



Board of Directors Meeting

Thursday, March 23, 2023 - 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: 406052197#

AGENDA

Call to Order / Introductions – Eric Troyer, Chair - Partner, Kerkering Barberio

Action Items – Eric Troyer, Chair

- Consent Agenda – Eric Troyer
 - Approval of January 26, 2023 Board Meeting Minutes
 - Approval of CSS Board Policy # 18-22 Eligible Training Providers List
- Approval of Related Party Agreements – Christina Witt

CEO Report – Joshua Matlock

Other Board Business

- CSS Board Member Resignations
 - Pranov Mayor - Star Student with the Boys and Girls Club
 - Representing a workforce organization addressing the employment and training/education needs of eligible youth.
 - Christine Clyne – Life Star Living, LLC
 - Representing Business Sector
 - Jamie Kahns - Bank of America
 - Representing a Business Sector
- Mandatory Annual Refresher Training for Board members- Leadership Team

Staff Reports

- Kathy Bouchard
- Robin Dawson
- Anthony Gagliano

Public Comments/Closing Remarks – Eric Troyer, Chair

Adjournment - Eric Troyer, Chair

Next Board of Directors Meeting is May 25, 2023

Location: 3660 N. Washington Blvd, Sarasota, FL



Consent
Agenda

**CareerSource Suncoast
Board Meeting Minutes**

Virtual TEAMS Meeting & In-person at 3660 N. Washington Blvd., Sarasota, FL
Thursday January 26, 2023
8:00 A.M.

I. Call to Order

Eric Troyer, Chair, called the meeting to order at 8:00 a.m., roll call was performed, quorum confirmed.

II. Introductions/Chief Local Elected officials for 2023 - Eric Troyer, Chair

- Sarasota Commissioner Joe Neunder
- Manatee Commissioner George Kruse – re-appointed

III. Action Items

Approval of November 10, 2022 Combined- Executive Committee and Board Meeting Minutes - Eric Troyer

Eric Troyer requested a motion to approve the November 10, 2022 meeting minutes.

Motion: Luis Font

Second: Ron DiPillo

The motion passed unanimously.

Approval Consent Agenda – Policies – Eric Troyer

Eric Troyer requested a motion to approve the Consent Agenda Policies.

- Records Management, Retention and Destruction Policy #11-21
- Incident Reporting Policy#17-22
- Adult and Dislocated Worker Eligibility Policy #19-22

Motion: Lisa Eding

Second: Timothy Novak

The motion passed unanimously.

Approval of Request to Transfer Funds from Dislocated Worker to Adult – Robin Dawson

Robin Dawson requested a motion to approve the prior approval request to transfer funds from Dislocated Worker to Adult funding of \$475,000.

Motion: Luis Font

Second: Ron DiPillo

The motion passed unanimously.

Approval of Related Party Agreements/Expenditures – Christina Witt

Christina Witt requested a motion to approve up to \$9,000 from 01/26/2023 through 06/30/2023 in related party expenditures for Sun Hydraulic Corporation for Work-based learning agreements and work-based learning contracts.

Motion: David Kraft

Second: Jim Bos

Abstain: Shaun Polasky and Ron DiPillo

The motion passed unanimously.

IV. CEO Report

CEO & President Joshua Matlock provided an update on leadership changes. Governor Ron DeSantis announced Meredith Ivey as the acting Secretary of the Department of Economic Opportunity (DEO). She was formerly the Chief of Staff at DEO.

Michelle Dennard, the president/CEO of CareerSource Florida (CSF) has resigned effective January 31, 2023. Adrienne Johnston has been appointed as the new President/CEO of CSF. Ms. Johnston has been with DEO for seven (7) years as the State economist and most recently was the Deputy Director of DEO's Workforce Services Division.

In February, CSF and the Florida Workforce Development Association (FWDA) will be having their Board meetings in Tallahassee. Mr. Matlock and VP/COO Anthony Gagliano will be attending the meetings. CSF will be announcing the results of the REACH act re-alignment survey from Ernst & Young (EY). CSF has shared that there will be some options presented to the Local Workforce Development Boards for re-alignment at a February 7th meeting. The final vote for consolidation will be conducted at the CSF Board meeting on February 23, 2023.

The CSF quarterly letter grades update was provided. CSS overall letter grade has improved to a B grade at 86.1. CSS now has a good understanding of the letter grade methodology after attending a technical assistance webinar for all regions in January. The CSF [website for the letter grades](#) will be sent to the Board of Directors.

V. Other Board Business

One-Stop Operator Report

CSS One-Stop Operator, Dr. Ron Natale of Educational Management & Services FI. LLC, provided the semi-annual One-Stop Operator report to the Board. Dr. Natale highlighted the quarterly mandated partner meeting's agenda, the meeting satisfaction survey, the infrastructure funding quarterly report process, the Crosswalk agency-to-agency referral system and recommendations to CSS.

Dr. Natale recommended CSS hold an annual awards dinner, reception or luncheon to celebrate client accomplishments. Awards could be given to clients enrolled in CSS programs.

VI. Staff Reports

Kathy Bouchard, V.P./Chief Talent Officer

A staff retreat was held in December. The work session focused on letter grades, performance and the principles of the book, Humanocracy. The staff engagement progress poll was conducted at the retreat. There were some areas that went down and some that showed improvement. The organization is continuing to feel the impact of a reduction in staff with 12 fewer employees this program year.

The Fostering Opioid recovery grant is offering a [Human Resource training](#) to local employers. The training provides training to assist employers in identifying drug use in the workplace. The training provides CEUs through SHRM. The flyer for the training will be shared with the board.

The Covid-19 grant has been offered an extension through June 30, 2023. The grant was originally scheduled to end on March 31, 2023. The Covid-19 grant assists clients with temporary employment and has assisted several Ticket-to-Work (TTW) clients, introducing them back into the workforce.

CSS currently has 106 TTW clients, with forty nine (49) currently working. Of those 49, eight (8) are working under the Covid-19 grant.

CSS was awarded \$338,000 for a Non-Custodial Parent Employment Grant. The Non-Custodial Parent Employment grant is a short-term grant of only six (6) months. The grant objective is placing non-custodial parents into employment or into a better paying job so that they can pay their child support timely and in full. There is currently a position open for a Grant Coordinator to oversee the grant.

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

Due to the current expenditure rate, CSS was awarded an additional \$250,000 in Temporary Assistance for Needy Family funds. These funds will be used for the Summer Youth Employment Program.

The Interlocal agreement process has begun with Manatee and Sarasota Counties. The agreement is currently with each county's attorney for review. The Interlocal agreement changes were required from DEO to include CSS as the designated fiscal agent for the region, as well as some additional administrative changes to align with Board membership and the approved CSS Bylaws.

There is a Finance and Performance Committee meeting this month on January 31, 2023. The committee will be discussing policy language regarding the use of non-federal funds.

CSS was asked to submit a revised budget of \$400,000 to DEO for WIOA state set-aside funds. The funds will be used for client training.

New office locations options for the Bradenton office were shared with the Board. There were four locations shared as options being considered. Two of the locations would require full buildouts, and CSS may need to find a temporary location until the buildout is completed. Temporary options are being looked at if needed.

Anthony Gagliano, V.P./Chief Operating Officer

The monthly internal monitoring report was provided in the meeting agenda packet. The full report was provided for review. There were fourteen (14) findings. The responses provided in the report will show that most of the findings were corrected, or they did not result in any eligibility issues.

The CSS Performance Dashboard, [located on the CSS website](#) was reviewed, showing the PY 2022/23 Quarter 2 performance metrics. The dashboard shows metrics on Career Services, Occupational Skills and On-the-Job Training Services, Apprenticeships and Employer services.

The video for the [2nd annual eRising Conference](#) from November was shared with the Committee to highlight the work that is being done around entrepreneurship.

A CSS client won [FloridaMakes apprentice of the Year](#). The award recipient is a Tool and Die maker at PGT and a Suncoast Technical College graduate, who went through the CSS sponsored apprenticeship program. A video of the client speaking about his experience with the CSS apprenticeship program and PGT was presented.

VII. Public Comment/Closing Remarks – Eric Troyer, Chair

Jim Bos requested an explanation on the services offered on the Hurricane Ian grant. An overview of the grant was provided.

Eric Troyer provided closing remarks on the re-alignment and consolidation of the boards.

VIII. Adjournment – Eric Troyer, Chair

Meeting was adjourned at 9:17 am

Next Board of Directors Meeting is March 23, 2023
Location 3660 N. Washington Blvd, Sarasota, FL

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CAREERSOURCE SUNCOAST - BOARD MEETING ATTENDANCE

| Absent Present | Board Member |
|-------------------|---|
| P | Jim Bos, President, MJB Group |
| P* | Ashley Brown, President, Women's Resource Center |
| P* | Christy Cardillo, CPA Tax Manager/Partner, Carr, Riggs & Ingram, LLC. |
| A | Christine Clyne, HR Director, Lifestar Living LLC |
| P* | Jackie Dezelski, President, Manatee Chamber of Commerce |
| P | Ron DiPillo, Executive Director, Sarasota County Schools |
| P | Lisa Eding, Teak Decking Systems |
| P | Luis Font, LIUNA, Laborers International Union |
| P | Roscelyn Guenther, Boys & Girls Club of Sarasota County |
| A | Peter Hayes, President, Tandem Construction |
| P* | Sharon Hillstrom, President/CEO, Bradenton Area Economic Development Corporation |
| P | William Zack Holland, Local 123 Plumbers and Pipefitters Union |
| P* | Allison Imre, Grapevine Communications |
| A | Jamie Kahns, Marketing Manager, Bank of America |
| P* | Heather Kasten, President, Sarasota Chamber of Commerce |
| A | Pranav Mayor, Star Student, Pine View High School |
| P | David Kraft, Founder, Vision Consulting Group |
| P* | Tim Novak, Dean, LECOM |
| P* | Ericka Randall, Supervisor, Vocational Rehabilitation |
| P* | Ronald Serpliss, State College of Florida |
| A | Walter Spikes, Realtor, Bright Realty |
| P | Eric Troyer, CPA/Partner, Kerkering Barberio & Company |
| P* | Doug Wagner, Deputy Superintendent, Manatee County School Board |
| P* | Ken Waters, VP, Residential Services, Sarasota Housing Authority |
| P | Shaun Polasky, VP People Operations, Helios Technologies |
| A | Deborah Hawkes, COO, CAN Community Health |
| | |
| | Staff Present: Josh Matlock, Robin Dawson, Kathy Bouchard, Anthony Gagliano, Karima Habity*, Linda Benedict, Michael Meerman, Christina Witt, Michelle Snyder*, James Disbro* |
| P* | Commissioner George Kruse |
| P | Commissioner Christian Zeigler |

26 Board Members – 20 present, 06 absent

Respectfully submitted,

Joshua Matlock

[Joshua Matlock \(Jan 30, 2023 09:20 EST\)](#)

Josh Matlock
 President & CEO

CAREERSOURCE SUNCOAST
Consent Agenda Policy Approval
Board of Directors Summary Report
March 23, 2023

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 Three (3) CSS Board Policies for your review and approval.

Summary of Policy Changes:

CSS Board Policy #18-22, Eligible Training Provider Lists

This policy supersedes and replaces Policy and Procedure #11-01 Procurement and Approval of Training Vendors and Programs dated 01/10/2014. The Policy was updated to reflect changes provisions for the Eligible training Provider Lists requirements outlined in the Workforce Innovation and Opportunity Act, the Department of Economic Opportunity Administrative Policy #090- WIOA Eligible Training Provider List, and the Reimagining Education and Career Help Act.

Requested Action:

A motion that the Board of Directors approve the CSS Board Policy # 18-22 Eligible Training Providers List.

Respectfully submitted,
Christina Witt Organizational Support Services Director



POLICY# 18- 22

| | |
|---|---------------------------|
| Policy: Eligible Training Provider List | Page 1 of 11 |
| Program: Workforce Innovation and Opportunity Act (WIOA) and Welfare Transition (WT) | |
| Section: Program Operations | |
| Date of Issuance: | Revision Date: N/A |
| Distribution: CareerSource Suncoast Team Members | |

Background

The Workforce Innovation and Opportunity Act (WIOA), Section 122, requires the Governor, through CareerSource Florida, to establish criteria, information requirements and procedures regarding the eligibility of providers of training services to receive funds provided under section 133(b), WIOA, for the provision of training services in local areas in the State.

This policy describes the process for determining eligible training providers for WIOA Title I-B adult and dislocated worker training participants and for publicly sharing the list of eligible providers with relevant information about their programs.

The State and Local Boards' Eligible Training Provider Lists (ETPL) and the related eligibility procedures ensure the accountability, quality and labor-market relevance of training services programs that receive funds through WIOA title I-B. The State and Local Boards' ETPLs are also a means for ensuring informed customer choice for individuals eligible for training. In administering the eligible training provider process, the State and Local Boards must work to ensure that qualified providers, offering a wide variety of job-driven training programs, are available.

The State and Local Boards' ETPLs are made publicly available online through Web sites and searchable databases as well as any other means the State and Local Boards use to disseminate information to customers. The ETPLs, easily available in an electronic format, are accompanied by relevant performance and cost information and are presented in a way that is easily understood, in order to maximize informed customer choice and serve all significant populations groups.

Purpose

The purpose is to provide guidance to CareerSource Suncoast(CSS) staff, as well as post-secondary training providers of training services programs funded under the Workforce Innovation and Opportunity Act (WIOA), regarding the Eligible Training Provider ("ETP") requirements. The document provides guidelines for: the initial and subsequent determination of eligibility of training providers; the federal and state requirements for training providers; performance standards, the reporting of data and the removal provisions for training providers.

Policy

The CSS Eligible Training Provider List (ETPL) and the related eligibility procedures ensure the accountability, quality and labor-market relevance of training services programs that receive funds through WIOA title I-B. The ETPLs is a means for ensuring informed customer choice for individuals eligible for training. In administering the eligible training provider process, CSS must work to ensure that qualified providers, offering a wide variety of job-driven training programs, are available. CSS's

ETPL is made publicly available online at the CSS website, [Home - CareerSource Suncoast](#) . The ETPLs, includes information on the training programs and providers to include, but not limited to, relevant program performance, duration of the program and cost information in order to maximize informed customer choice and serve all significant populations groups.

Training Providers and Programs Subject to the ETPL Requirements

Eligible providers of training services programs (“ETP”) are entities that are eligible to receive WIOA title I-B funds for adult and dislocated worker participants who enroll in training services programs through “Individual Training Accounts” (“ITA”). ITAs may also be used for WIOA Title I Youth funds to provide training to older, out-of-school youth, ages 18 to 24. To be eligible to receive training funds under Section 133(b), WIOA, the ETP and the programs must be:

- Higher Education - An institution of higher education that provides a program that leads to a recognized postsecondary credential, or;
- Apprenticeship Program - An entity that carries out programs registered under the Act of August 16, 1937 (commonly known as National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.), or;
- Other public/private providers - Other public or private providers of training services programs, which may include joint labor-management organizations, pre-apprenticeship programs and occupational/technical training, or;
- Adult Education and Literacy Activities - Providers of adult education and literacy activities under title II if such activities are provided in combination with occupational skills training.
- Targeted Occupation List (TOL) Compliant - With the exception of V(B)(2) training providers, all other training providers’ programs shall be for training for occupations on the applicable Local Board TOL, current at the time of training, to be eligible to receive training funds under Section 133(b), WIOA.
 - Note: A public or private school district that maintains AdvancED/SACS accreditation and provides occupational skills training in combination with a high school diploma may be an eligible training provider
- Note: A public or private school district that maintains AdvancED/SACS accreditation and provides occupational skills training in combination with a high school diploma may be an eligible training provider.

WIOA Training Provider/Program Eligibility

Training providers must apply and meet specific provider and program eligibility requirements. However, there are providers that are exempt from the eligibility process.

Exempt Eligible Training Providers

Entities that carry out apprenticeship programs registered under the National Apprenticeship Act (NAA) (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq.) are exempt from “Initial” and “Continued Eligibility” application procedures to be included on the CSS ETPL. Registered Apprenticeship programs are not subject to the same application and performance information requirements or to a period of initial or continued eligibility as other providers because they go through an extensive application and vetting process to become a Registered Apprenticeship program sponsor with the USDOL or the SAA.

Registered apprenticeship (RA) programs may opt into being included on the CSS ETPL by providing relevant information for inclusion and entering into a CSS Registered Apprenticeship Program Training Provider agreement. Registered Apprenticeship programs are to be included and maintained on the

ETPL as long as the corresponding program remains registered, renews the CSS RA agreement every two years, or notifies CSS in writing that it no longer wants to be included on the ETPL.

Important Note: In accordance with the Department of Labor (DOL), Training and Employment Guidance Letter (TEGL) 13-16, Pre-apprenticeship programs do not have the same automatic ETP status under WIOA as do Registered Apprenticeship programs according to DOL-only Regulation § 680.470(f). The USDOL does not register or regulate pre-apprenticeship programs, although we have defined the attributes of a quality pre-apprenticeship program (see TEN 13-12).

Provider and Program Initial Eligibility

All new training providers must apply through the CSS “Initial Eligibility” application procedure to be included on the CSS ETPL. The Initial Eligibility process is published on the CSS website at [Become a Training Provider - CareerSource Suncoast](#). In addition, the application period for submitting Initial or continued ETPL eligibility will be set on an annual basis and will be publicly noticed on the CSS Public Notices page on the CSS Website, [Public Notices - CareerSource Suncoast](#)

“Initial Eligibility” requirements (as well as the criteria of the Local Boards to which the provider is applying). Providers of training services programs seeking “Initial Eligibility” receive “Initial Eligibility” for only one (1) full year, after which they may seek “Continued Eligibility”. The provider shall complete the initial eligibility application and identify and supply verifiable program-specific performance information pursuant to established State and CSS criteria. To be determined eligible for the CSS ETPL the training provider must:

- Must be in business under the current ownership for a minimum of two years.
- Provide verification the provider is a public school or licensed by the Florida Department of Education Commission for Independent Education (CIE), or otherwise authorized under Florida law(if Applicable) to provide the proposed training program(s). This applies to in-state and out-of-state providers.
 - Licensure documentation for each course proposed in the application must be provided to CSS.
 - Private training providers must contact the Commission for Independent Education (CIE) at (850) 245-3200 or online at <http://www.fldoe.org/cie/> to obtain licensure.
- Provide a detailed description of each training program being submitted for inclusion on the ETPL.
- Institutions providing secondary training, education or skills must maintain and provide regional AdvancED/SACS accreditation as a secondary public or private school district.
- Provide individual training program information on the cost of attendance, including, but not limited to, tuition, books, and fees.
- Provide student-based information to the Florida Education Training and Placement Information Program (FETPIP) <http://www.fldoe.org/fetpip/>
- Indicate, whether the training program leads to an industry-recognized credential, including recognized postsecondary credential and identify that credential.
- Indicate, whether the credential can be stacked with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder.
- Indicate, whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry).
- Identify the in-demand industry sectors and occupations which best fit with the training program.

- Identify if the training program is credit or non-credit bearing.
- Provide a description of the prerequisites or skills and knowledge required prior to the commencement of training.
- Verify the training program is for an occupation listed on the CSS Targeted Occupation List and meet the minimum required hourly placement wage for the current program year.
- Provide training program completion/placement information to CSS. (Training Programs must meet CSS performance measurer requirements).
 - Those training providers who have reported any of the above information to FETPIP may utilize FETPIP information in their applications.

Note: A provider that receives “Initial Eligibility” under this paragraph for any program shall be subject to all the requirements for that program even after such “Initial Eligibility” expires.

Continued Eligibility

After a training provider has completed the “Initial Eligibility” period of at least one (1) full year, all eligible training providers must submit applications for “Continued Eligibility” every two (2) years to maintain their eligibility. Applications for “Continued Eligibility” must be submitted three (3) months before eligibility expires. Once on the ETPL, the “Continued Eligibility” application is required every two (2) years.

The Continued Eligibility process is published on the CSS website at [Become a Training Provider - CareerSource Suncoast](#). In addition, the application period for submitting Initial or continued ETPL eligibility will be set on an annual basis and will be publicly noticed on the CSS Public Notices page on the CSS Website, [Public Notices - CareerSource Suncoast](#)

The provider shall complete the Continues eligibility application and identify and supply verifiable program-specific performance information pursuant to established State and CSS criteria. To be determined eligible for continuation on the CSS ETPL the training provider must:

- Provide verification the provider is a public school or has maintained licensure by the Florida Department of Education Commission for Independent Education (CIE), or otherwise authorized under Florida law(if Applicable) to provide the proposed training program(s). This applies to in-state and out-of-state providers.
 - Licensure documentation for each course proposed in the application must be provided to CSS.
 - Private training providers must contact the Commission for Independent Education (CIE) at (850) 245-3200 or online at <http://www.fldoe.org/cie/> to obtain licensure.
- Provide a detailed description of each training program being submitted for inclusion on the ETPL, to include but not limited to the following information:
 - The total number of persons enrolled in the program.
 - The total number of CSS program participants enrolled in the program.
 - The total number of persons completing the program.
 - The total number of CSS participants completing the program.
 - The total number of persons awarded a Recognized Postsecondary Credential (or other credential, if applicable)
 - Total number of persons employed after completing the program.
 - Total number of CSS participants employed after completing the program.

- Information on Recognized Postsecondary Credentials (or other credential, if applicable) received by CSS participants.
- Provide a description of how the training services programs serve individuals who are employed and individuals with barriers to employment.
- Provide a description of how the provider will ensure access to training services programs throughout the State, including in rural areas, and through the use of technology (if applicable).
- Institutions providing secondary training, education or skills must maintain and provide regional AdvancED/SACS accreditation as a secondary public or private school district.
- Provide individual training program information on the cost of attendance, including, but not limited to, tuition, books, and fees.
- Provide student-based information to the Florida Education Training and Placement Information Program (FETPIP) <http://www.fldoe.org/fetpip/>
- Indicate, whether the training program leads to an industry-recognized credential, including recognized postsecondary credential and identify that credential.
- Indicate, whether the credential can be stacked with other credentials as part of a sequence to move an individual along a career pathway or up a career ladder.
- Indicate, whether the provider has developed the training in partnership or collaboration with a business or industry (identifying the business or industry).
- Identify the in-demand industry sectors and occupations which best fit with the training program.
- Identify if the training program is credit or non-credit bearing.
- Provide a description of the prerequisites or skills and knowledge required prior to the commencement of training.
- Verify the training program is for an occupation listed on the CSS Targeted Occupation List and meet the minimum required hourly placement wage for the current program year.
- Provide training program completion/placement information to CSS. (Training Programs must meet CSS performance measurer requirements).
 - Those training providers who have reported any of the above information to FETPIP may utilize FETPIP information in their applications.

Note: The training provider that receives “Continued Eligibility” for any program shall be subject to all the requirements for that program even after such “Continued Eligibility” expires. However, Registered Apprenticeship programs who chose to remain on the ETPL are not subject to the “Continued Eligibility” application process.

In addition to the criteria outlined above, The Reimagining Education and Career Help (REACH) Act signed into law and was effective July 1, 2021. The REACH Act requires the Department of Economic Opportunity to set performance standards for training providers for inclusion on the state’s Eligible Training Provider List (ETPL). This included consulting with the Department of Education to set minimum performance standards for programs eligible for enrollment by individuals participating in WIOA for program year (PY) 2021-2022 and adopting rules to implement the requirements of initial and subsequent eligibility criteria for PY 2022-2023.

Rulemaking for initial and subsequent eligibility will be based on input from the state board, local workforce development boards, the Department of Education, and other stakeholders for the Workforce Innovation Opportunity Act (WIOA). Beginning PY 2021-2022, existing programs on the state and local ETPLs must meet the minimum performance criteria outlined in the table below for all three measures to be approved for subsequent (continued) eligibility to remain on the state and local ETPL(s).

A program must have at a minimum 5 participants to determine if they performed successfully, training programs with fewer than five (5) participants will remain on the ETPL until there is sufficient data to determine performance outcomes. Subsequent (Continued) Eligibility Criteria For PY 2021-2022 and so forth, the minimum criteria a program must achieve for completion, earnings, and employment rates of eligible participants are as follows:

| Measures | Definitions | Performance |
|--|---|-------------|
| Completion rate | The percentage of participants who successfully complete the education or training activity when an outcome is recorded in Employ Florida | 60% |
| Median Earnings - 2nd Quarter After Exit | The median earnings of participants who are in unsubsidized employment during the second quarter after exit from the program. | \$4,498 |
| Employment Rate - 4th Quarter After Exit | The percentage of participants who are in unsubsidized employment during the fourth quarter after exit from the program. For youth, the indicator is the percentage of participants in education or training activities, or in unsubsidized employment. | 70% |

ETPL Process and Approval

Upon receipt of the annual Targeted Occupations list for Region 18 provided by the Department of Economic Opportunity, CareerSource Suncoast will disseminate the list to Board members, employer groups and educational partners to solicit and receive comments as to possible additions or deletions using a prescribed format.

After the comment time has passed, and additions/deletions made, CareerSource Suncoast will advertise a "Request for Applications" from training vendors interested in becoming approved training providers for Region 18 through a [Public Notice](#) on the CSS website. The public posting will include but is not limited to, the criteria, process and application submission deadlines in which a training provider can complete the application to [Become a Training Provider - CareerSource Suncoast](#).

Once all applications and information has been received, CSS will conduct a review and verify that all program applications relate to targeted occupations list and assure that minimum criteria outlined in this policy has been met. A data sheet will be compiled listing pertinent information pertaining to the provider and programs submitted. The recommended list will be presented to the full CSS Board of Directors for final approval for the program year.

Note: Approval from the CSS Board of Directors is not required for Registered Apprenticeship Programs to be included on the ETPL.

Once the CSS board of Directors has approved the ETPL, CSS will enter into either an Initial (1-year period) or Continued (2-Year period) Training Provider Agreement. The roles and responsibilities of CSS and the Training Provider are outlined in the Training Provider Agreement.

Registered Apprenticeship Program Inclusion

As previously stated in this Policy, Registered Apprenticeships programs registered under the National Apprenticeship Act with the U.S. Department of Labor, or the Florida Department of Education are exempt from the LTOL requirement, Initial and Continued Eligibility Application procedures and CSS Board approval. An abbreviated Information & Request document and Program

Description must be completed and submitted for Registered Apprenticeship Sponsors who meet this definition and are requesting to be represented on CSSs ETPL. The following documents will be required for completion and submission for review of inclusion on the ETPL:

1. Registered Apprenticeship Information & Request
2. Registered Apprenticeship Program Description
 - a. Complete and submit a separate Program Description form for each training program.
3. Copy of the current Apprenticeship Standards
4. ADA Building/Facility Checklist
5. W-9 Taxpayer Identification Number and Certification

Once the documents have been received and the RA program has been verified, CSS will enter into Registered Apprenticeship Training Provider Agreement. The roles and responsibilities of CSS and the RA program are outlined in the Training Provider Agreement.

Access to the ETPL

The workforce development system established under WIOA emphasizes informed consumer choices, job-driven training, provider performance, and continuous improvement. The quality and selection of providers and training services programs is vital to achieving these core principles. In order to facilitate and assist participants in choosing employment and training activities and in choosing providers of training services program, CSS will publicly post the CSS Board of Directors approved ETPL on the CSS website annually at [Scholarships - CareerSource Suncoast](#).

Exceptions to the ETPL Requirements

There are exceptions, other than RA's, to the required use of the ETPL for ITA funded training. In situations covered by these exceptions, a contract for services may be used to provide for training instead of the ETPL. These exceptions include:

- Work-Based Training such as: On-the-job ("OJT") training, customized training, incumbent worker training, internships, paid or unpaid work experience and transitional employment are not included in the ETPL and therefore are not subject to the eligibility requirements. CSS follows the eligibility criteria for work-based training outlined in the [CareerSource Florida Administrative Policy #100, Work-Based Learning and Work-Based Training for Adults and Dislocated Workers](#) and [CareerSource Florida Administrative Policy #009, On-the-Job Training](#).

ETPL Compliance and Accountability

It is incumbent upon CSS and the training providers to ensure that the ETPL is reported with accuracy and in accordance with State and Federal guidelines.

Compliance

Training Providers are required to notify CSS within five (5) business days, if any of the following occur:

1. Any changes in the acceptance of federal financial aid, cost information, refund practice, etc.
2. Any changes to all required licensing standards and accreditation(s)

Accountability

Inaccurate Information - Upon a determination that a provider of training services programs, or an individual providing information on behalf of the provider, violated this Policy or the WIOA (or title I of the Workforce Investment Act of 1998, as in effect on the day before such date of enactment of WIOA) by supplying inaccurate information, the eligibility of such provider to receive funds shall be

terminated for a period of time that is not less than two (2) years and the provider's program shall be removed from the ETPL for the same length of time. The provider may be excused if the supplying of inaccurate information was unintentional but the burden of proof of that defense is upon the provider.

Substantial Violation - Upon a determination that a provider of training services programs willingly and substantially violated a requirement(s) under this Policy or under the WIOA (or title I of the Workforce Investment Act of 1998, as in effect on the day before such date of enactment of WIOA), the eligibility of such provider to receive funds (as stated in section 122(f)(1)(B), WIOA) for the program involved shall be terminated for a period of not less than two (2) years and the provider's program shall be removed from the ETPL for the same length of time. "Substantial Violation" may be construed to be one or more egregious violations in a short period of time or numerous minor violations over a longer period of time.

Training Provider/Program Removal - A training provider or its programs may be removed for failing to comply with this Policy, WIOA, State of Florida and/or Local Area requirements, or when the training program is no longer needed or desired, or for cause. "For cause" shall include, but not be limited to, engaging in fraud or other criminal acts, incapacity, unfitness, neglect, incompetence, irresponsibility, misfeasance, malfeasance, nonfeasance or lack of performance. Under this section a training provider shall be terminated for a period of not less than two (2) years and the provider's program shall be removed from the ETPL for the same length of time. If a training provider program is removed from the ETPL solely based on performance criteria, the program may be evaluated the subsequent program year to determine if the program has been able to demonstrate the ability to meet performance criteria as outlined in this policy. In the event the program has demonstrated performance, they may reapply with initial program eligibility.

Unlawful Remuneration - An ETP's offer of unlawful remuneration to attract participants shall result in the eligibility of such provider to receive funds under chapter three (3) (as stated in section 122(f)(1)(B), WIOA) for the program involved to be terminated for a period of not less than two (2) years and the provider's program shall be removed from the ETPL for the same length of time.

Repayment - A provider of training services programs whose eligibility is terminated for a violation shall be liable for the repayment of funds received under chapter five (5) of subtitle B of title I of the Workforce Investment Act of 1998, as in effect on the day before such date of enactment, or (as stated in section 122(f)(1)(C), WIOA) during a period of violation as outlined in this policy.

Continued Eligibility" Status May Be Removed - A "Continued Eligibility" provider of training services programs whose eligibility is terminated as a result of a submitting inaccurate information, a substantial violation, or failure to meet performance criteria may lose its status as a "Continued Eligibility" training provider and may be required to reapply as an "Initial Eligibility" training provider, (after the suspension period), during the next program year application period before being allowed to provide services.

Data/ Performance Reporting

Data and Performance reporting are key elements to Initial and Continued eligibility for inclusion on the ETPL.

ETP Reports To FETPIP and Employ Florida

ETPs must report participants' data for each approved program to the Florida Education & Training Placement Information Program (FETPIP) pursuant to section 445.004(9)(e) and the Employ Florida (EF). Florida law requires that educational and workforce training providers report student/participant performance data for each of their training programs to FETPIP. Florida school districts, community

colleges, state colleges and state universities report their data directly to FETPIP. Other institutions that wish to be approved as a WIOA ETP must become licensed with the Commission for Independent Education (CIE), when applicable, which coordinates the gathering and analysis of student performance data with FETPIP. Institutions providing secondary training, education or skills that wish to be approved as a WIOA ETP must maintain regional AdvancED/SACS accreditation as a secondary public or private school district.

Performance Reporting

Training providers' performances in respect to the performance accountability measures and other matters for which information is required under section 122(b)(2), WIOA and outlined in [20 CFR 680.490](#) include:

- Information on the performance of the provider with respect to the following performance accountability measures described in section 116(i)(I-IV), WIOA, for such participants (taking into consideration the characteristics of the population served and relevant economic conditions), and information specifying the percentage of such participants who entered unsubsidized employment in an occupation related to the program, to the extent practicable;
- The percentage of program participants who are in unsubsidized employment during the second quarter after exit from the program;
- The percentage of program participants who are in unsubsidized employment during the fourth quarter after exit from the program;
- The median earnings of program participants who are in unsubsidized employment during the second quarter after exit from the program;
- The percentage of program participants who obtain a recognized postsecondary credential, or a secondary school diploma or its recognized equivalent during participation in or within 1 year after exit from the program. (For the purposes of this clause, program participants who obtain a secondary diploma or its recognized equivalent shall be included in the percentage counted only if such participants, in addition to obtaining such diploma or its recognized equivalent, have obtained or retained employment or are in an education or training program leading to a recognized postsecondary credential within one (1) year after exit from the program.)

Out-of-State Training Providers

Out-of-state postsecondary training institutions that are not operating within the State of Florida and are not required to be licensed by the Florida Commission for Independent Education (CIE) must provide the following information to each Local Board with which it wishes to do business:

- Information outlined in this Policy for "Initial Eligibility" or for "Continuing Eligibility" and performance information for each program for which it seeks approval, and;
- Evidence that the institution (and applicable programs) is accredited by an accreditation agency approved by the United States Department of Education, and;
- Evidence that the institution meets the licensing requirements of its home state, and;
- Evidence that the institution is on its state's Eligible Training Provider List.

In order to provide performance information for its programs, out-of-state providers are required to report their student completion data to FETPIP to the extent feasible under established reporting mechanisms.

Appeals

For an appeal from any decision made by CSS, the appellant shall follow the appeals procedure established in the CSS Policy #09-21, Client Grievance and Reporting Policy and Procedure.

For an appeal from any decision made at the State level, the appellant shall follow the appeals procedure established by DEO.

Attachments:

- None

Authority:

[Training and Employment Guidance Letter No. 10-16, Change 1 | U.S. Department of Labor \(dol.gov\)](#)

[Training and Employment Guidance Letter No. 08-19 | U.S. Department of Labor \(dol.gov\)](#)

[Requirements for Training Providers, Program Eligibility, and the State Eligible Training Provider \(ETP\) List in the Workforce Innovation and Opportunity Act \(WIOA\) Section 122 and 20 CFR part 680 \(dol.gov\)](#)

[Eligible Training Provider \(ETP\) List Requirements and Responsibilities \(dol.gov\)](#)

[Eligible Training Provider \(ETP\) Eligibility Policy Checklist \(dol.gov\)](#)

[Registered Apprenticeship Program \(RAP\) Required Information for ETP List \(dol.gov\)](#)

[eCFR :: 20 CFR 680.450 -- What is the initial eligibility process for new providers and programs?](#)

[eCFR :: 20 CFR 680.460 -- What is the application procedure for continued eligibility?](#)

[eCFR :: 20 CFR 680.470 -- What are the procedures for including and removing registered apprenticeship programs on a State list of eligible training providers and programs?](#)

[Training and Employment Guidance Letter No. 13-16/ U.S. Department of Labor \(dol.gov\)](#)

[Training and Employment Guidance Letter No. 13-16, Change 1/ U.S. Department of Labor \(dol.gov\)](#)

[Department of Economic Opportunity Reimagining Education and Career Help Act \(House Bill 1507 and Eligible training Provider Eligibility Memorandum](#)

[Workforce Innovation and Opportunity Act \(WIOA\), Sections 122, 133](#)

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

[Florida Statutes, Chapter 445 – Workforce Innovation FS Chapter 1005](#)

[Florida Statutes, Chapter 1008 – Florida Education and Training Placement Information Program](#)

[Commission for Independent Education Florida Administrative Code, Chapter 6E](#)

[CareerSource Florida Administrative Policy #100, Work-Based Learning and Work-Based Training for Adults](#)

[CareerSource Florida Administrative Policy #009, On-the-Job Training](#)

[CareerSource Florida Administrative Policy #090, WIOA Eligible Training Provider List](#)

Supersession:

This policy supersedes and replaces Policy and Procedure #11-01 Procurement and Approval of Training Vendors and Programs dated 01/10/2014.

Inquiries:

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

DRAFT

CAREERSOURCE SUNCOAST
Related Party Agreements
Board of Directors Summary Report
March 23, 2023

Background Information:

CareerSource Suncoast and the Department of Economic Opportunity's grantee-sub-grantee agreement provides clear guidance and rules in regard to related party contracts. These rules ensure transparency and accountability, prevent impropriety or the appearance of impropriety in public business, and limit the possibility of the improper expenditure of state or federal funds. "Related Party" includes any: Board member; Board employee or staff; relative of any Board member, employee or staff; any organization represented by or employing a Board member, employee or staff; any organization, the board of directors of which a Board member or employee or staff holds a board position; or any vendor with which a Board member has a relationship.

Any member of the Board of Directors must abstain from discussion and voting if they meet the definition outlined above.

Related Party Agreements/Amounts:

The following approvals are for the organization to enter into a worksite agreements for CSS enrolled clients participating in work-based learning (i.e., paid work-experience) and/or work-based training (i.e., OJT, CT, IWT).

- Boys and Girls Club of Manatee County, \$25,000 maximum for PY2023-2024
- Sun Hydraulics Corporation, \$25,000 maximum for PY2023-2024
- Boys and Girls Club of Sarasota County, \$9,995 maximum for PY2022-2023 and \$25,000 maximum for PY2023-2024

Requested Action:

A motion for the Board of Directors to approve the Related Party agreements for PY 2023/2024 at a maximum of \$25,000 with the Boys and Girls Clubs of Manatee County.

A motion for the Board of Directors to approve the Related Party agreements for PY 2023/2024 at a maximum of \$25,000 with Sun Hydraulics Corporation.

A motion for the Board of Directors to approve the Related Party agreements for PY 2022/2023 at a maximum of \$9,995 and PY 2023/2024 at a maximum of \$25,000 with the Boys and Girls Clubs of Sarasota County.

Respectfully submitted,

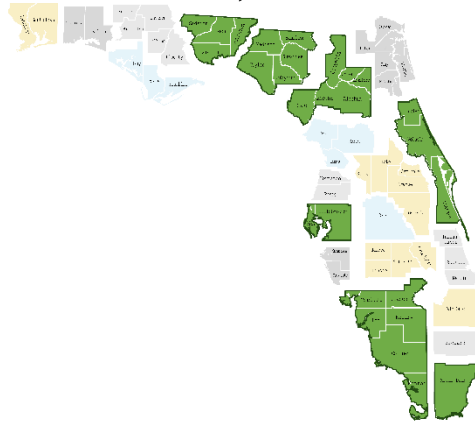
Christina Witt
Organizational Support Services Director



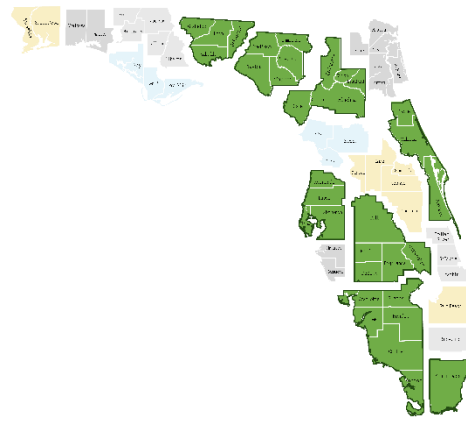
CEO Report

mirror those suggested in the prior two options. This potential option suggests consolidating full area 11 and area 13. This option would also further consolidate area 14, area 15, and full area 16 to unite the Tampa Bay MSA into one local workforce development area.

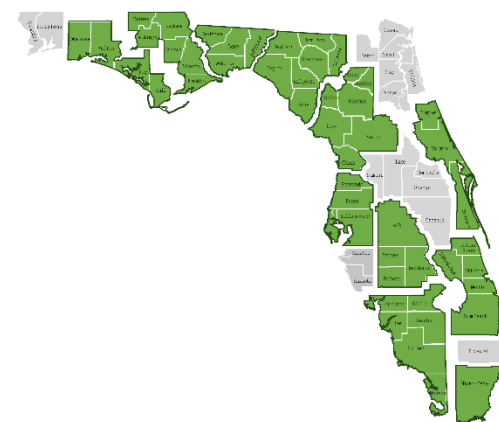
Map reflecting potential reduction to 21 local workforce development boards



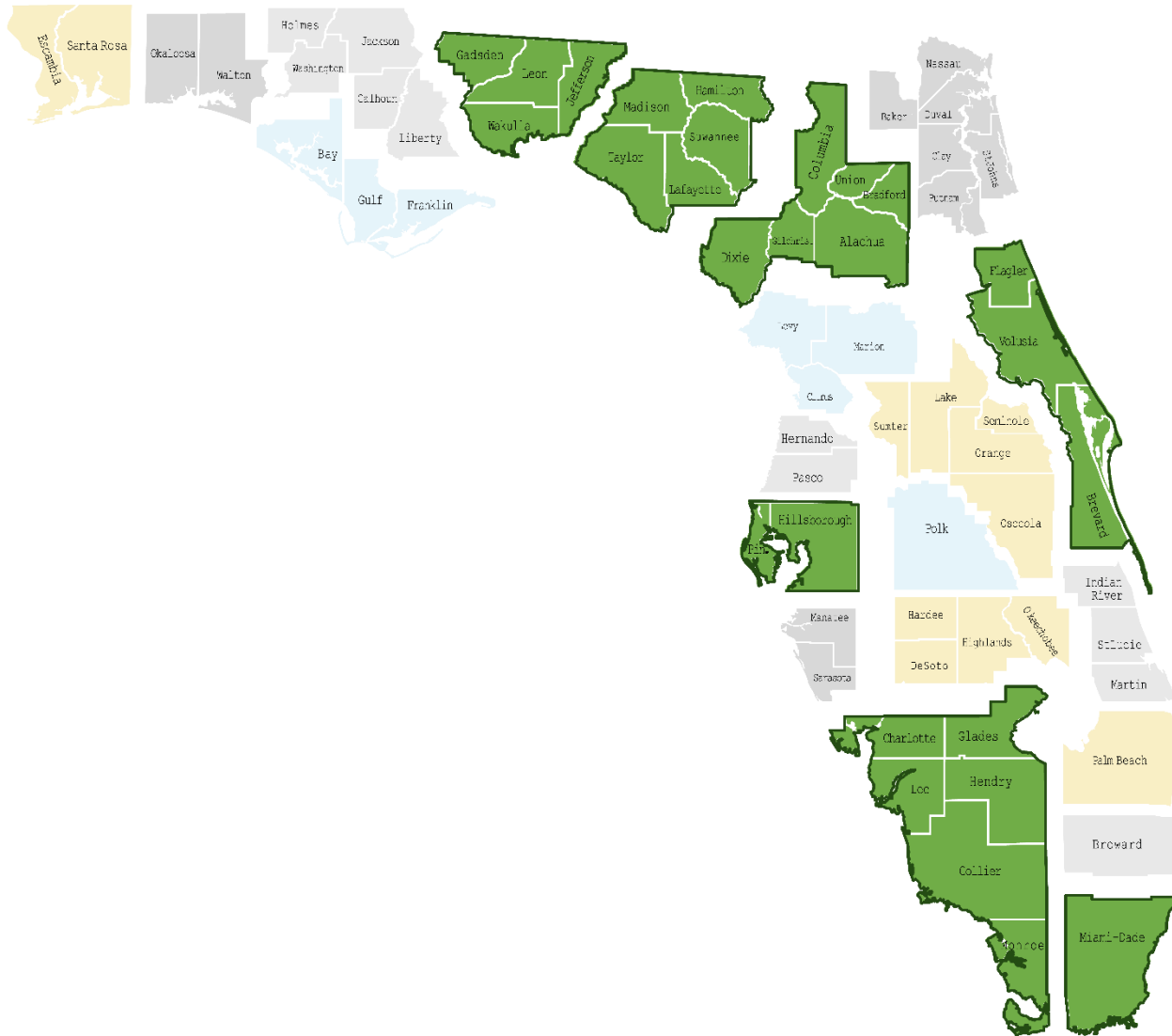
Map reflecting potential reduction to 19 local workforce development boards



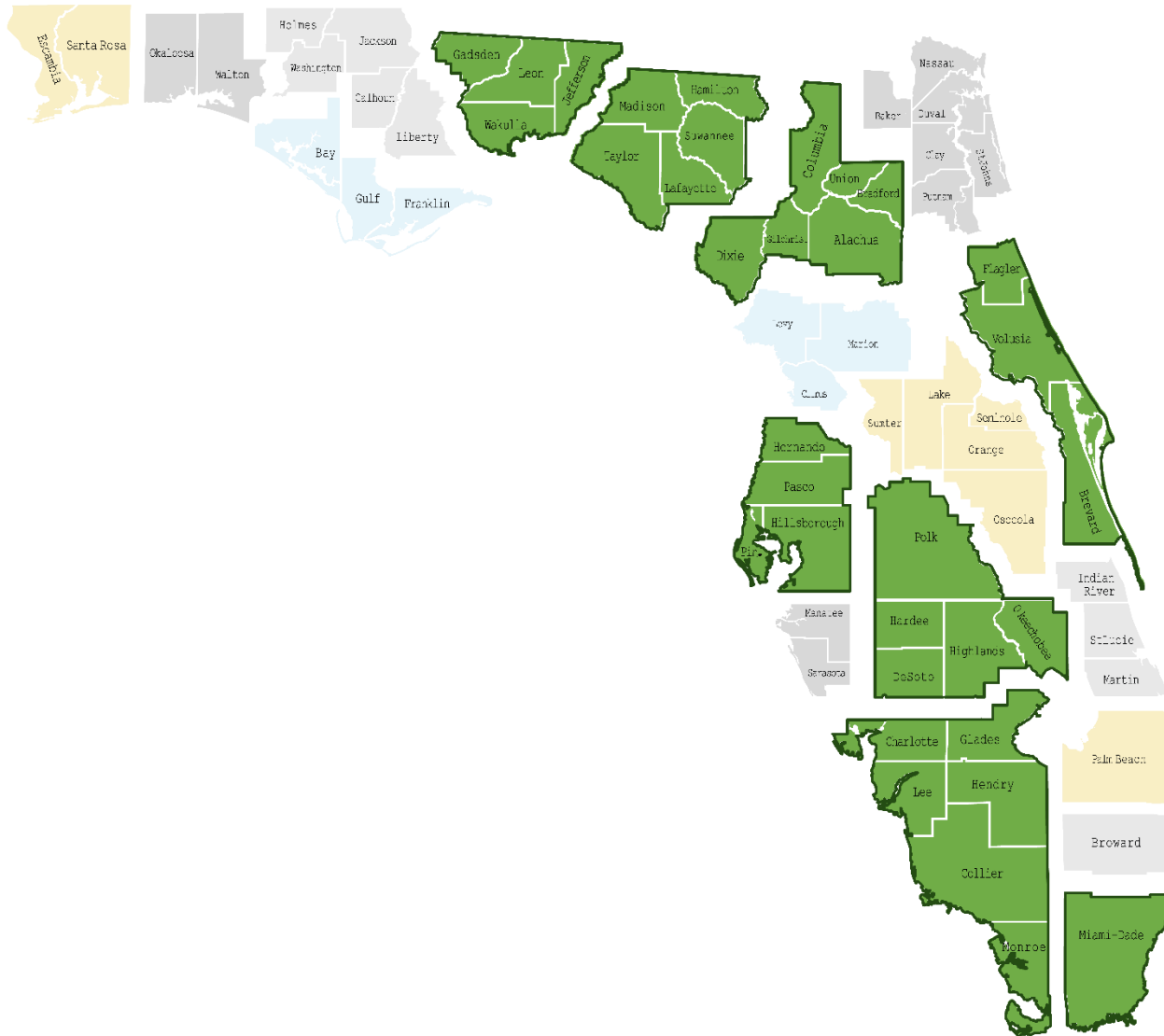
Map reflecting potential reduction to 16 local workforce development boards



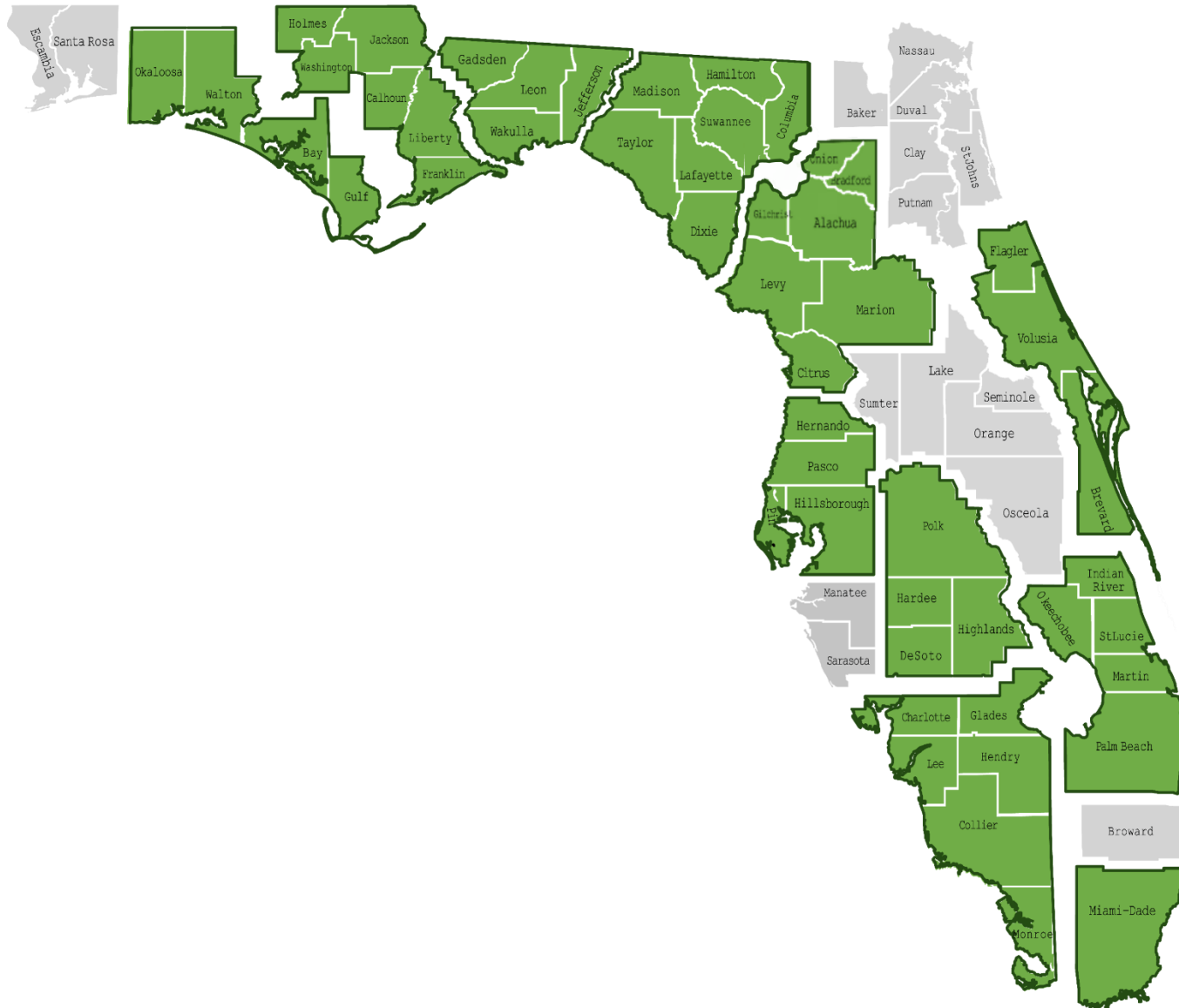
OPTION 21

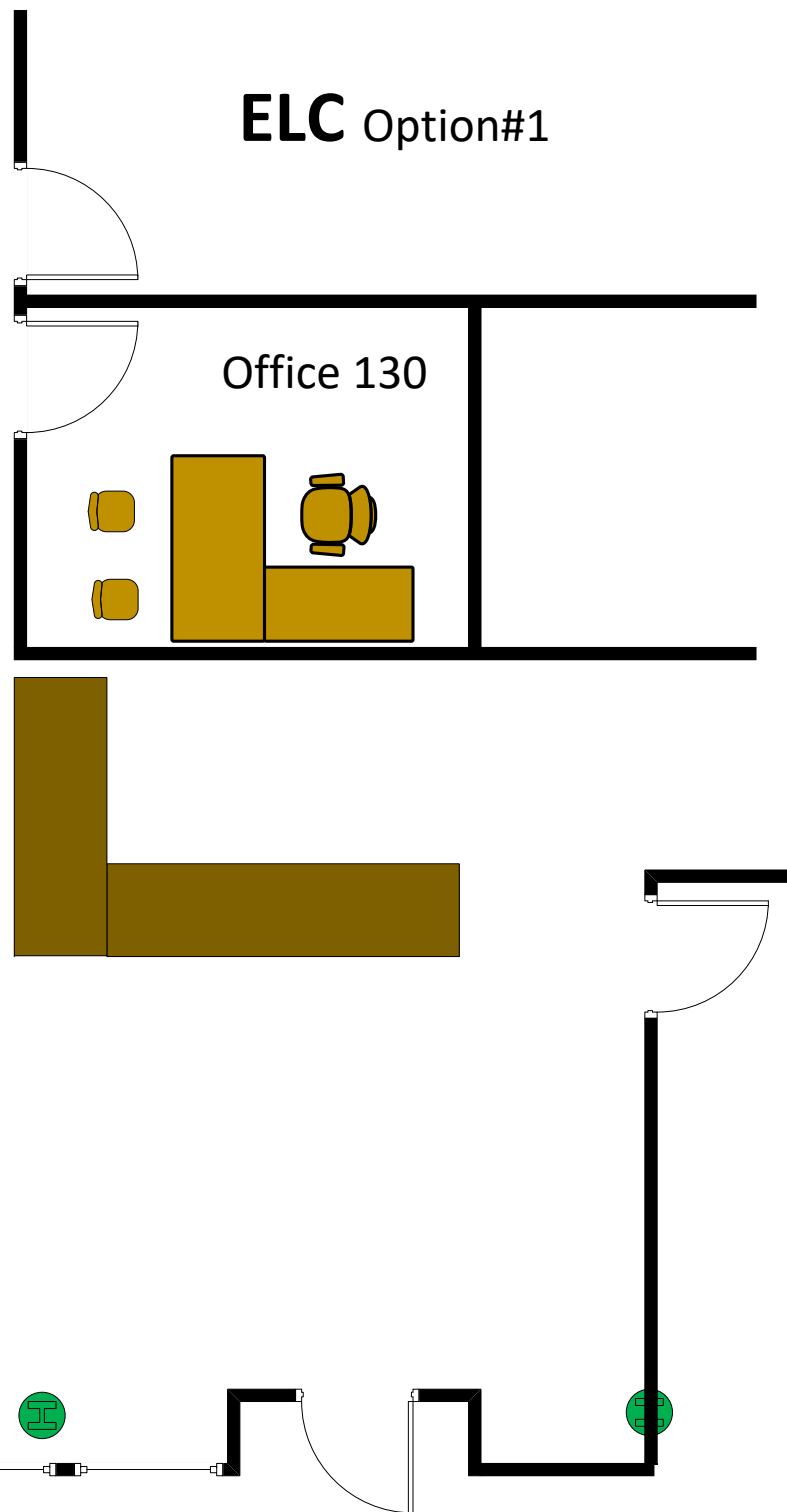
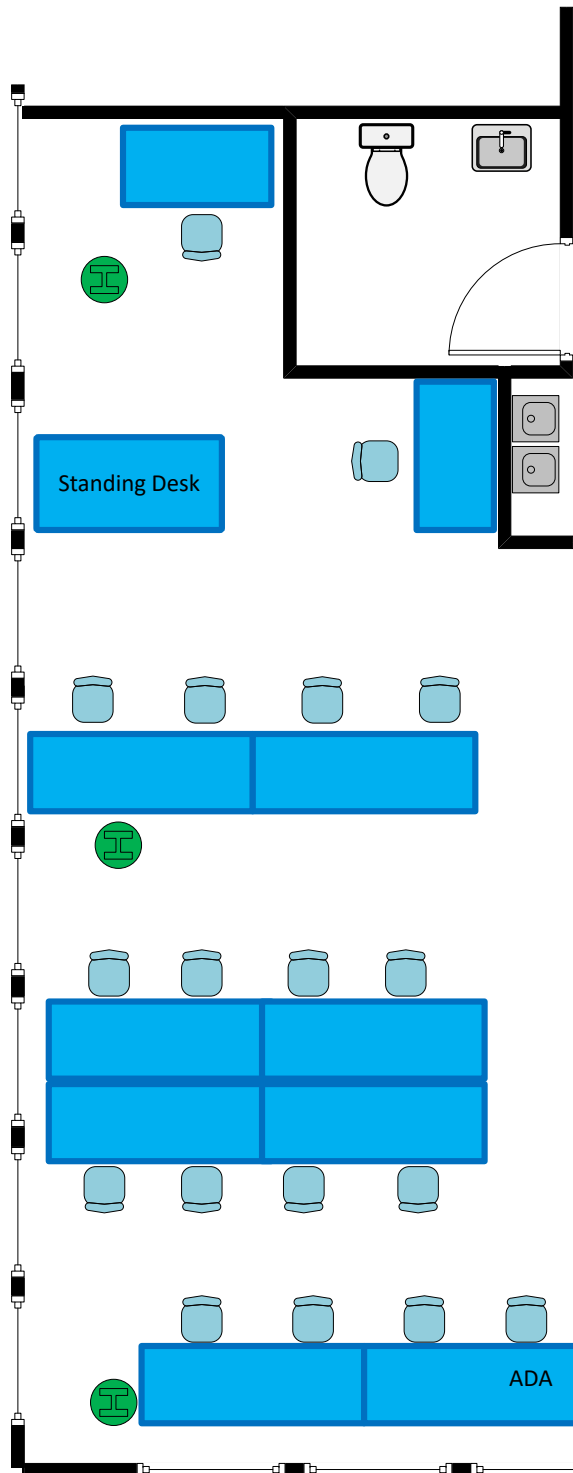


OPTION 19



OPTION 16







OTHER BOARD BUSINESS



**CareerSource Suncoast
Board of Directors' Annual
Refresher Training
March 23, 2023**

Welcome!

Facilitators: CSS Leadership Team

- The Purpose of the LWDB
- Florida's Workforce Development Goals and Strategies
 - State and Local
- Roles and Responsibilities
- How the Workforce System is Funded
- Performance Requirements
- Florida's Sunshine Law Requirements
- Conflict of Interest Policy



Florida's Local Workforce Development Board's Purpose

- Enhance the Capacity of the System
- Align and Improve Program Outcomes
- Promote Economic Growth
- Engage Business and other Stakeholders
- Support achievement of the State's Vision and Goals



Florida's Workforce Development Goals

- Integrated Service Delivery
- Strategy
- Regional Economic Development
- High-Quality Services
- Accountability and Transparency



CareerSource Florida Workforce Strategies

- CSF Strategic Plan
 - [2020-2024 Workforce Innovation and Opportunity Act Unified Plan \(careersourceflorida.com\)](https://careersourceflorida.com)
 - Objectives:
 - Implementing Sector Strategies
 - Career Pathways
 - Expanding Apprenticeship Opportunities
 - Enhancing Performance Measurement
 - Quality Services for People with Disabilities

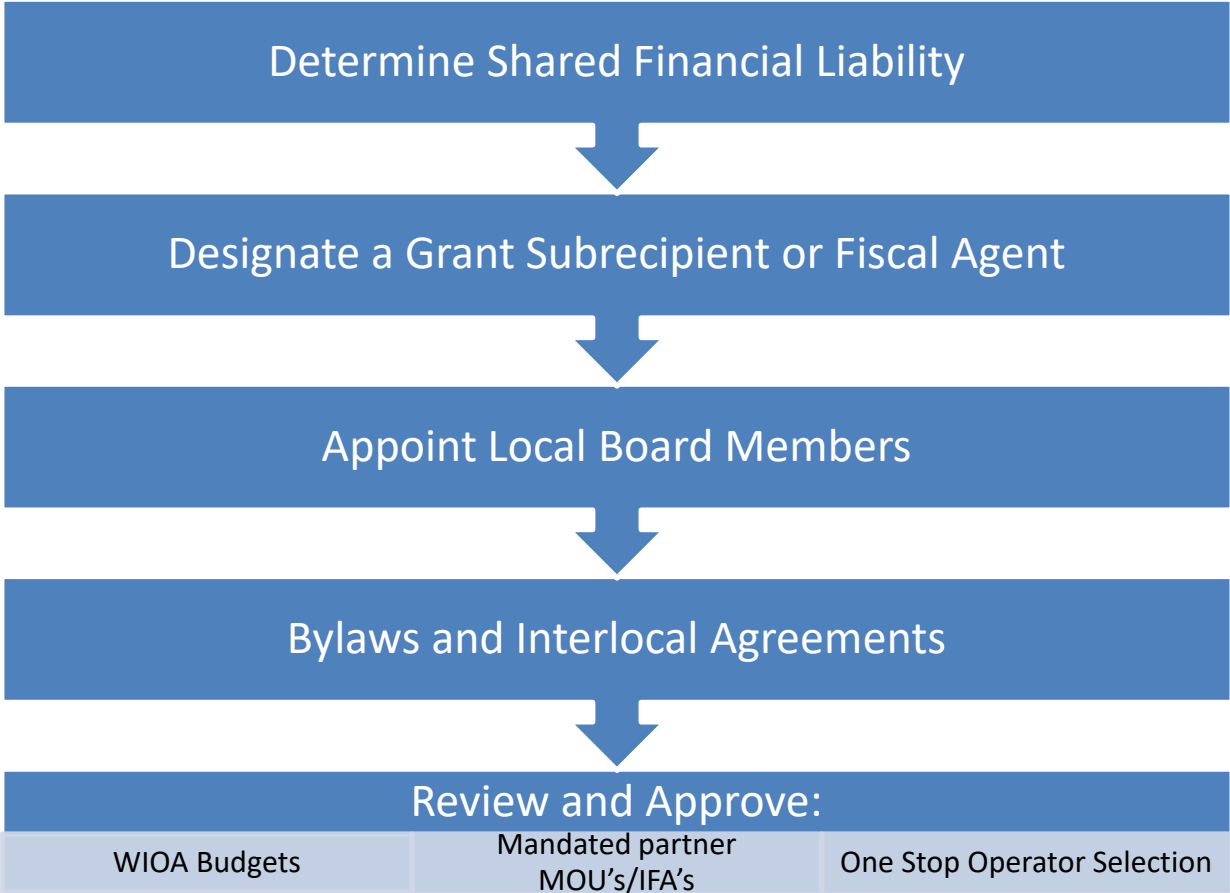


CareerSource Suncoast Strategic Plan

- CSS Strategic Plan
 - [CSS-2020-2025-Strategic-Plan.pdf](https://careersourcesuncoast.com/CSS-2020-2025-Strategic-Plan.pdf)
(careersourcesuncoast.com)
- Objectives:
 - Employer Focus
 - Regional Convening
 - Storytelling
 - Entrepreneurial Mindset
 - Continuous Improvement



Chief Elected Officials Roles and Responsibilities



CareerSource Suncoast Board of Director Chair

- Elected by the Members of the Board
- Private Business Sector
- Roles and responsibilities
 - Directed by CSS Bylaws



CareerSource Suncoast President/Chief Executive Officer

- Hired by the Board of Directors
- Roles and Responsibilities
 - Directed by CSS Bylaws



CareerSource Suncoast Board Roles And Responsibilities



Convener

- Convene partners and other stakeholders to identify and achieve shared goals

Strategist

- Develop strategies to meet the needs of the jobseekers and employers

Manager

- Board provides overall Management of the workforce system

Optimizer

- Works to achieve maximum results in the local area

CareerSource Suncoast Staff Roles and Responsibilities

- Fiscal Agent Designated by the CLEOs
- Assist Job Seekers
- Connect Employers with Skilled workers
- Coordination of Services with Partners and Stakeholders



How the Workforce System is Funded

U.S. Department of Labor

U.S. Department of Agriculture

U.S. Dept. of Health and Human Services



WIOA Performance Requirements

- Programs
 - Adults/Dislocated Workers
 - Youth
 - Wagner Peyser
- Credential Attainment
- Measurable Skills Gain
- Employment/Median Wage
 - Second Quarter after exit
 - Fourth Quarter after exit



Florida's Sunshine Law Requirement

- [Public Meeting and Public Record Requirements - FloridaJobs.org](http://FloridaJobs.org)
- Assures Open Government
 - Two or more Board members cannot discuss Board business
- Formal or Informal Gatherings
- Public Access
 - Meetings
 - Notification
 - Agendas
 - Posted on CSS website
 - Minutes
 - Posted on CSS website



Conflict of Interest

- Conflict of Interest Policy # 06-21
- Purchasing and Procurement Policy #02-21



Questions?



Thank You!
Facilitators: CSS Leadership
Question or Comments
Email: cwitt@careersourcesc.com



STAFF REPORTS



Kathy Bouchard
VP/CTO



Robin Dawson
VP/CFAO

CareerSource Suncoast
Request for Extension to Provide Direct Services

As the Local Workforce Development Board for Area 18, Suncoast Workforce Board, Inc., doing business as CareerSource Suncoast (CSS), is hereby applying to extend its designation as a direct service provider of certain workforce services.

1. A review of how the provision of direct services during the prior period fit the business model that the local workforce development board (LWDB) proposed in its original request, and any proposed changes in the business model or the particular workforce services the LWDB intends to provide during the extension period.

The original business model proposed at start-up of direct service provision allowed for more direct communication between administrative staff and program staff in the career centers. With more direct accountability, program managers quickly realized the need to train and improve overall staff skill levels and customer service. Previously, sub-contractors claimed to provide expertise in all program areas but proved ineffective. However, the original model left program silos in place, and had a Chief Operating Officer (COO) with the service provider and Board. Several interim models were tested that would have created additional senior management positions, but this ran contrary to the intent of consolidating functions and increasing efficiencies.

Administrative and Financial functions have been consolidated into one position of Chief Financial & Administrative Officer (CFAO), and program operations under one Chief Operating Officer. This eliminated two positions -- a COO with the service provider and an administrative officer. Team structure, priorities, and policies are evaluated continuously to ensure best use of resources. As the direct provider of services, CSS continues the process of training career center staff to be proficient in all programs. This provides a better client experience and allows for staff to shift to areas as funding increases or decreases. As a direct provider of services, CSS is aligned to change quicker and easier to workforce needs in our local area, reduce costs, provide consistent staff training and integration within the career centers. CSS's goal is to provide the best client experience for both the employer and job seeker.

2. The effective date for when the extension would begin.

July 1, 2023 is the effective date for the extension.

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

The extension would be in effect, for the allowed 3-year period, through June 30, 2026.

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

As stated in the original application, over a 10-year period, CareerSource Suncoast had procured both private non-profit and for-profit organizations to operate the One-Stops and provide services. Direct and indirect compensation or fees to other organizations reduced the amount of funding available to provide training and support to clients.

CareerSource Suncoast continues to remain dedicated to continuous improvement focusing on customer service and outcomes, streamlining processes and services, improving organizational

structure, innovation on program delivery, and delivering quality services and support to CSS job seekers and businesses in the local area.

5. A review of the effectiveness of the firewall established by the LWDB to clearly separate existing roles as oversight body for the region's workforce delivery system and its role as the operational services directly provided by the RWB, and an explanation of changes to be made to the firewall.

The business model now in place clearly separates administrative and oversight functions from the program and operating functions through CareerSource's Leadership Team which consists of the Chief Executive Officer, Chief Operating Officer, Chief Financial and Administrative officer, and Chief Talent Development Officer. This Leadership Team along with the Directors set goals for the staff and for each of the career centers. Directors report to the leadership team on the operations in the career centers. The Leadership Team reports to the CSS Committees and Board of Directors.

CSS maintains a strong internal monitoring process with good internal controls. A Quality Assurance Manager provides ongoing monthly programmatic monitoring. CSS contracts services with independent vendors to conduct annual financial audits and monitoring. Our policies reflect internal controls and accountability for our employees, directors and managers. Our internal controls are reviewed annually to ensure effective firewalls are in place. Performance and financial audits/monitoring are shared with the Finance/Performance Committee, the Commissioners Coordinating Council, Executive Committee, and full Board of Directors providing oversight to these functions.

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

- Workforce Innovation and Opportunity Act (WIOA) Adult, Youth, and Dislocated Worker
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program, Employment & Training (SNAP)
- Reemployment Services and Eligibility Assessment (RESEA)
- Wagner-Peyser Employment Services (WP) - Jointly managed DEO & CSS
- Disabled Veterans Outreach Program (DVOP) - Jointly managed DEO & CSS
- Local Veterans Employment Representative (LVER) - Jointly managed DEO & CSS
- Trade Adjustment Assistance Training Services (TAA) – Jointly managed DEO & CSS

7. An analysis of the costs of the services that documents the actual reduction in costs with the LWDB providing the services rather than contracting that service to another provider, and an estimate of such costs and savings for the upcoming period.

CSS develops an annual budget to effectively manage and sustain the CSS programs operations. The ability to be direct providers of services has allowed CSS to minimize administrative and overhead cost and prevent duplication of staff positions. This allows CSS to redirect more funding to program services. These past three program years; 2020-2021, 2021-2022, and 2022-2023 CSS has saved an additional **\$1,345,203** in profit and overhead costs that would have gone to the service provider and left the region and state. These funds have been reinvested in the local workforce region by increasing funds available for occupational skills training and work-based training funds, and providing services to local employers. Local Workforce Development Board - CareerSource Suncoast #18 is a private, non-profit 501(c)3, with administrative costs limited to 10%, and no profit.

Refer to the attached **Exhibit “A”** spreadsheet for more details regarding the realized savings.

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

Direct operation of programs and services has given CareerSource Suncoast the flexibility to respond quickly to the business community and needs of our local area. It has allowed us to innovate quickly and create new programs. CSS has cross trained coaches to work with multiple workforce programs to better service clients and produce improved outcomes.

During the current 2022-23 program year as of February 23, 2023, CareerSource Suncoast has provided 3,063 services to 790 different employers. The year prior (July 1, 2021 to June 30, 2022), CareerSource Suncoast staff assisted 1,730 different employers with 3,759 services via Employ Florida. This puts CSS on track to exceed the number of services provided with more than a quarter remaining in the year.

Currently in PY2022-23, CareerSource Suncoast has entered 49 job orders into Employ Florida and reviewed an additional 1,287 entered by employers. For the program year 2021-22, CareerSource Suncoast staff created 75 job orders in Employ Florida and reviewed an additional 900 entered directly by employers.

CareerSource Suncoast has been increasingly successful in placing customers in employment, including training related employment. In the first two quarters of program year 2022-23, CareerSource Suncoast has provided 6,743 Career Seeker services. CSS continues to provide quality services to those who have barriers to employment.

Funding previously lost to an out-of-state provider through indirect charges and profit rates is now being invested locally, allowing us to increase employer outreach with designated Business Services Staff. CSS has enhanced our relationships with the local economic development corporations. The Incumbent Worker (IWT), Customized Training (CT) and On the Job Training (OJT) funds have been used to deliver training in the region. Over the years, we have continually helped to increase the number of employed workers receiving skills training and providing on the job training grants. Upgrading skills at existing businesses keeps them strong and competitive and has helped with retention, wage increases, and to put many job seekers to work. Additionally, the CSS Apprenticeship Navigator, continues to build employer relationships with a focus on developing and expanding apprenticeship opportunities in the region.

During the past year CSS has:

- Reduced the number of findings during DEO programmatic monitoring.
- Consistently having no findings or observations with DEO Financial Monitoring.
- Continuously clean independent financial audits.
- Consistently exceeds the out-of-school youth and paid-work experience expenditure requirements.
- Exceeded the Individual Training Account expenditure rate requirement.
- See graphic below for recent performance metrics for the first quarter for PY2022-23, where CareerSource Suncoast has met or exceeded most of the performance measures.

LWDB 18

| Measures | PY2021-2022 4th Quarter Performance | PY2021-2022 % of Performance Goal Met For Q4 | PY2021-2022 Performance Goals | PY2022-2023 1st Quarter Performance | PY2022-2023 % of Performance Goal Met For Q1 | PY2022-2023 Performance Goals |
|------------------------------------|-------------------------------------|--|-------------------------------|-------------------------------------|--|-------------------------------|
| Adults: | | | | | | |
| Employed 2nd Qtr After Exit | 90.00 | 94.74 | 95.00 | 88 | 97.13 | 90.60 |
| Median Wage 2nd Quarter After Exit | \$12,636 | 127.64 | \$9,900 | \$ 11,996 | 128.29 | \$9,351 |
| Employed 4th Qtr After Exit | 90.30 | 95.05 | 95.00 | 91.7 | 105.40 | 87.00 |
| Credential Attainment Rate | 71.40 | 85.00 | 84.00 | 84.5 | 108.33 | 78.00 |
| Measurable Skill Gains | 71.10 | 129.27 | 55.00 | 76 | 103.54 | 73.40 |
| Dislocated Workers: | | | | | | |
| Employed 2nd Qtr After Exit | 71.60 | 75.37 | 95.00 | 71.7 | 92.40 | 77.60 |
| Median Wage 2nd Quarter After Exit | \$9,615 | 114.46 | \$8,400 | \$ 9,692 | 96.17 | \$10,078 |
| Employed 4th Qtr After Exit | 85.70 | 95.22 | 90.00 | 100 | 149.25 | 67.00 |
| Credential Attainment Rate | 18.80 | 26.86 | 70.00 | 25 | 42.81 | 58.40 |
| Measurable Skill Gains | 80.60 | 164.49 | 49.00 | 76.9 | 108.16 | 71.10 |
| Youth: | | | | | | |
| Employed 2nd Qtr After Exit | 62.50 | 69.44 | 90.00 | 57.5 | 69.28 | 83.00 |
| Median Wage 2nd Quarter After Exit | \$7,625 | 125.00 | \$6,100 | \$ 7,065.00 | 159.48 | \$4,430 |
| Employed 4th Qtr After Exit | 75.00 | 78.95 | 95.00 | 75 | 108.70 | 69.00 |
| Credential Attainment Rate | 77.80 | 101.70 | 76.50 | 87.5 | 108.43 | 80.70 |
| Measurable Skill Gains | 66.70 | 121.27 | 55.00 | 61.9 | 91.03 | 68.00 |
| Wagner Peyser: | | | | | | |

Best Practices That Could Be Shared With Other Regional Workforce Boards

By directly administering state-level grant awards, we have been able to select quality professionals to develop innovative projects and continuously leverage community partners and relationships. We have had many successes that can be deemed best practices:

Apprenticeship

CareerSource Suncoast sought to better understand apprenticeship in 2017 so we began working with CareerSource Florida and its partner Jobs for the Future to help implement them further in our region. We identified our largest private employer and biggest manufacturer, PGT, who had already begun investigating apprenticeships as a workforce solution. Together, we registered a sponsorship for Tool & Die Makers with CareerSource Suncoast as the sponsor in April 2018. We became the first workforce region in the state to sponsor an apprenticeship and have shared our best practices on numerous calls and twice at the annual workforce summit as a panelist.

CSS continues to work with local employers in an effort to develop and/or expand apprenticeship programs in the local area.

THRIVE

CareerSource Suncoast implemented a small business accelerator and entrepreneurial services called THRIVE in July of 2018. THRIVE combines the space and knowledge for individuals in our community to build and grow their own enterprises. THRIVE has coworking space and fully furnished offices to allow entrepreneurs to have a professional space rather than working from home or the local coffee shop. More importantly, THRIVE is delivering education to sole proprietors and small business owners through workshops, online seminars and virtual curriculum.

CareerSource Suncoast had been a partner in the Community Entrepreneur Opportunity (CEO) program for a decade as the nonprofit fiscal agent. Through THRIVE, CareerSource Suncoast now delivers this 10-week free course twice a year to individuals looking to start a small business. THRIVE staff provides counseling and 1-on-1 coaching as well as referrals to other resources for these small businesses.

CSS's **THRIVE**, is an affiliate of the [Ewing Marion Kauffman Foundation](#) and partners with the Small Business Development Center (SBDC), Service Corp of Retired Executives (SCORE), Woman's Resource Center/Sarasota, Fifth Third Bank, Wells Fargo Bank, City of Sarasota, and the Greater Sarasota Chamber of Commerce.

Additional offerings include the Accelerate to Success program. This is a second 10-week course for CEO/Platform for Success graduates. The primary goal is to help individuals launch their business. These fast-paced 45-minute sessions are packed with novel business ideas, trends, and best practices designed to businesses succeed.

In 2020, THRIVE launched a weekly segment called From the Bench, live streaming content and engaging our members in topics most relevant to entrepreneurs. From the Bench are weekly drop-in 1-hour workshops featuring topics that can have a positive influence on running a small business. Subject matter experts lead discussions providing the perfect setting for creative conversations about real-world challenges and solutions.

Additionally, CSS holds an annual [eRising](#) conference in-person and online, bringing together the region's most connected minds on entrepreneurship under one roof. A distinguished panel of experts offer their perspectives on critical components needed by those seeking to start or grow their business.

Agency-to-Agency Referral System

CareerSource Suncoast developed the Crosswalk system to make confidential referrals with mandated and community partners. The online system now encompasses 14 Local Workforce Development Boards (38 Counties total) around the state of Florida along with 141 agencies around the state within those regions. The goal is to make referrals between agencies to get individuals the services they need. It's a helpful tool to ensure the region is following the support services policy and seeking assistance from agencies first before using workforce dollars for support. An update for the coming year will allow employers access to ensure that they can make referrals for their employees who may need help with food, clothing and shelter. The system is searchable by service within the specific county where the client resides.

| |
|--|
| 9. Documentation that the public was provided a meaningful opportunity for review and comment on the proposed extension for a period not less than 10 days. Any submitted comments must be included. |
|--|

Our notice of intent to apply for an extension of our designation as direct provider of workforce services was published on our website, careersourcesuncoast.com, beginning March 02, 2023 allowing for the 10-day comment period. The CSS Board of Directors received an email notification on March 02, 2023. No Comments were received by the close of the comment period. Refer to the attached **Exhibit "B"** for supporting documentation of public posting.

10. Request for Extension Form for signatures:

REQUEST FOR EXTENSION

| LOCAL WORKFORCE AREA INFORMATION | |
|--|------------------------|
| Name of Local Area: | CareerSource Suncoast |
| LWDB Number: | #18 |
| Date of Submission: | |
| Contact Person Name: Robin Dawson, CFAO rdawson@careersourcesc.com | Phone: 941-209-1898 |
| AMENDMENT TO THE LOCAL WORKFORCE SERVICES PLAN | |
| <p>The Local Workforce Development Board seeks to extend its designation as a direct service provider of certain services by agreement of the Chief Elected Official and the Governor. This extension to the designation of the Local Workforce Development Board as a direct service provider of certain services is to be effective for the period <u>7/1/2023</u> through <u>6/30/2026</u>.</p> <p>The signatures below certify agreement to the request for extension submitted by the Local Workforce Development Board and the assurance that the Local Workforce Development Board will operate in accordance with this extension, its Workforce Service Plan, and applicable federal and state laws and regulations.</p> | |

| LOCAL WORKFORCE DEVELOPMENT BOARD CHAIRMAN | |
|---|---|
| Name: Eric Troyer | Title: CPA/Partner – Kerkering Barberio |
| Signature: | Date: |

| LOCAL CHIEF ELECTED OFFICIAL | |
|--|-----------------|
| Name and Title: George Kruse, Commissioner | County: Manatee |
| Signature: | Date: |

LOCAL CHIEF ELECTED OFFICIAL

Name and Title: Joe Neunder, Commissioner

County: Sarasota

Signature:

Date:

CareerSource Suncoast
 LWDB #18
 Cost Savings from LWDB Providing Direct Services
 PY 2020-2021, 2021-2022, and 2022-2023

EXHIBIT A

| | PY 2020-2021 | | PY 2021-2022 | | PY 2022-2023 | |
|--|----------------------|---|----------------------|---|----------------------|---|
| | Overall Expenditures | Expenditures IF Wkfrc Svcs Under Contract | Overall Expenditures | Expenditures IF Wkfrc Svcs Under Contract | Overall Expenditures | Est Expenditures IF Wkfrc Svcs Under Contract |
| Total Personnel Costs | \$3,987,974 | \$3,355,174 | \$4,179,643 | \$3,546,843 | \$3,905,732 | \$3,272,932 |
| Facility Costs | \$942,110 | \$0 | \$878,257 | \$0 | \$903,044 | \$0 |
| Office Furniture & Equipment | \$99,205 | \$0 | \$31,308 | \$0 | \$91,949 | \$0 |
| Operating Costs | \$203,768 | \$90,832 | \$268,730 | \$143,934 | \$268,746 | \$142,000 |
| Total Program Services | \$1,462,068 | \$267,697 | \$1,464,831 | \$217,971 | \$1,931,763 | \$172,643 |
| Totals | \$6,695,125 | \$3,713,703 | \$6,822,769 | \$3,908,748 | \$7,101,234 | \$3,587,575 |
| Profit & Overhead on a Direct Services Contract | | 12% | | 12% | | 12% |
| Cost Savings for Providing Direct Svcs fr Profit & OH | | \$445,644 | | \$469,050 | | \$430,509 |
| Total Cost Savings from Profit & OH for 3 Years | | | | | | \$1,345,203 |

Exhibit B- Public Notice

Document was posted on the CSS Website for public comments from 03/02/2023- 03/12/2023

No Comments were received

Public Notice information was emailed to the CSS board of Directors and Mandated Partners.

https://careersourcesuncoast.com/public-notice/

Administrative Polic... GSAFSD Tier 0 Kno... Digital Verification... mipcloud - AWS Ap... CIP user site Regional Demand... SAM.gov | Home Discriminatory Ven... CareerSource Florid... ETA Advisories, Em... Other favorites

Careers Employers Entrepreneurs Ticket to Work Veterans Scholarships

Public Notices

About Us

- Board of Directors
- Agendas and Minutes
- Public Notices
- Public Records
- Policies
- Become a Training Provider
- History and Mission

Stevens Amendment

CareerSource Suncoast is committed to fulfilling our mission with integrity, accountability and transparency. If you cannot find what you're looking for here, visit our [Public Records](#) page, [Policies](#) page, or send us an email. CareerSource Suncoast is 100% supported by the Employment & Training Administration of the U.S. Department of Labor, Health & Human Services, and Agriculture as part of awards totaling \$9,323,456

Local Workforce Development Board (LWDB) Request for Extension to Provide Direct Services

Suncoast Workforce Board, Inc., doing business as CareerSource Suncoast (CSS), is applying for an extension of the designation as direct service provider of certain workforce services in Sarasota and Manatee counties through June 30, 2026.

CareerSource Suncoast, the Local Workforce Development Board for Area 18, hereby publishes its intent to apply for an extension of their designation as a direct provider to provide the public with an opportunity to comment on the proposed extension.

Public comments must be received no later than March 12, 2023 and can be sent to Christina Witt, Organizational Support Services Director, at cwitt@careersourcesc.com (subject line: Provide Direct Services) or by mail to her attention at

CareerSource Suncoast, 3660 N. Washington Blvd., Sarasota, FL, 34234

[Click here](#) to view the information required for CareerSource Suncoast to formally request an extension to operate as a direct provider of services. The completed application for a 3- year extension, including public comments, must be submitted by April 27, 2023.

Update on Machine Readable Files (MRFs) Implementation

July 1, 2022

2022-2023 RFA for Training Provider Applicants and Registered Apprenticeship

May 4, 2022

Local Targeted Occupations List for PY 2022-2023 Solicitation for Local Input

May 4, 2022

re to search 80°F Sunny 3:35 PM 3/2/2023



Anthony Gagliano
VP/COO

CareerSource Suncoast
December 2022 Quality Assurance Internal Monitoring Report/Response
TANF Summer Youth Employment Program

This report was prepared as a result of a programmatic quality assurance review of the TANF Summer Youth Employment Program (SYEP) administered by CareerSource during 2022.

The review was conducted by CareerSource Suncoast's Quality Assurance Coordinator using the DEO WT Summer Youth Monitoring Tool. The review included twenty-four (24) TANF Summer Youth Employment Program cases and resulted in zero (0) Findings, zero (0) Issues of Noncompliance, four (4) Data Validation/Document Verification issues and six (6) Observations.

Data Validation/Document Verification issues identify discrepancies between data elements recorded in the One-Stop Service Tracking (OSST) system and verifying documentation maintained in participants files and/or discrepancies between information identified on the CSS Career StartUp Eligibility form and the supporting documentation. Staff should review Data Validation/Document Verification issues, correct documentation and/or forms as needed, update the December 2022 CSS TANF SYEP Internal Monitoring Response document and place supporting documentation in applicable folder on the Programs Portal as identified below.

Observations identify situations that CSS staff may need to be aware of but are not included in the 2023 DEO Welfare Transition Summer Youth tab monitoring tool questions. Observations do not require a response, but it is recommended that they are reviewed and taken into consideration for further discussion and corrections/updates made as needed, if possible.

Contact CSS Quality Assurance Coordinator by email at dlee@careersourcesc.com if you have questions regarding the monitoring tool and/or this report.

The following are links to the October 2022 Monitoring Response Document and Supporting Documentation folders:

Programs Portal – Monitoring – CSS Internal Monitoring – December 2022

[Monitoring Report](#)

[Monitoring Response Document](#)

[Monitoring Samples](#)

[Monitoring Tool](#)

TANF SUMMER YOUTH EMPLOYMENT PROGRAM

DATA VALIDATION/DOCUMENTATION VERIFICATION ISSUES

1. Annual Family Income

Sample #18: The Annual Family Income, \$19,158, identified on the Career StartUp eligibility document in participant's file does not match the \$19,940 Total Income on 2021 Income Tax Return supporting documentation.

Sample #21 - Annual Family Income: The Annual Family Income, \$19,822, identified on the Career StartUp eligibility document in participant's file does not match the \$20,919 Total Income on the 2021 Income Tax Return supporting documentation.

Response:

The applications were corrected to reflect the supporting documentation for annual family income and uploaded to client file. (See Supporting Documentation)

2. Worksite Agreements/Participant's Age at Enrollment

Sample #1: Lakewood Cardiovascular Consultants, PA Worksite Agreement identifies paid work-experience opportunity to be provided to Manatee and Sarasota County youth residents ages 16-19. Participant was 15 years of age at the time of enrollment. Reviewer not able to locate a Worksite Agreement or Modification for this employer for providing paid work-experience to youth 15 years of age.

Sample #16: Mt. Carmel Worksite Agreement identifies paid work-experience opportunity to be provided to Manatee and Sarasota County youth residents ages 16-19. Participant was 14 years of age at the time of enrollment. Reviewer was not able to locate a Worksite Agreement or Modification for this employer for youth years of age 14.

Response:

These agreements cannot be corrected. Modification of form did take place; however, it was after these agreements were completed. (See Supporting Documentation)

3. Social Security Number Verification:

Sample #20: The Document Verification Form in participant's file identifies Social Security Card as "SSN Verification" documentation. A copy of a social security card is not included with participant's filed documentation.

Response:

The SSN card was located and uploaded to client file. (See supporting documentation)

4. Authorization to Work/U.S. Citizenship Verification:

Sample #20: Acceptable documentation verifying Authorization to Work/U.S. Citizenship is not in participant's file. "Documentation specified on the I-9 form" is identified on the filed Document Verification form for Authorization to Work/U.S. Citizenship Verification. A document from List B and List C is required to establish Identify and Employment Authorization if a document from List A cannot be provided. The Immunization record in participant's file is an acceptable document from List B to establish Identify (#11. Clinic, doctor, or hospital record). A document from List C of Acceptable Documents is not in participant's file to establish employment authorization.

Response:

The SSN card was located and uploaded to client file. (See supporting documentation)

OBSERVATIONS

1. Support Services

Sample #15: A Support Service was not entered in OSST Benchmark 8 Service for the background screening and drug test documentation in participant's file (Atlas ID# 356350) as required based on the SYEP LOP (LWDB18 LOP - TANF SYEP).

Sample #21: A Support Service was not entered in OSST Benchmark 8 Service for the background screening and drug test documentation in participant's file (Atlas ID# 356349) as required based on the SYEP LOP (LWDB18 LOP - TANF SYEP).

2. Enrollment Benchmark Provider

Sample #9 (Benchmark 1) & #14 (Benchmark 2): Enrollment Benchmark Provider is CareerSource Suncoast instead of TANF Summer Youth Employment as identified in the LWDB18 TANF SYEP LOP.

3. PWE Actual End Date Exceeds Employment Period End Date

Sample #s 1, 3, 4, 5, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19 & 24: The PWE Actual End Date (OSST Job Tracking End Date) for 18 of the 24 files reviewed exceeded the Employment Period End Date identified in the Career StartUp Plan/Job Description documents in the participants files.

4. Duplicate Plan/Job Descriptions Document

Sample #10: Participant's file contains two (2) Plan/Job Description documents, Atlas ID #s 356111, filed 06/06/22 and 357211, filed 06/29/22. The Employment Period Start Date in the document filed 6/29/2022 (Atlas ID# 357211) matches the employment start date, 06/23/22, for the PWE in OSST for this participant. The documents should be reviewed, and the incorrect Plan/Job Description removed to avoid confusion.

Sample #21: Participant's file contains two (2) Plan/Job Description documents, Atlas ID #s 357200 and 357214. The difference in the two documents is the document for Atlas ID# 357214 includes a School District of Sarasota County Custodian Job Description. The documents should be reviewed, and the incorrect Plan/Job Description removed to avoid confusion.

