courses and courses that can lead to a certification in IT, project management, human resources, etc. These are being offered to clients and are free to the public and employers in our community.

Ticket to Work continues to grow under Linda Benedict and Kim Gonzalez's work.

Michelle Snyder, Director of Continuous Improvement, has started on the corrective action plan (CAP) for the DEO program monitoring. In addition to the DEO CAP, she is continuing to work on the internal audits that James's team is conducting regularly. The first internal monitoring was completed, an internal CAP is required, keeping the same system we had with the external program monitoring firm, Taylor, Hall, Miller, Parker.

Robin Dawson, V.P./Chief Financial and Administrative Officer

No additional reports.

Anthony Gagliano, V.P./Chief Operating Officer

On the Workforce Education side, our new website rolled out in July, with more video content on it, including e-Rising and the State of Jobs conference.

Another round of CSS' CEO Platform for Success has launched with courses on Tuesdays, offering both day and evening options.

James and Manuel continue to work on the community impact dashboard to be posted on the website.

Diane Seavers, Apprenticeship Navigator, continues to work with companies and engaging community partners.

Since July, the operations team has already spent \$135,000 for scholarships, with another \$400,000 committed on the books for students the remainder of this program year.

CSS had several successful hiring events. Dunkin' Donuts made 10 offers to clients, including two persons with disabilities. Graham packaging had 136 individuals interview with them. The Department of Children and Family made 12 on the spot offers to clients who interviewed with them.

Karima Habyt shared that she is now a Board member with Habitat for Humanity and shared that there are additional job fairs that are being planned.

In meeting our goal of sharing our story, Ms. Habyt has made presentations to SCORE, the Venice Chamber of Commerce and the Manatee Chamber of Commerce in the past month. Mr. Disbro will be a presenter at the state's Annual Workforce Summit.

Josh Matlock, President/CEO

Josh provided an update on the re-alignment of workforce regions. The state is now in phase two of the re-alignment. The second phase will be working closely with stakeholders and doing more

research. The executive directors around the state will be meeting in Orlando next week to continue discussions on the re-alignment.

According to DEO, regional letter grades will be coming in October.

Josh shared that CSS is now using a labor market tool from Lightcast for the region. The MSA economy overview report will be shared with the Board. The small business study completed for the region will be presented at the upcoming full Board meeting this month.

V. CEO's Annual Performance Evaluation Review

The CEO performance evaluation reviewed five different areas: 1) Strategic development, 2) Board relations, 3) Serves as a change agent, 4) Risk taking / problem solving, and 5) Community leadership.

Rating key was as follows:

5 = Exceptional

3 = Meets expectations

1 = Below expectations.

Overall rating scale is as follows:

4.50 – 5.00 = Exceptional performance

3.50 – 4.49 = Above expectations

3.00 – 3.49 = Meets expectations

2.50 – 2.99 = Needs improvement

2.49 and below = Unsatisfactory

Based on the results of 5 performance evaluations completed by the Executive Committee members, Josh's overall rating was 3.88. His above expectation scores related to the following areas: board relations, serves as a change agent, and community leadership. There were no scores below 3.00.

Eric Troyer, Chair, led a discussion around the rankings and clarification of any comments from the summary of the performance evaluations. Eric will meet with Josh in the near future to discuss in detail the comments and performance appraisals.

The Executive Committee discussed compensation for the CEO. After discussion, it was unanimously agreed that Josh will receive a 3% cost of living / inflation increase effective on the next pay period.

It was noted that Josh became CEO effective February 4, 2022 with a salary of \$130,000. This initial starting salary assessment was determined through a review that included comparative salaries from various other workforce boards with comparative funding, as well as other relevant information.

The Executive Committee agreed that for 2023, the annual performance evaluation process would move to November for the following reasons:

1. Letter grades are expected to come out in October and will be used as part of the CEO evaluation process going forward.
2. There will be a CEO bonus structure beginning in November 2023 that will correlate with letter grade performance. The exact terms of the bonus structure will be determined at a later date.

VI. Public Comment/Closing Remarks – Eric Troyer, Chair None

VII. Adjournment

The next meeting is scheduled for Thursday, October 13, 2022. There being no further business, Chair Troyer adjourned the meeting at 9:45 a.m.

Respectfully submitted,



Joshua Matlock (Sep 27, 2022 11:15 EDT)

Josh Matlock
President & CEO

CAREERSOURCE SUNCOAST
Policy Approval
Executive Committee Summary
October 13, 2022

Background Information:

CareerSource Florida Administrative Policies are business rules, requirements, processes and responsibilities that expand, explain, or further specify federal or state legislation or policies developed by the Florida Department of Economic Opportunity. As CareerSource Florida (CSF) approves new Administrative and/or Strategic Policies, CareerSource Suncoast will review these policies to create or revise existing CSS policy and procedures for proper alignment. Earlier this year DEO released a memorandum requiring local boards to present all local policies to the Board of Directors for review and approval. Outlined below are two (2) CSS Board Policies for your review and approval.

Summary of Policy Additions/Changes:

Sector Strategies Policy #16-22:

This is a new policy outlining the CareerSource Suncoast (CSS) Sector Strategy requirements in accordance with the WIOA Section 108: Local Plan and Code of Final Rule 679.560. The policy provides CSS team members guidance on the key sectors of focus, prioritization, partnerships, and Sector Strategy tracking and sustainability.

Requested Action:

A motion that the Board approve the CSS Policy #16-22 – *Sector Strategies*.

Respectfully submitted,

Christina Witt,
Organizational Support Services Director



POLICY# 16-22

Policy: Sector Strategies	Page 1 of 1
Program: Workforce Innovation and Opportunity Act (WIOA)	
Section: Program Operations	
Date of Issuance:	Revision Date: N/A
Distribution: CareerSource Suncoast Team Members	

Background

The Workforce Innovation and Opportunity Act, Section 108(b)(1)(A) & (B), states “the local plan shall include a description of the strategic planning elements consisting of an analysis of the regional economic conditions including existing and emerging in-demand industry sectors and occupations; and the employment needs of employers in those industry sectors and occupations.” Local Workforce Development Boards should work with employers in targeted sectors and other partners to develop and implement sector strategies. Sector strategies should be mutually beneficial to the employer’s industry and the prospective employers.

Purpose

To provide guidance on the requirements of Workforce Innovation and Opportunity Act (WIOA) inclusion of Sector Strategies in the four-year local strategic plan and providing WIOA services.

Policy

In accordance with Code of Final Rule 679.560, Sector strategies and services for the local areas are developed to:

- a) To facilitate engagement of employers in workforce development programs, including small employers and employers in in-demand industry sectors and occupations;
- b) To support a local workforce development system that meets the needs of businesses in the local area;
- c) To better coordinate workforce development programs and economic development;
- d) To strengthen linkages between the one-stop delivery system and unemployment insurance programs; and
- e) That may include the implementation of initiatives such as incumbent worker training programs, on-the-job training programs, customized training programs, industry and sector strategies, career pathways initiatives, utilization of effective business intermediaries, and other business services and strategies designed to meet the needs of regional employers. These initiatives must support the strategy described in paragraph (b)(3) of this section;

CareerSource Suncoast (CSS) aligns its resources to key industry sectors targeted by the two primary regional economic development organizations (EDOs), which are the Bradenton Area Economic Development Corporation (BAEDC) and the Economic Development Corporation of

Sarasota County (EDCSC). EDO- targeted industry sectors represent those that already have a presence in the region, feature strong revenue growth potential, and create high-wage, high impact jobs. These key industries include advanced and specialty manufacturing, medical and life sciences, information technology, aviation/aerospace/defense, agriculture technologies, environmental sciences and sustainable development, corporate headquarters, sports performance, creative services and web-enabled technologies.

CSS has identified the following five key sectors for the regions area of focus.

1. Construction
2. Healthcare
3. Information technology
4. Manufacturing
5. Finance and Insurance

To the extent feasible given local conditions, CSS business and job seeker services and service delivery are designed and organized to reflect a focus on sector priorities and are relevant to the identified workforce needs of employers in target sectors. CSS will prioritize their identified sectors for issuance of WIOA training dollars for ITAs and employer-focused activities, such as customized training and incumbent worker training.

CareerSource Suncoast meets with EDOs on a regular and ongoing basis to evaluate progress on delivering talent solutions and training resources for specific projects related to key sectors. Additionally, occupations for these key industries are included in the regional targeted occupations list where career seekers interested in advancing their careers utilizing individual training accounts are informed about these high-wage career opportunities. CareerSource Suncoast also works closely with regional education and training providers on a regular and ongoing basis to assist them in their efforts to align with key industry sector training needs.

Industry Partnerships:

Through partnerships with our local economic development corporations, BAEDC and EDCSC, CSS works to align with industries for our targeted sectors. Furthermore, CSS focuses on industries with high growth and high wages using data from DEO's Supply Demand Report and other data sources from the department such as Employment Projections and Occupational Employment Statistics and Wages (OES).

Sector Strategy Tracking and Sustainability:

CSS tracks work-based training and occupational skills trainings services provided by industry and occupation through a PowerBI dashboard. Each year CSS will include Sector Strategies in the organizational goals. Organizational goals are tracked on a quarterly basis through the Workteam software. CSS will utilize the states Management Information System and Accounting/ITA software reports for tracking goals.

Attachments:

- None

Authority:

- [eCFR :: 20 CFR 678.435 -- What are the business services provided through the one-stop delivery system, and how are they provided?](#)
- [eCFR :: 20 CFR 679.560 -- What are the contents of the local plan?](#)
- [WIOA Section 108](#)
- [sector-strategy-toolkit.pdf \(floridajobs.org\)](#)

Supersession:

- **None**

Inquiries:

Any questions about this policy should be directed to the CEO, COO, CFAO and/or their designee.

DRAFT



CEO Report



STAFF REPORTS

CareerSource Suncoast July 2022 Quality Assurance Internal Monitoring Report Wagner-Peyser Jobseekers, RESEA Programs and JVSG

This report includes the results of the July 2022 CareerSource Suncoast internal monitoring following programs administered by CareerSource Suncoast: Wagner-Peyser Program Jobseekers and Reemployment Services and Eligibility Assessment (RESEA) and Jobs for Veterans State Grants.

Enter corrective action plan (CAP) responses for all Findings and Other Noncompliance Issues (ONI) where indicated in blue (**Response**) in the July 2022 CSS Internal Monitoring Responses document on the Programs Portal. A link to the document is provided below. Observations identified in this report are informative statements or constructive comments to improve the delivery of services and to help ensure continued fiscal integrity of the LWDB. Observations are not expected to be responded to in the CAP responses.

If training is or will be provided, include the date of the training or the scheduled date for the training in the response. Once scheduled training has been completed, an agenda and sign-in sheet for each training must be submitted. If corrections are made in EF or a missing or corrected document placed in a participant's file, corrected and/or filed documentation must be submitted. Place supporting documentation (missing documents, screen shots, etc.) in the July 2022 Supporting Documentation folder on Programs Portal. A link to the folder is provided below.

Notify the CSS Q.A. Coordinator by email at dlee@careersourcesc.com once all responses are completed and documentation submitted as identified above.

This review included a total of thirty-four (34) files as follows: Wagner-Peyser Jobseekers – twelve (12); Wagner-Peyser Reemployment Services and Eligibility Assessment (RESEA) – fourteen (14); Jobs for Veterans State Grants (JVSG) – eight (8).

The following is the path and links to the July 2022 Monitoring Response Document and Supporting Documentation folders:

Programs Portal – Monitoring – CSS Internal Monitoring – July 2022

Monitoring Response Document – July 2022: [Monitoring Response Document- July 2022](#)

Supporting Documentation – July 2022: [Supporting Documentation - July 2022](#)

Monitoring Tools – July 2022: [Monitoring Tools - July 2022](#)

WAGNER-PEYSER (WP) PROGRAM

JOBSEEKERS

FINDINGS - 2

Finding - Q2 & Q3 (combined) – Sample 5: The case note entered in EF on 03/31/2022, subject "Individual Registration Type" Created" does not state the job seeker granted permission to create the EF account. It states, "The information given was entered under client's supervision". In addition, the date of the "Individual Registration Type" Created" case note is not prior to or the same day of the jobseeker 03/30/2022 registration creation date.

Response:

Finding - Q30 – Sample 10 - Assessment Case Note: The assessment is not documented in EF Plan wizard, in paper copy or in case note titled "Activity 102 - Initial Assessment" created in 03/21/2022.

[Response:](#)

OTHER NONCOMPLAINE ISSUES (ONI) - 1

ONI - Q34 – Samples 7 - 10: Plans do not include specific individualized action steps to achieve the goals. NOTE: #10 - No specific goal descriptions identified for goals. Short term goal description is "Short Term", and long-term goal description is "Long Term".

[Response:](#)

OBSERVATIONS - 2

Observation – Sample 7 - English, R. - Objective Assessment: Nonessential details recorded in EF Objective Assessment wizard and case note for unstable living environment regarding destruction of personal documentation.

Observation - Samples 1 & 8 - Service Code Issue: Service code 114 - Staff Assisted Job Search was erroneously recorded in EF. A staff-assisted job search was not provided. Individuals were included in a MSFW mass recruitment/hiring event.

REEMPLOYMENT SERVICES AND ELIGIBILITY ASSESSMENT (RESEA)

FINDINGS - 0

NONE

OTHER NONCOMPLAINE ISSUES (ONI) - 7

ONI- Q6 – Samples 2 & 3 & 14 - Labor Market Information (LMI):

#s 2 & 3 - LMI information was not provided in an EF case notes or paper/electronically filed documentation.

Sample 14 - Labor Market Information specific to an occupation based on the participant's education/employment experience, skills and desired occupation was not in EF case notes or participant's file at the time of the review. The service 107 section of the EF "RESEA Completed" case note created 06/17/2022 does not identify the labor market information provided participant. In addition, all dates in the RESEA Completed case note, except one, includes XX/XX for the month and day and the year for all dates is 2019. It appears that case note was copied and not updated to include specific information for this jobseeker.

[Response:](#)

ONI – Sample 12 – Short Term Goal Action Steps: There are no specific actions steps listed for participant to work toward achievement of short-term goal in Marketing. The Comments section of the Short-Term goal states what CC explained to and informed participant of what client is currently doing.

NOTE: IEP Short Term Comment states staff "Explained to client that she qualifies for the on-the-job training." Staff should be cautioned to avoid telling clients they qualify for a program if has not been determined.

Response:

ONI - Q14 – Samples 1, 3, 4, 5, 6, 7 & 14 – Work Search Activity (WSA): The plans for these participants do not include a specify work search activity.

NOTE: Admin Policy 068 states: "Specific details regarding the assigned work search activities must be noted in the EDP and documented in EFM as described in the 'work search activity' section."

Response:

ONI - Q15 – Samples 9 & 10 – Work Search Activity Resulting: The work search activities for these participants were scheduled through Employ Florida Event Calendar module but were not resulted. Employ Florida Event Calendar module shows "Registered" for these participants WSA at the time of this file review.

Response:

ONI - Q16 – Samples 2, 3 & 14 – Responsibility Statement: A copy of the RESEA Responsibility Statement form is not available. There were no documents in Atlas for these participants at the time of this file review.

Response:

ONI - Q18 – Sample 11 - WSA Date: Responsibility Statement identifies May 7, 2022, for WSA 7 Habits Foundation date. The IEP/EDP identifies May 6, 2022.

Response:

ONI - Q19 - Red Flag Report: Red Flag Report generated 08/01/2022 contains 15 cases with a schedule date that is more than 7 days old.

Response:

OBSERVATIONS - 3

Observation - Q3 - #2, 3 & 14 – Assessment Case Notes & Documentation: CSS Q.A. Coordinator answered 'y' to this question due to the EF Objective Assessment Summary being completed in the plan wizard. There are no CSS staff created case notes in EF for samples 2 & 3

and no documents in Atlas for the most recent RESEA participation for all samples listed. Staff should be reminded that a case note is required for this service (102) as identified in the DEO Service Code Guide.

Observation - Q4 – Sample 12 – Objective Assessment Summary Employment Expectations: OAS lists Employment Expectations Waiters and Waitresses for Occupation 1 and Food Servers, Non-restaurant for Occupation 2. EF Initial Assessment case note and IEP/EDP short term goal states “client is interested in obtaining an entry level marketing position”. Entry level Marketing position is not identified in Employment Expectations.

Observation – Sample 10 – Participant’s Last Name: Participant's last name in EF is Adema. Last name in Atlas is McIntyre. Participant's printed last name and signature on all documents in file is Adema except on the Responsibility Statement, the printed last name is McIntyre with Adema for signature. Please check and make corrections and/or enter a case note regarding the different last names if needed.

JOBS FOR VETERANS STATE GRANTS (JVSG)

FINDINGS - 1

Finding - Q5 – Samples 2 & 3 - Notification of Veteran Priority of Service: Priority of Service was not provided with new WP application. Staff must ensure that a 189-service code is recorded within each new Wagner Peyser application if no automated 089 code is present.

[Response:](#)

OTHER NONCOMPLIANCE ISSUES (ONI) - 1

ONI - Q11 - Samples 1 - 8 - IEP Goal Objectives & Action Steps: IEP Objectives "Review Resume" and "Job Search and referral" are identified in all IEPs except #6 which lists Objectives "Obtain Permanent Housing" and "Register for School". The IEP Goal Objectives do not identify specific action steps to be completed that will assist the participant in reaching the goals as required.

[Response:](#)

OBSERVATIONS - 4

Observation – Sample 3: Objective Assessment Employment Barrier Summary contains specific medical details about participant. Specific details about a participant's physical and emotional health must not be documented in Employ Florida (See Admin Policy 117 at bottom of page 4).

Observation - Objective Assessment Summaries - Samples 2, 3, 4, 5, 7 & 8: The Objective Assessment Summary Overall Note is repeated throughout the assessment in most (or all) of the following sections of OAS for the review samples identified: Services Sought, Other Assistance Expected, Education History Assessment Summary, Basic Skills/Education Factors Summary, Summary of Skill Assessment, Work Readiness Summary, Work Behavior Assessment Summary, Health & Behavior Observations, Living Environment Assessment, Economic Factor Situation Assessment, Other Assistance Assessment and Employment Barriers Summary. The OAS

summaries, observations, assessments should be specific to the areas/sections in which it is recorded.

Observation - IEP - Samples 1-5, 7 & 8: A copy of the IEP was not filed for JVSG review samples 1 – 5, 7 & 8. Admin Policy 117 (Effective Date August 20, 2021), page 7, a. Developing the Individual Employment Plan states "The IEP should be signed by the participant and must be retained in the participant's file".

Observation – Sample 8 - Service Code V09 - JVSG Consistent Contact": Staff entered Service code V09 - JVSG Consistent Contact in EF on 05/06/2022 with attached case note subject "Unsuccessful Contact". Unsuccessful consistent contact attempts must not be recorded using service code V09 (JVSG – Consistent Contact). Unsuccessful consistent contact attempts must be documented with a case note titled "Unsuccessful Contact Attempt" and include the method of contact and outcome of the attempt (e.g., left voicemail, phone disconnected, email returned as undeliverable, etc.). (See Admin Policy 117, page 12, #9 last paragraph and EF Service Code Guide). In addition, unsuccessful contact attempt case note titles must be numbered in sequential order to indicate the number of attempts made.

Staff entered a second service V09 in EF on 05/10/2022 with attached case note subject "Case Closed". The case note does not include all requirements of a consistent contact case note as identified in DEO's EF Service Code Guide.