



# 2020 – 2024 FOUR-YEAR LOCAL WORKFORCE SERVICES PLAN

## Local Workforce Development Area 17

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Date Submitted: March 6, 2020

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## INTRODUCTION

July 22, 2014 marked the strong bipartisan passage of the federal Workforce Innovation and Opportunity Act (WIOA). This long-awaited, yet critical legislative reform is the first reform of the public workforce system in over 15 years. The Act took effect on July 1, 2015 charging local workforce development systems to “increase employment, retention and earnings of participants and to increase industry-recognized postsecondary credential attainment to improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet skill requirements of employers, and enhance productivity and competitiveness of the nation.”

This robust challenge of the WIOA for Polk County is a welcome refresher for the work that has already been done. In a local area where the county is larger than the state of Rhode Island and equal in size to Delaware, there is an ever-increasing need to address the labor market changes and workforce challenges of an increasingly diverse population. Every year, the Polk County workforce system engages thousands of residents who enter the doors of our career centers seeking new employment opportunities, increased wages, enhanced skills and more promising prospects for a better future.

Just as important as a labor force desirous of better career opportunities, businesses are concurrently seeking qualified workers who can sustain the company’s global competitiveness in an ever-changing economy. The workforce system is the crucial component that strategically fosters the critical connection between businesses and workforce talent in an effort to address immediate and future workforce needs. The fostering of strong collaborative partnerships has been at the core of what the local workforce development board does to ensure successful outcomes for both the jobseeker and the employer. CareerSource Polk remains poised to respond to the changing demands of the workforce, brought about by technological advances that lead to declining occupations, talent shortages as a result of the mass exodus of the largest working population from the workforce, and the increasing needs of new skills sets that address the innovations of a globally competitive business climate.

As the entire workforce system undergoes necessary changes to keep pace with new federal laws and the changing economy, CareerSource Polk will keep a close watch on the pulse of Polk to ensure that our residents' needs are met through employment, skill development, transportation, affordable workforce housing and education. Decreasing, but still higher unemployment rates among our youth, veterans, long-term unemployed, individuals with disabilities and ex-offenders continue to be a challenge for the region. CareerSource Polk will continue to form partnerships that will ensure service to these underserved populations so that we may enable members of these special populations to gain and retain full and sustainable employment.

We will continue to stay abreast of the legislative changes to maintain the status of Florida's Workforce System and remain competitive and business-driven.

Our focus remains the same: to ensure accountability for the work we do and the services we provide, while monitoring progress and performance, operating with integrity and implementing service delivery strategies that ensure the success of our workforce.

Forging ahead, CareerSource Polk will continue to focus on developing and enhancing the skills and education of our labor force in order to meet the ever-increasing needs of our primary customer – the employer. Our #1 goal continues to center around expanding our business partnerships and increasing employer market penetration in a concerted effort to ensure that more businesses become aware of and collaboratively engage in the services offered through our workforce system.

## KEY DATES

Task	Deadline
<b>Public Comment:</b> Post Draft Plan on CSP Website and send notice to stakeholders/partners/Board/LEOs	December 20, 2019
<b>Board Approval:</b> CSP Board of Directors Approve Four-Year Plan Draft	February 20, 2020
<b>LEO Approval:</b> Board of County Commissioners Approve Plan	March 3, 2020
<b>Plan Submission:</b> Submit Plan to CareerSource Florida	March 16, 2020

## PUBLIC COMMENT PROCESS

Prior to the date on which the local board submits a local plan, the local board shall:

- (1) Make copies of the proposed local plan available to the public through electronic and other means, such as public hearings and local news media (WIOA §108(d)(1)).

An electronic copy of the updated plan was posted on CareerSource Polk's website on December 20, 2019. Notice was also be sent to stakeholders, partners, Board, LEOs.

- (2) Provide a 30-day period for comment on the plan before its submission to CareerSource Florida, Inc., beginning on the date on which the proposed plan is made available, prior to its submission to the Governor (WIOA §108(d)(2)).

The plan will be available for public comment on CareerSource Polk's website for at least a 30-day period beginning December 20, 2019, before its submission to the Governor.

- (3) Provide a description of the process used by the board to obtain input and comment by representatives of businesses and labor organizations for the development of the plan (WIOA §108(d)(2)).

In addition to the Plan being available on CareerSource Polk's website beginning December 20, 2019, an email notification was sent to all of CareerSource Polk

business and community partners notifying them of the plans availability for public comment. CareerSource Polk also implemented the following process:

- Local elected officials

The Plan is on the agenda for the Polk County Board of County Commissioners meeting on March 5, 2020 for approval.

- Workforce Investment Board

The CareerSource Polk Board of Directors was notified on December 19, 2019 that the plan would be available on CareerSource Polk's website from December 30, 2019 through January 31, 2020 that the plan is on the agenda for approval by the Board of Directors at their meeting on February 20, 2020.

- Members of the Public

The public was able to view the Plan online at [www.careersourcepolk.com](http://www.careersourcepolk.com). The Plan will be posted from December 20, 2019 through January 31, 2020.

(4) Describe efforts to coordinate with other workforce partners to obtain input into the development of the plan.

- Partners

Partners were notified via e-mail on December 20, 2019 of the availability and location of the plan for review and comment for a 30-day period. Announcements regarding the plan were posted at the reception desks of the One-Stop career centers, posted on Facebook and LinkedIn and Twitter.

(5) Include, as an attachment with the plan to the Governor, any comments expressing disagreement or offering recommendations for continuous improvement, the LWDB's response to those comments, and a copy of the published notice (WIOA §108(d)(3)).

Comment page(s) will be attached.

## VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

Through the implementation of the Workforce Innovation and Opportunity Act (WIOA), CareerSource Polk maintains a business-led, market-responsive, results-oriented and integrated workforce development system. The enhanced system fosters customer service excellence, seeks continuous improvement and demonstrates value by enhancing employment opportunities for all individuals, including those with disabilities. This focused and deliberate collaboration among education, workforce, and economic development networks will maximize the competitiveness of businesses and the productivity of its' workforce, thus increasing economic prosperity.

The Local Workforce Development Board's strategic vision for WIOA implementation will be realized by accomplishing these three goals:

- Enhancing alignment and market responsiveness of workforce, education and economic development systems through improved service integration that provides businesses with skilled, productive, and competitive talent and Floridians with employment, education, training and support services that reduce welfare dependence and increase opportunities for self-sufficiency, high-skill and high-wage careers and lifelong learning.
- Promoting accountable, transparent and data-driven workforce investment through performance measures, ongoing monitoring and evaluation to that inform strategies, and driving operational excellence that leads to the identification and replication of best practices to empower an effective and efficient workforce delivery system.
- Improving career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth which lead to enhanced employment, career development, credentialing and post-secondary education opportunities.

## ORGANIZATIONAL STRUCTURE

### (1) Chief Elected Official(s) (CEO)

- A. Identify the chief elected official(s) by name, title, mailing address, phone number and email address.

Name: Bill Braswell  
Title: Commissioner and Chairman  
Company: Polk County Board of County Commissioners  
Mailing Address: 330 W Church St, Bartow, FL 33830  
Drawer BC01, P.O. Box 9005, Bartow, FL 33891-9005  
Email: billbraswell@polk-county.net  
Phone: (863) 534-6050

- B. If the local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), attach the agreement that has been executed to define how the parties will carry out the roles and responsibilities of the chief elected official.

*The local area does not include more than one unit of government.*

- C. Attach a copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board.

A copy of the agreement executed between the chief elected official(s) and the Local Workforce Development Board can be found on the CareerSource Polk website at [www.careersourcepolk.com](http://www.careersourcepolk.com).

- D. Attach a copy of the current by-laws established by chief elected official to address the criteria contained in §679.310(g) of the WIOA regulations. At a minimum, the by-laws must include:

- i. The nomination process used by the chief elected official to elect the local board chair and members;
- ii. The term limitations and how term appointments are staggered to ensure only a portion of memberships expire each year;
- iii. The process to notify the chief elected official of a board member vacancy ensuring a prompt response nominee;
- iv. The proxy and alternative designee process that will be used when a board member is unable to attend a meeting and assigns a designee as per the requirements at §679.110(d)(4) of the proposed WIOA regulations;
- v. The use of technology, such as phone and Web-based meetings, that will be used to promote board member participation;
- vi. The process to ensure board members actively participate in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and,
- vii. Any other conditions governing appointments or membership on the local board.

A copy of the current by-laws can be found on the CareerSource Polk website at [www.careersourcepolk.com](http://www.careersourcepolk.com) .

- E. Describe how the chief elected official is involved in the development, review and approval of the plan.

CareerSource Polk maintains a partnership with the local elected officials to jointly carry out the requirements of the Workforce Innovation and Opportunity Act. This Plan was approved by CareerSource Polk's Board of Directors on February 20, 2020 and submitted to the local elected officials for review and approval according to the established timeline. CareerSource Polk's leadership

team attended the Board of County Commissioners' briefing meeting prior to approval. Final review and approval is scheduled for March 3, 2020.

**(2) Local Workforce Development Board (LWDB)**

- A. Identify the chairperson of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business that the chair represents.

Name: Richard Bryant, Board Chair  
Title: Logistics, Human Resources Manager  
Company: Wal-mart Supply Chain  
Mailing Address: 4505SR 524  
Cocoa, FL 32926  
Phone: (321) 504-0120

- B. If applicable, identify the vice-chair of the Local Workforce Development Board by name, title, mailing address, phone number and email address. Identify the business that the chair represents.

Name: Adil Khan, Board Chair-Elect  
Title: Chief Executive Officer  
Company: Lakeland Surgical & Diagnostic Center, LLP  
Mailing Address: 115 South Missouri Ave.  
Suite 101  
Lakeland, FL 33815  
Phone: (321) 504-0120

- C. Describe how the LWDB was involved in the development, review, and approval of the local plan.

The Local Workforce Development Board worked cohesively with local workforce stakeholders, local elected officials, local workforce development board members, and partners. Board members were engaged in detailed discussion during the month of February Council meetings. The Local Workforce Development Board followed these steps to develop the plan:

**(3) Local Grant Sub-recipient (local fiscal agent or administrative entity)**

- A. Identify the entity selected to receive and disburse grant funds (local fiscal agent) if other than the chief elected official. WIOA section 107(d)(12)(B)(1)(iii); 20 CFR 679.420

The local fiscal agent is Polk County Workforce Development Board, Inc., dba CareerSource Polk.

- B. Identify the entity selected to staff the LWDB (commonly referred to as the administrative entity) and assist it in carrying out its responsibilities as a board organized under WIOA. (May be the same as the fiscal agent). 20 CFR 679.430

The administrative entity and fiscal agent is Polk County Workforce Development Board, Inc., dba CareerSource Polk.

- C. Identify, if a single entity is selected to operate in more than one of the following roles: local fiscal agent, local board staff, one-stop operator or direct provider of career services or training services, and describe how the entity will carry out its multiple responsibilities including how it develops appropriate firewalls to guard against any conflicts of interest as described in CareerSource Florida strategic policy [2012.05.24.A.2 – State and Local Workforce Development Board Contracting Conflict of Interest Policy](#).

Polk County Workforce Development Board, Inc., dba CareerSource Polk currently operates as the local fiscal agent, the local board staff, one-stop operator and director provider of career services.

### **Firewall**

The CSP Board of Directors ensures compliance with responsibility and authority as outlined in the Agreement with the Polk County Board of County Commissioners, by reviewing the One-Stop Operator activities and responsibilities. The Board sets the strategies and governance, and holds the President/CEO accountable to translate those items into operational policies, procedures, and implementation.

Career Source Polk's Board of Directors engages the programmatic and fiscal monitoring services of the CPA firm of Taylor Hall Miller Parker, P.A. to conduct monitoring on a quarterly basis. This monitoring team randomly selects One-Stop Operator quarterly reports during the program year, inspects the report and interviews staff to determine if they addressed, at a minimum, the following requirements as outlined in the MOU with the Polk County Board of County Commissioners:

- Developed strategies to improve coordination of services across One-Stop partner programs to enhance service delivery and improve efficiencies, including partner meetings.
- Developed Memorandums of Understanding and Infrastructure Funding Agreements with One-Stop Partners.
- Developed an appropriate mechanism to report quarterly the progress and performance of the partnerships.

### **Conflict of Interest**

CSP Board ensures compliance with disclosure of any potential conflict of interest arising from the relationship of CSP as the One-Stop Operator, with training providers or other service providers. CSP adheres to the Conflict of Interest policy, which is thoroughly reviewed with Board members during CSP board member orientation, and reiterated in Article VI, Section 2 and 3 of the CSP Board bylaws. Career Source Polk's Board of Directors reviews, on quarterly basis, a Related Party Transactions Report which outlines any financial transactions that have taken place during the previous quarter between CSP and a board members company, place of employment, etc.

The Agreement between Polk County (a political subdivision of the State of Florida) and the Polk County Workforce Development Board, Inc. dba

CareerSource Polk for the One-Stop Operator which outlines the responsibilities of each party can be found at [www.careersourcepolk.com](http://www.careersourcepolk.com) .

**(4) One-Stop System**

- A. Describe the local one-stop system (including the number, type and location of comprehensive center(s)<sup>3</sup>, and other service delivery points).

CareerSource Polk operates two full service One-Stop career centers. Both centers provide WIOA, TAA, WT, SNAP, Veterans, Wagner-Peyser, MSFW and RESEA. CareerSource Polk serves as the One-Stop Operator. AARP, Vocational Rehabilitation, Polk County Public Schools GED Program and Job Corps provide services at the One-Stop career centers.

All other partners are located at their own facilities. CareerSource Polk also provides the rural community with services on the Mobile One-Stop Unit on an as-needed basis.

- B. Identify the days and times when service delivery offices are open to customers. Customers must have access to programs, services and activities during regular business days at a comprehensive one-stop center.

CareerSource Polk operates its career centers from Monday through Thursday from 7:30 am to 5:00 pm and on Fridays, from 7:30am (phone only) and 9:00a to 12:30pm (walk-ins).

- C. Identify the entity or entities selected to operate the local one-stop center(s).

CareerSource Polk serves as the One-Stop Operator.

- D. Identify the entity or entities selected to provide career services within the local one-stop system.

The entity selected to provide career services within the local one-stop system is CareerSource Polk.

- E. Identify and describe what career services will be provided by the selected one-stop operator and what career services, if any, will be contracted out to service providers.

CareerSource Polk partners with providers of secondary and postsecondary education programs to develop and implement career pathways by aligning the employment, training, education, and supportive services that are needed for adult and dislocated workers through the one-stop delivery system.

CareerSource Polk provides career services through the One-Stop career center delivery system by fully integrating all programs covered under this local plan into the full range of available workforce development services. CareerSource Polk supports the use of career pathways to provide individuals with barriers workforce activities, education and supportive services to enter or retain employment.

Starting with determination of eligibility for assistance and orientation of all the services available through the one-stop delivery system, the region does a detailed assessment, regardless of entry point into the One-Stop delivery system, which allows the staff to best gauge the level and types of assistance the participants will need. This assessment allows the case managers to customize and personalize a plan of action to remove as many barriers the participant may have. The region firmly believes that each customer and situation is unique and when possible individualized attention and services are best delivered. Aside from the basic assistance available to our “global” participants such as, résumé preparation assistance, job search and referrals, job readiness workshops, access to internet, fax and copiers; there are specific options available to hard to serve populations.

Some of the services include:

- Comprehensive and specialized assessment of skill levels, and service needs
- Job search and placement assistance including workshops and referrals
- Provision of workforce and labor market information on in-demand industry sectors and occupations, and provision of information on nontraditional employment
- Provision of referrals and coordination of activities with other programs and services
- Individual Employment Plan to identify goals, achievement objectives and services needed
- Short term pre-vocational services
- Internships and work experiences that are linked to careers
- Workforce preparation activities
- Financial literacy services
- Case Management for those seeking training
- Entrepreneurship training

The Disabled Veteran Outreach Program (DVOP) Coordinator is responsible for veterans' service delivery to those veterans with significant barriers and where feasible, will support one-stop delivery system staff in the provision of priority services for veteran customers.

The Board assures that One-Stop career center system operators will coordinate with local Rapid Response staff related to outreach, intake and registration of workers covered by a certification under the Trade Adjustment Assistance Act.

- F. Pursuant to the [CareerSource Florida Administrative Policy 093 - One-Stop Career Center Certification Requirements](#), provide the required attestation that at least one comprehensive one-stop center in your local area meets the certification requirements.

CareerSource Polk attests that our local area one-stop career centers meet the certification requirements. Full Service One-Stop career centers are located at:

- 500 E. Lake Howard Drive, Winter Haven, FL 33880
- 309 N. Ingraham Avenue, Lakeland, FL 33801

## ANALYSIS OF NEED AND AVAILABLE RESOURCES

(1) Please provide an analysis (or existing analysis pursuant to WIOA section 108(c)) of the regional economic conditions, which must include:

A. Information on existing and emerging in-demand industry sectors and occupations; and

CareerSource Polk is committed to ensuring that the services we provide properly and appropriately align with the needs of the business community. It is clearly understood that the best way to recognize and fulfill the needs of business is to know the characteristics of the local area and listen to the business community regarding what they are looking for in their workforce.

The total area of the county is approximately 2,010 square miles which makes it the fourth largest county in Florida, exceeded only by Dade, Palm Beach, and Collier counties. The total land area of Polk County is approximately 1,875 square miles.

Polk County has an estimated population of 708,009 as of July 1, 2018. Based on the US Census Bureau Polk County Quick Facts, the county population is distributed as follows: 78.9% white, 16.1% black, Hispanic or Latino 23.6%, 2.2% reporting two or more races, 1.9% Asian, 0.1% native persons and other Pacific Islander, and Foreign born persons comprise 10% of the region's population. (Data retrieved from <https://www.census.gov/quickfacts/polkcountyflorida>).

Notable strengths for the region include the fact that logistically Polk County is the only Southeast location which offers two international airports within an hour's drive – Orlando and Tampa. It is intersected by Interstate 4, the Polk County Parkway, State Road 60 and Highway 27, and has easy access to Interstate 75 on the west and 95 on the east. Metropolitan Orlando-Kissimmee and Tampa-St. Petersburg, Clearwater located in adjacent counties, each have a cost of living index of 96, while metropolitan Lakeland has a cost of living index of 86.4.

Opportunities for improvement include the fact that among adults aged 25 or older, 15.7% do not have a high school diploma or equivalent. Polk County has the eleventh highest single-year dropout rate in Florida, 7.8%. However, this rate has been declining, down from 11.9% in 2012-2013.

Those holding a Bachelor's degree or higher comprise 19.5% of the region's population versus the state average of 28.5%.

Polk County's economy has been historically based on three primary industries: phosphate mining, agriculture and tourism. Today, phosphate mining, agriculture and tourism still play vital roles in the local economy. However, the county has successfully expanded and diversified its economic base in recent years. Polk County's central location within the large Florida marketplace has attracted numerous manufacturers and distribution centers in recent years. There are more than 440 manufacturers in the county, manufacturing a broad line of products – including food products, chemicals, paper and building materials and benefit from Polk County's logistics and distribution advantages.

### **Existing Demand Occupations**

The majority of the top 15 existing demand occupations in our County are low-skill occupations characterized by relatively low wages and high rate of worker turnover.

The top five existing demand occupations are related to customer service and hospitality or involve manual work.

Combined food preparation and serving workers, including fast food is the top existing demand occupation, with 8,255 projected total job openings between 2019 and 2027.

Registered Nurses is the only top 15 existing demand occupation that require technical training. The other occupations emphasize customer service or manual/clerical work.

One of the top 15 existing demand occupations is Registered Nurses, which will continue to experience employment growth as a result of the increasing demand for healthcare services, driven by population growth and aging, expanding insurance coverage, and technological change.

TOP EXISTING DEMAND OCCUPATIONS										
Ranked by Total Job Openings										
Rank	SOC Code	SOC Title	Employment				Total Job Openings	2018 Median Hourly Wage (\$)*	Education	
			2019	2027	Growth	Percent Growth			FL†	BLS†
1	35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	6,786	8,255	1,469	21.6	12,369	9.28	NR	NR
2	53-7062	Laborers and Freight, Stock, and Material Movers, Hand	6,982	7,782	800	11.5	8,775	14.18	NR	NR
3	35-3031	Waiters and Waitresses	4,786	5,512	726	15.2	8,447	9.47	NR	NR
4	41-3021	Insurance Sales Agents	5,145	5,823	678	13.2	4,821	23.48	PS	HS
5	43-4051	Customer Service Representatives	6,279	6,923	644	10.3	7,306	14.73	PS	HS
6	29-1141	Registered Nurses	4,331	4,905	574	13.3	2,435	28.69	A	B
7	37-3011	Landscaping and Groundskeeping Workers	3,418	3,946	528	15.4	4,008	11.26	NR	NR
8	41-2031	Retail Salespersons	8,935	9,392	457	5.1	10,916	11.10	HS	NR
9	37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	3,414	3,867	453	13.3	4,181	11.25	NR	NR
10	53-3032	Heavy and Tractor-Trailer Truck Drivers	6,364	6,806	442	6.9	5,985	20.34	PS	PS
11	35-2014	Cooks, Restaurant	2,054	2,457	403	19.6	2,904	12.34	PS	NR
12	51-9198	Helpers--Production Workers	1,327	1,695	368	27.7	2,167	11.38	NR	HS
13	43-5081	Stock Clerks and Order Fillers	3,925	4,257	332	8.5	4,451	12.84	HS	HS
14	31-9092	Medical Assistants	1,008	1,328	320	31.7	1,304	14.22	PS	PS
15	43-9041	Insurance Claims and Policy Processing Clerks	1,579	1,867	288	18.2	1,651	17.91	HS	HS

## Emerging Industries

Health care, food services and drinking places, and management of companies and enterprises industries top the lists of emerging industries. Emerging industries tend to employ a higher percentage in professional occupations, however, there has been a tremendous growth in the food services and administrative and support services in the region during the recent years.

TOP EMERGING INDUSTRIES						
WORKFORCE DEVELOPMENT AREA 17 - POLK COUNTY						
Rank	NAICS Code	NAICS Title	Employment			Percent Growth
			2019	2027	Growth	
1	621	Ambulatory Health Care Services	12,661	15,803	3,142	24.8
2	722	Food Services and Drinking Places	18,865	22,348	3,483	18.5
3	551	Management of Companies and Enterprises	6,624	7,662	1,038	15.7
4	611	Educational Services	4,839	5,549	710	14.7
5	327	Nonmetallic Mineral Product Manufacturing	1,038	1,187	149	14.4
6	524	Insurance Carriers and Related Activities	9,900	11,257	1,357	13.7
7	561	Administrative and Support Services	16,458	18,708	2,250	13.7
8	488	Support Activities for Transportation	1,508	1,706	198	13.1
9	541	Professional, Scientific, and Technical Services	7,735	8,709	974	12.6
10	339	Miscellaneous Manufacturing	1,132	1,265	133	11.7
11	493	Warehousing and Storage	8,065	9,003	938	11.6
12	711	Performing Arts, Spectator Sports, and Related Industries	767	855	88	11.5
13	236	Construction of Buildings	2,320	2,570	250	10.8
14	424	Merchant Wholesalers, Nondurable Goods	5,253	5,808	555	10.6
15	713	Amusement, Gambling, and Recreation Industries	3,289	3,624	335	10.2
16	442	Furniture and Home Furnishings Stores	906	984	78	8.6
17	622	Hospitals	8,338	9,044	706	8.5
18	238	Specialty Trade Contractors	9,460	10,249	789	8.3
19	423	Merchant Wholesalers, Durable Goods	5,132	5,522	390	7.6
20	811	Repair and Maintenance	2,771	2,966	195	7.0

## **Emerging Occupations**

Knowing which occupations within industries are gaining the most new jobs and those that are the fastest growing helps workforce officials stay focused on training residents for jobs that will not only be available, but will assist economic developers in supporting growing businesses. If area employers cannot find the trained people needed to fuel their growth, there could be an adverse effect on the area economy. At the same time, occupational analysis assists CareerSource Polk and its educational partners in planning for the types of programs needed.

The majority of top emerging occupations occur in the healthcare (six of the top 15) and professional services (four of the top 15) industry sectors, which follows the overall Florida statewide distribution of top emerging occupations.

In 2019, one of the healthcare industry sector top emerging occupations is Nurse Practitioners, who can prescribe medication, examine patients, diagnose illnesses, and provide treatment, much like physicians do. Over the course of two years, this occupation has transitioned from the top 15, as did Diagnostic Medical Sonographers also listed in 2019 as one of the top emerging occupations under professional services.

Medical assistants, production workers and combined food preparation and serving workers are also three of the top 15 occupations in demand in our region with the most job openings. These occupations require minimal technical education.

TOP 15 EMERGING OCCUPATIONS										
(ranked by percent (growth))										
Workforce Development Area 17 - Polk County										
Rank	SOC Code	SOC Title	Employment				Total Job Openings	2018 Median Hourly Wage (\$)*	Education	
			2019	2027	Growth	Percent Growth			FL†	BLS†
1	29-1171	Nurse Practitioners	266	360	94	35.3	215	47.97	M+	M
2	29-2032	Diagnostic Medical Sonographers	161	213	52	32.3	128	29.40	PS	A
3	31-9092	Medical Assistants	1,008	1,328	320	31.7	1,304	14.22	PS	PS
4	29-2057	Ophthalmic Medical Technicians	135	175	40	29.6	135	17.40	PS	PS
5	15-1132	Software Developers, Applications	322	412	90	28.0	274	44.39	A	B
6	31-9011	Massage Therapists	147	188	41	27.9	177	25.81	PS	PS
7	51-9198	Helpers--Production Workers	1,327	1,695	368	27.7	2,167	11.38	NR	HS
8	31-2021	Physical Therapist Assistants	145	183	38	26.2	193	28.91	A	A
9	13-1161	Market Research Analysts and Marketing Specialists	405	502	97	24.0	442	25.73	B	B
10	51-9081	Dental Laboratory Technicians	190	235	45	23.7	231	14.77	PS	HS
11	29-1062	Family and General Practitioners	148	183	35	23.6	69	-	M+	D
12	11-3031	Financial Managers	438	540	102	23.3	386	45.25	B	B
13	39-2021	Nonfarm Animal Caretakers	350	430	80	22.9	545	10.43	NR	HS
14	13-1141	Compensation, Benefits, and Job Analysis Specialists	159	195	36	22.6	149	21.55	A	B
15	35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	6,786	8,255	1,469	21.6	12,369	9.28	NR	NR

B. The employment needs of employers in those industry sectors and occupations (WIOA §108(b)(1)(A)).

Of the fastest growing occupations and the occupations gaining the most new jobs, more than 50% of the occupations require education beyond a high school diploma. CareerSource Polk uses a variety of methods to identify needed job skills. We work with employers and industry related organizations to identify worker shortages in specific occupations as well as identifying challenges facing businesses in filling jobs. Work readiness skills are the number one concern for area businesses. To address those concerns, the information is communicated to our education and training partners in order to aid them in crafting curriculum and developing programs that meet the current and future business needs.

Workforce needs of the businesses are also identified through staff and Board involvement on various committees and taskforces throughout the county. Through this engagement, board members are encouraged to utilize workforce services and provide constructive feedback regarding any opportunities for improvement needed in our system delivery.

Through the use of the Regional Targeted Occupations List (RTOL), employers, local economic development and educational partners, and other industry representatives have the opportunity to review, comment and make

recommendations for changes at any time. Requested changes are then presented to the Workforce Performance Council (WPC) for review, including local and state economic development priorities and linkage to local job opportunities. Additionally, the WPC considers the region's projected employment and earnings outcomes. The WPC then generates its' recommendations for the final RTOL.

Priority for training is given to occupations in the regionally identified Targeted Industry Sectors:

- Healthcare and Life Sciences
- Logistics and Distribution
- Bio-fuels and Renewable Energy
- Niche Manufacturing [Aviation, Food and Beverage, Plastics, and Building Component Design]
- Agriculture and Information Technology
- Florida's targeted and infrastructure industries area also considered.

**(2)** Please provide an analysis of the knowledge and skills needed to meet the employment needs of the employers in the local area, including employment needs in in-demand industry sectors and occupations (WIOA §108(b)(1)(B)).

Of the fastest growing occupations and the occupations gaining the most new jobs, more than 50% of the occupations require education beyond a high school diploma. Per labor market statistics, in 2019, the educational attainment level of Polk County workforce participants from 25 years and older with a high school diploma or higher was at 91 percent. Polk has seen improvement in educational attainment since that time. Now, Polk County workforce participants from 25 years and older with a high school diploma or higher is 90%.

However, we are still seeing a trend of employers in the area of healthcare and education which are extending their recruitment efforts outside of the County, looking for specific skills, education and experience not available in Polk.

CareerSource Polk partners with employers to identify the skills and competencies necessary to attain self-sustaining employment and to offer high quality training to individuals to obtain those skills.

Some of the skills needed in the Healthcare industry are:

- Writing technical health or medical documents
- Reading and comprehension of medical data, patient records, etc.
- Knowledge of medical terminology
- Understanding properties or composition of drugs
- Maintaining records of medication or equipment dispensed to patient
- Ability to follow institutional procedures
- Geriatrics
- Critical Care

Some of the skills needed in the Educational Area

- Reading and comprehension
- Writing skills
- Ability to assess educational potential or need of students
- Ability to adapt activities to meet participant needs
- Advise/intervention families with household problems
- Knowledge of other languages (other than English)
- Quality Assurance
- Customer Relationship Management
- Technical Support
- Food Preparation
- Structured Query Language (SQL)
- Preventative Maintenance
- Java

Top Certifications required by Online Ads

**Top 15 Certifications required by Online Ads in Polk County, Florida**

<b>Top Certifications by Online Ads</b>	<b>Online Ads November 2019</b>
Driver's License	1,541
Class A Commercial Driver's License	657
Commercial Driver's License (CDL)	578
Certified Registered Nurse (RN)	445
Occupational Safety & Health Administration Certification (OSHA)	273
DOT Medical card	252
Continuing Education (CE)	235
Licensed Practical Nurse (LPN)	226
HAZMAT	215
Certification in Cardiopulmonary Resuscitation (CPR)	211
Food safety programs (HAACP)	202
Security clearance	146
Board Certified	130
State insurance license	128
Advanced Cardiac Life Support (ACLS)	125

Source: The Conference Board, Help Wanted On-Line, prepared by Workforce Statistics and Economic Research, Florida Department of Economic Opportunity.

- (3) Please provide an analysis of the workforce in the local area, including current labor force employment (and unemployment) data, information on labor market trends, and the educational and skill levels of the workforce in the local area, including individuals with barriers to employment (WIOA §108(b)(1)(C)).

**Labor Force and Unemployment**

The unemployment rate has declined by 1.3 percentage points over the year to 4.1 percent in December 2017. Since the trough of the Great Recession (unemployment rate = 11.3 percent), the unemployment rate has decreased by 7.2 percentage points. The labor force has been increasing in recent years (September 2015 labor force = 283,242). In addition, the number of unemployed persons has been declining in recent years (September 2015 unemployed persons = 17,335) and

the number of employed persons has been increasing (September 2015 employed persons = 265,907).

### **Mining, Logging, and Construction**

In December 2017, the employment was 13,700. The over the year change in December 2017 (+800, +6.2 percent) was more than 100 when compared to September 2015 (+700 jobs, +6 percent). The number of jobs in this sector has been trending upward over the past year.

### **Manufacturing**

In December 2017, the employment was 17,400. The over the year change in December 2017 (+300, 1.8 percent) was less than 200 compared to September 2015 (+500 jobs, +3.1 percent). The number of jobs in this sector has been trending upward over the past four years.

### **Trade, Transportation, and Utilities**

In December 2017, the employment was 56,000. The over the year change in December 2017 (+1,300, +2.4 percent) was 900 less than September 2015 (+2,200 jobs, +4.5 percent). The number of jobs in this sector has been trending downward over the past year.

### **Information**

In December 2017, the employment was 1,700. The over the year change in December 2017 (+0 jobs, +0 percent) was equal to September 2015 (+0 jobs, +0 percent). The number of jobs in this sector has been fairly constant for over six years.

### **Financial Activities**

In December 2017, the employment was 13,100. The over the year change in December 2017 (+300, +2.3 percent) was 300 more when compared to September 2015 (+0 jobs, +0 percent). The number of jobs in this sector has been trending upward over the past two years.

### **Professional and Business Services**

In December 2017, the employment was 31,900. The over the year change in December 2017 (+1,500, +4.9 percent) was 200 more when compared to September 2015 (+1,300 jobs, +4.9 percent). The number of jobs in this sector has been trending upward for almost two years.

### **Education and Health Services**

In December 2017, the employment was 32,800. The over the year change in December 2017 (-100, -0.3 percent) is 1900 less when compared to September 2015. The number of jobs in this sector has been trending downward for nearly two years.

### **Leisure and Hospitality**

In December 2017, the employment was 23,900. The over the year change in December 2017 (+300, +1.3 percent) was 400 less when compared to September 2015 (+700 jobs, +3.4 percent). The number of jobs in this sector has been trending downward for over a year.

### **Other Services**

In December 2017, the employment was 6,100. The over the year change in December 2017 (+100, +1.7 percent) is 100 more when compared to September 2015 (+0 jobs, +0 percent) percent). The number of jobs in this sector has been fairly constant for over two years.

### **Government**

In December 2017, the employment was 30,700. The over the year change in December 2017 (+1,900, +6.6 percent) is 1500 more when compared to September 2015 (+400 jobs, +1.5 percent). The number of jobs in this sector has been trending upward over the past two years.

## **Education of the Workforce**

In 2017, the educational attainment level of Polk County workforce participants from 25 years and older with a high school diploma or higher was at 91 percent, followed by those with a bachelor's degree or higher at 32 percent. Only 9 percent of workforce participants had attained less than a high school diploma or equivalent.

Overall, the county faces a skills mismatch. High skill/high wage positions are difficult to fill, while the county unemployment continues to go down. With only 9% of the population without a high school diploma, employment opportunities are greater than they have been in the past but still limited for those, and meeting prerequisites for educational/training programs can continue to seem unattainable.

Individuals with criminal backgrounds have found it harder than most other sub-groups in finding employment, even when their qualifications meet the employers' needs. Because a prison record or felony greatly reduces prospects in the job market, even individuals with in demand skills seem to have fewer opportunities to interview with a prospective employer whether or not the charges legally or illegally make them ineligible for a job opening.

## **Persons with Barriers to Employment**

The most recent information on unemployment rates for persons with barriers to employment is for 2016. Polk County 2016 unemployment rate was 21.0 for disabled persons, 8.8 percent for American Indians and Alaska Natives, 0.0 percent for Native Hawaiians and Other Pacific Islanders, and 5.75 percent for persons 55 and older.

- (4) Please provide an analysis of the workforce development activities (including education and training) in the local area, including an analysis of the strengths and weaknesses of such services and the capacity to provide such services, to address the identified education and skill needs of the workforce and employment needs of employers in the local area (WIOA §108(b)(1)(D) and §108(b)(7)).

The implementation of WIOA provided a new opportunity to fully evaluate the workforce development system, policies, procedures and strategies to better meet the skill needs of the workforce and the talent needs of employers. The evaluation also allowed for the identification of strengths and weaknesses as listed below:

Identified areas of strengths include:

- a. Strong relationships among board executive leadership allowing for collaboration on numerous initiatives and grant applications and frequent sharing of information and best practices.
- b. Diverse secondary and postsecondary training opportunities in the State.
- c. Logistically, Polk County is the only Southeast location which offers two international airports within an hour's drive – Orlando and Tampa. It is intersected by Interstate 4, the Polk County Parkway, State Road 60 and Highway 27, and has easy access to Interstate 75 on the west and 95 on the east. Metropolitan Orlando-Kissimmee and Tampa-St. Petersburg, Clearwater located in adjacent counties, each have a cost of living index of 99.1, while metropolitan Lakeland has a cost of living index of 91. Our 3.5 million-strong talent pool is supported by world-class educational institutions like Florida Polytechnic University and the Polk State Clear Springs Advanced Technology Center. Both institutions offer rigorous, industry-focused courses of study that leave students fully prepped for career success before their graduation caps hit the ground.
- d. Two fully integrated one-stop career centers to serve a wide variety of customers including specific populations and programs (WIOA, WT, SNAP, MSFW, Veterans, TAA, Wagner-Peyser, RESEA). A service model to ensure a true seamless service that allows for staff to serve any customer who walks through the door in a more effective, comprehensive and efficient manner.
- e. CareerSource Polk encourages and promotes the attainment of high skill/high wage jobs through the Individual Training Account System, designed to equip

eligible individuals to enter the workforce and retain employment. The use of the Regional Targeted Occupations List (RTOL) serves as the catalyst for establishing approved occupational training programs in the County, emphasizing “in demand” occupations.

Opportunities for improvement include:

- a. The fact that among adults aged 25 or older, still 9% do not have a high school diploma or equivalent. Polk County has the eleventh highest single-year dropout rate in Florida, 13.6%. Those holding a Bachelor’s degree or higher comprise only 19.9% of the region’s population versus the state average of 32%.
- b. Increasing the share of working-age adults who have postsecondary education or industry-recognized credentials.
- c. Development and utilization of contextualized literacy programs are crucial to helping TANF/SNAP Able Bodied Adults without Dependents (ABAWD) clients and will be a component of alignment of educational services.
- d. Population is growing older. The number of Polk county residents age 65 and over was 133,230 in 2016 (20%). The state’s percentage of those aged 65 and over is 117 percent; this is largely a by-product of the aging of the Baby Boomers population.
- e. Workers from the front-end of the baby-boom generation are moving into their 60s and, beginning in 2011, were expected to retire from the workforce in large numbers. Due to the recent economic conditions, many chose to remain employed, thus complicating job opportunities for younger workers. Inevitably, baby-boomers will leave the workforce in large numbers very soon, taking with them knowledge and experience that kept industries growing and prosperous.
- f. Growing immigrant population with language barriers.

Workforce strategies must also take into account the skills and abilities of individuals with barriers to employment, including individuals with disabilities, veterans, ex-offenders, Temporary Assistance for Needy Families (TANF) recipients and those who do not speak English well or at all, to meet present workforce needs and future demand.

Workforce development activities include:

<b>Activity</b>	<b>Description</b>	<b>Strength(s)</b>	<b>Weaknesses</b>
Orientation/Intake	Information about all the services available through the One-Stop career center for all service seekers	<ul style="list-style-type: none"> <li>▪ Assist in determining need for supportive services including childcare</li> <li>▪ transportation available in Polk and referral to such services;</li> <li>▪ Allows staff to establish eligibility and determination for all programs and provide follow up services for individuals as applicable.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Multi-step process, may frustrate customer</li> </ul>
Resume Assistance/Quality Job Referral	Review or assistance to create a resume to be posted on Employ Florida	<ul style="list-style-type: none"> <li>▪ Ensure resume is professional and reflects the specific knowledge, skills and abilities of the customer</li> <li>▪ Facilitates job matching and quality referrals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Time consuming, depends on customer having all information immediately available</li> </ul>
Assessment of skill levels and service needs	Testing to determine skills levels, interest, aptitudes	<ul style="list-style-type: none"> <li>▪ Assists in the determination of customer's job readiness</li> </ul>	<ul style="list-style-type: none"> <li>▪ May frustrate customer</li> </ul>
Job Readiness Workshops	Intensive workshop with the latest techniques in resume writing, Dress for success, Interviewing techniques Mock interviews	<ul style="list-style-type: none"> <li>▪ 2-Weeks of intensive training to assist customers stand out from other candidates.</li> <li>▪ Customers are more confident upon completion of training.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Long training</li> <li>▪ Face-to-face</li> <li>▪ Attendance only offered at the One-Stop career centers.</li> <li>▪ Requires individual to travel to the career centers.</li> </ul>
Labor Market Information	Statistical information related to occupations in demand, earnings and skill requirements.	<ul style="list-style-type: none"> <li>▪ Information readily available on job skills necessary to obtain the jobs described in the statistics and information relating to local occupations in demand and the earnings and skill requirements for such occupations</li> </ul>	
Individual Employment Plan	Establishes customer's employment goals, achievement objectives, combination of services.	<ul style="list-style-type: none"> <li>▪ Developed with customer, provides guidance on how to achieve their goals and the list of available services to assist them with their goals</li> </ul>	<ul style="list-style-type: none"> <li>▪ Requires face-to-face meeting with Case Manager, one step of the multiple steps required for program participation.</li> </ul>
Case Management	Provides customers with counseling, assistance, follow up	<ul style="list-style-type: none"> <li>▪ Case Manager provides on-going support through the process</li> <li>▪ Removes barriers to employment</li> </ul>	<ul style="list-style-type: none"> <li>▪ Difficult to keep contact information.</li> </ul>
Individual Training Accounts	Provides eligible customers with a scholarship account to access training programs through approved training providers in a demand occupation.	<ul style="list-style-type: none"> <li>▪ Encourage and promote attainment of high skill/high wages;</li> <li>▪ Based on customer choice;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Issued only for qualified programs at qualified schools</li> </ul>

Employer services	Assisted process for job posting, recruiting events, job referrals, grants, labor market information	<ul style="list-style-type: none"> <li>▪ On-going support through the process of job postings, job referrals, recruiting qualified individuals;</li> <li>▪ Employer receives percentage of wage reimbursement while the employee is in training</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cumbersome process to obtain placement results in a timely manner.</li> </ul>
Supportive Services	Services such as transportation, referral to child care, dependent care, housing, etc. that are necessary to enable an individual to participate in activities authorized under the Act.	<ul style="list-style-type: none"> <li>▪ Assists individuals with necessary services while participating in a program.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Limited funds.</li> </ul>

(5) Please provide a description and assessment of the type and availability of adult and dislocated worker employment and training activities in the local area (WIOA §108(b)(7)).

Employment and training activities available for adult and dislocated worker customers include but are not limited to:

- Orientation to the services available through the One-Stop career center for all service seekers;
- Outreach, recruitment and intake;
- Initial assessment of skill levels, aptitudes and abilities in order to determine job readiness;
- Matching of employer job requirements and screening for supportive service needs;
- Job search and placement assistance, including job workshops, job referrals and job development;
- Job preparation class: our free workshops on interview techniques, resume writing, dressing for success and other topics that will help customers stand out from other candidates;
- Provision of employment statistics information which includes job vacancy listings in the local, regional and national labor market areas;
- Information on job skills necessary to obtain the jobs described in the statistics and information relating to local occupations in demand and the earnings and skill requirements for such occupations;

- Provision of accurate information relating to the availability of supportive services, including childcare and transportation available in Polk County, and referral to such services, as appropriate;
- Assistance in establishing eligibility and determination for all programs and provide follow up services for individuals as applicable;
- Referral to other services – customer may be referred for other services as needed, i.e. Welfare Transition, Ticket-To-Work, SNAP, Veterans, Youth Services, Migrant Seasonal Farm Worker;
- Development of an Individual Employment Plan via Employ Florida System to identify the employment goals, appropriate achievement objectives, and appropriate combination of services;
- Short-term pre-vocational services, including development of learning skills, communication skills, interviewing skills, punctuality and professional conduct to prepare individuals for unsubsidized employment or training;
- Assistance with filing for financial aid;
- Individual, group and career counseling;
- Individual training accounts for up to \$7,500: workers who are either unemployed or working in low-wage jobs may be eligible for tuition assistance up to \$7,500 including instructional costs, books, materials, fees (such as application costs, registration, and laboratory fees) and academic supportive services. The primary focus is on the attainment of certificates or degrees of value in the labor market leading to a job in high demand occupations, and emerging industries;
- On-the-job-training (OJT) – training for customers that are new employees may receive paid training and their employers are reimbursed a percentage of the new employee wages while in training if their business is located in Polk County and meets all federal guidelines;
- Employed Worker Training – training for an existing employee who is given industry wide training by the employer who is then reimbursed a percentage of the training cost.

- Internships – paid work experience to bridge the gap between the educational and professional worlds, making it easier to transition from academic life into a career.

## **TRAINING ACTIVITIES**

Training services are designed to equip eligible individuals with the skills to enter the workforce and retain employment. These services will be provided by Board approved providers or other special grant programs and includes:

- Services provided to individuals who meet eligibility requirements: are unemployed, unable to obtain employment; or are employed, but are determined in need of additional services in order to obtain or retain employment that allows for self-sufficiency. Customers are interviewed; evaluated and assessed by the case manager who determines customer is in need of training services and has the qualifications to successfully participate (appropriate TABE scores, interest and aptitude) in the selected program or training services.
- Selection of programs for training services that are directly linked to Polk County high skill/high wage employment opportunities or similar opportunities in other geographic areas for which the individual is willing to relocate.

Once customer eligibility is established, the ITA will be used as the primary funding source;

- Customer has to apply for financial aid from the Pell Grant and other available financial sources, to use as the secondary funding source for other training related costs not covered through the ITA
- Customers are determined to be eligible in accordance with the priority system or are determined to be a candidate directed to other special programs.

(6) Please provide a description and assessment of the type and availability of youth workforce investment activities in the local area, including activities for youth who are individuals with disabilities. The description and assessment must include an identification of successful models of such youth workforce investment activities (WIOA §108(b)(9)).

The Local Board provides high-quality services for all youth and young adults, beginning with career exploration and guidance, continued support for educational attainment, opportunities for skills training in in-demand industries and occupations. Services are provided to youth ages 16 to 24 who reside in Polk County. We qualify and assist youth in gaining academic and employability skills needed to become successful as they transition into adulthood.

Career Source Polk will conduct training for youth staff, to better understand the different types of disabilities, how to handle issues of disclosure and disability identification with sensitivity at program intake, and how to determine the most effective mix of services and referrals to make when a disability is identified. These trainings will be presented by subject matter experts and include such topics as: federal, state, and local disability policies; identifying barriers/hidden disabilities; disability awareness and etiquette; website accessibility; providing reasonable accommodations; assistive technology accommodations and resources; Section 503 for federal contractors; and simulation training. Vocational Rehabilitation (VR), Mental Health Centers, and the Department of Correction will also be invited to attend these events and asked to present on relevant topics.

Within the youth facilities, staff will be trained to follow established procedures to ensure inclusion and compliance. Starting with intake, customers should be asked if any assistance is needed and if they have a disability, once they are assured that their response is voluntary and will be kept confidential. Customer orientations should include a discussion of Equal Opportunity (EO) and the right to file a complaint. Following orientation, services should be reviewed with the client by

determining the client's eligibility and need of services in an integrated setting. For example, not all customers should be automatically referred to VR; only those that appear to be eligible and in need of VR services. Ongoing training will need to occur to educate staff on the services, funding, and the resources available to determine when it is appropriate to refer to partner agencies and possibly blend funding. Agency partners will seek to coordinate efforts and leverage funding between partner agencies to meet the employment and training needs of the customer. Memorandums of Understanding may be developed or reviewed, as necessary, to outline the responsibilities of each partner.

Workforce Development Boards, through the IN-DEI grant, may continue to operate as Employment Networks (EN) and either offer benefits counseling in-house or work with their local Work Incentives Planning and Assistance (WIPA) representative to provide benefits counseling to Social Security beneficiaries receiving SSI/SSDI. WDBs not currently operating as an EN will receive information and training about the benefits of the Ticket to Work Program and how to become an active EN.

Staff will also be trained to use multiple resources and tools to ensure accessibility to services. One such resource that staff will be encouraged to use is the Guidepost for Success, which is a set of key educational and intervention strategies for youth, including those with disabilities. Additionally, One-stop assessments, Individual Service Strategy (ISS), and Academic and Career Planning (ACPs) tools will continue to be utilized to identify career paths, barriers to employment, training or service needs, and employability skills. These assessments will also assist with identifying hidden disabilities and the potential need for accommodations.

CareerSource Polk will implement policies to support accessibility to services throughout the state. Development of a Reasonable Accommodation Policy will be explored that requires the WDBs to formally track when a reasonable accommodation is requested and whether it is approved or denied. This policy may include, but will not be limited to: the process for handling and tracking reasonable

accommodation requests; examples of reasonable accommodations (i.e., frequent breaks, ensuring a quiet testing environment, reading the test aloud); providing training and information regarding One-stop procedures; and a process for notifying the state regarding the approval/denial of the request(s). The state will track both informal and formal complaints received in the One-stop offices through the State's Quarterly Customer Service Record Log, This will help the state identify any patterns for alleged discrimination of individuals with disabilities.

## LOCAL WORKFORCE DEVELOPMENT AREA VISION AND STRATEGIC GOALS

(1) Describe the local board's strategic vision and goals for preparing an educated and skilled workforce (including youth and individuals with barriers to employment) including goals relating to primary indicators of performance described in WIOA section 116(b)(2)(A) in order to support regional economic growth and economic self-sufficiency (WIOA §108(b)(1)(E)).

CareerSource Polk's strategic vision and goals for preparing an educated and skilled workforce seek to engage not only our business, education and economic development partners, but to also recognize value and necessity recruiting and retaining a qualified team of workforce professionals who are willing and capable of carrying out our mission. Our primary mission and vision at CareerSource Polk is to be the innovative leader to ensure and sustain a quality workforce for today and the future. The realization of this mission begins with the level and caliber of staff we employ. With that mission in mind, our strategic goals include the following:

- **Staff Engagement Goal:**

To recruit, effectively train, and retain a team of workforce professionals who are aware of, clearly understand and are motivated to embrace our mission by demonstrating a commitment to such. To accomplish this mission, training and development is our number one priority. A critical component of staff development and training includes not only understanding the importance of meeting the negotiated performance measures, but also recognizing the importance of quality performance as it relates to servicing each and every customer we encounter and helping them to meet their individual employment goals.

We place a significant amount of emphasis on assessing staff needs, training to address any gaps, evaluating the effectiveness of training, and conducting quality assurance reviews that include the review of every single customer's case to

ensure quality touch points and service levels that seek to get each customer to their final destination of self-sufficient employment.

We believe that a well-qualified and appropriately trained workforce for our very own workforce system has a direct impact on (1) the types of goals set by and with our clients and, (2) each client's motivation to achieve a greater level of education and/or training that will result in higher wage jobs. Helping clients reach their full potential through education and training will also strengthen employability skills, increase placement rates and yield higher levels of job retention.

- **Board Engagement Goal:**

To recruit, educate, and engage board members who are willing to invest the time necessary to understand the workforce system and clearly envision the alignment of workforce, education and economic development for the sole purpose of ensuring a qualified workforce. Board members engage by bringing their expertise to the table to develop strategies and policies that are designed to aid workforce clients in meeting their full potential with regard to career pathways, education and training opportunities to realize those pathways, and career guidance that supports their efforts to obtain and retain employment that will ensure job satisfaction, retention, and self-sufficiency.

- **Economic Development Partners Engagement Goal:**

Our primary focus with regard to engaging and being engaged with our economic development partners is to ensure that expanding and new businesses are fully aware of the talent pool within our region and the surrounding areas so that they are able to make well informed choices about their recruitment needs and the labor market variables that impact their recruitment and retention efforts.

As a single county region with 17 municipalities, our goal is to be involved with all of our chambers of commerce and economic development organizations via our workforce system leadership staff and/or board members so that we know

firsthand the skills and talent needed to fulfill our businesses workforce needs and convey those needs to appropriate partners so that our missions are aligned.

- **Education & Training Partners Engagement Goal:**

Our education and training partners are essential to the success of our mission. The Board is fully aware of the value of our education partners and the need to ensure that training and education are closely aligned with the workforce needs of our business partners. As stated in our mission, one of our primary goals is to ensure an educated (qualified) workforce. Our board works diligently with our education partners to increase the level of graduates who obtain their high school diploma or GED in order to expand workforce and training opportunities.

We partner with both education and economic development partners to enhance placement efforts of our local college graduates into careers that align with their education and goals, all the while, fulfilling the talent needs for our business community. The board works to ensure ongoing planning, communication, and strategic alliances with our education and training partners that will result in the successful placement of job seekers into jobs that are a good match for the business needs, thereby yielding greater levels of employer and employee satisfaction and retention.

- **Business Partners Engagement Goal:**

Our goal to fully engage business partners in our planning and training efforts seeks to ensure that our business' needs are being met. Through the ongoing surveillance of business needs, we continuously align our programs and service delivery strategies and policies to ensure that our system is business-friendly and demand-driven.

Current challenges and strategies include

CHALLENGE	STRATEGY
The Business Services Division must maintain knowledgeable staff to communicate the value of CareerSource Polk’s workforce services to businesses and community organizations.	Business Services staff will receive ongoing training in business services related topics and will further identify and develop relationships with business and community organizations.
Using technology effectively to advance sector strategies.	Business Services staff will receive ongoing training on the use of customer relationship management databases, such as: <ul style="list-style-type: none"> <li>• <a href="http://www.salesforce.com">www.salesforce.com</a></li> <li>• Florida Occupational Supply Demand System</li> <li>• <a href="http://www.employflorida.com">www.employflorida.com</a></li> <li>• Infogroup Employer Database</li> </ul>
The perception that the Business Services Division primarily provides services related to entry level and lower-wage occupations.	Through the use of databases and customer relationship management, further develop the relationship with high skill/high wage employers and those whose employment opportunities are on the career path to high skill/high wage jobs.

We will continue to identify and address any challenges employers note in accessing workforce services; work to enhance employer satisfaction, and measure effectiveness of employer outreach programs.

**(2)** Describe the local area’s strategy to work with entities that carry out the core programs to align resources available to the local area to achieve the strategic vision and goals established by the local board.

CareerSource Polk staff, in collaboration with the Board of Directors and its Councils, service providers and partners, will work together to analyze and interpret Labor Market Information in developing programs and opportunities that will align the best interests of job seekers and employers with the economic future of the county.

The Workforce Performance Council will continue to recommend policies and strategies to improve the quality of jobs filled by the underemployed, including researching, addressing and improving the types of training and delivery systems available to incumbent workers. The Council will continue to review the Labor Market Information and other pertinent information in the process of designing strategies to address training related to high skill/high wage issues.

The Youth Development Council will continue to design and recommend the delivery of service strategies that address the need to prepare young people and others new to the workforce for employment or transition to additional education beyond high school.

CareerSource Polk partners with the Department of Vocational Rehabilitation and refers individuals with disabilities that otherwise cannot be assisted at the One-Stop career center.

- (3)** Describe the actions the local board will take toward becoming or remaining a high-performing board, consistent with the factors developed by the state board pursuant to section 101(d)(6) of WIOA.

CareerSource Polk has engaged in a comprehensive accountability model that aims to ensure a service delivery strategy that positions the customer at the forefront of all we do. We will continue to seek innovative approaches to service delivery that align with the rapid growth, generational and technological changes in our workforce.

A monitoring plan is in place to review Board policies, practices, and fiscal and programmatic operations, which is conducted by a third party on a quarterly basis every fiscal year. Monitoring reports, along with the Corrective Action Plans are provided to the Board, through the appropriate Council for full review and comment. The Councils review the reports and address concerns to the Board staff on a quarterly basis.

Once each program year, we are also monitored by the DEO which conducts a fiscal and programmatic review. Results are shared with the Board of Directors through the appropriate Councils for full review and comment. The Councils review the reports and address concerns to the Board staff on a quarterly basis.

A Financial Audit is performed by a third party audit firm annually, which is shared with the Board of Directors.

CareerSource Polk's Workforce Performance Council reviews, on quarterly basis, all customer concerns and addresses those concerns with the One-Stop Operator. The goal of this process is ensure that customer concerns are being addressed timely and effectively and to determine if any workforce policy or procedure is impeding staff's ability to deliver quality customer service to our customers.

- (4)** Describe service strategies the LWDB has in place or will develop that will improve meeting the needs of customers with disabilities as well as other population groups protected under Section 188 of WIOA and 29 CFR Part §38.

CareerSource Polk career centers strive to be physically and programmatically accessible to all customers, including individuals with disabilities. All of CareerSource Polk's facilities are ADA compliant providing necessary accommodations, adequate space for the use of assistive devices or personal assistants, allowing individuals to participate in the full range of programs.

CareerSource Polk supports individuals with limited English proficiency, employing bilingual staff and providing printed material in several languages. We will continue collaborating with partners to provide services, resources and referrals to limited English speaking jobseekers. Local Adult Education programs offer Adult English for Speakers of Other Languages (ESOL) instruction for adults to improve their English speaking and writing skills but also to improve their academic skills so they can earn a high school credential and enter postsecondary education to improve their career options.

Equal Opportunity evaluates each CareerSource Polk facility at least every three years to ensure compliance with ADA standards.

CareerSource Polk staff members receive training on disability awareness, sensitivity and etiquette; and outreach for employers and federal contractors that are required to comply with Section 503 of the Rehabilitation Act. In addition, select staff is trained to enroll SSA beneficiaries in the Ticket to Work program. Individuals requiring additional services may be referred by staff to other agencies. In addition, Vocational Rehabilitation is co-located in our one-stop service delivery system.

CareerSource Polk offers a variety of resources and information on services available to persons with disabilities including: information on training opportunities and links to online training; technology guides for using screen enlargement software, screen reading software, Windows Accessibility features, American Sign Language interpreters, referral to the Abilities work portal on [www.employflorida.com](http://www.employflorida.com), and the Text Telephone or Teletypewriter for the Deaf (TTY); information on the ADA and accessibility; links to service providers and resources to assist persons with disabilities in removing barriers to employment; and links to information for employers interested in hiring a person with a disability including tax benefits, the ADA and accommodations.

- (5)** Describe the process used to develop your area’s vision and goals, including a description of the participants in the process.

The CareerSource Polk Board of Directors in collaboration with the CEO established the vision and goals through ongoing dialogue about the critical components needed to meet customer needs through collaborative partnerships. Each council of the Board contributed to the discussion during council meetings based on the analysis of changing markets, prior performance and the necessity for emphasized accountability to ensure customer success.

**(6)** Describe how the LWDB's goals relate to the achievement of federal performance accountability measures to support economic growth and self-sufficiency (WIOA §108(b)(1)(E)).

CareerSource Polk's strategic vision and goals for preparing an educated and skilled workforce seek to engage not only our business, education and economic development partners, but to also recognize value and necessity recruiting and retaining a qualified team of workforce professionals who are willing and capable of carrying out our mission. Our primary mission and vision at CareerSource Polk is to be the innovative leader to ensure and sustain a quality workforce for today and the future.

The LWDB's goals are consistent with the State goals. LWDB will follow the lead of the State in negotiating performance for the performance accountability measures for the Region based on previous performance, local economic indicators and labor market data for the area.

**(7)** Indicate the negotiated local levels of performance for the federal measures (WIOA §108(b)(17)).

Measures	PY 2018-2019 Performance Levels	PY 2019-2020 Performance Levels
<b>Adults:</b>		
Employed 2nd Qtr After Exit	85.0%	85.2%
Employed 4th Qtr After Exit	82.5%	83.0%
Median Wage 2nd Quarter After Exit	\$6,850	\$6,900
Credential Attainment Rate	63.0%	65.0%
<b>Dislocated Workers:</b>		
Employed 2nd Qtr After Exit	83.0%	83.0%
Employed 4th Qtr After Exit	79.0%	79.0%
Median Wage 2nd Quarter After Exit	\$6,850	\$6,900
Credential Attainment Rate	68.0%	68.0%
<b>Youth:</b>		
Education and Employed 2nd Qtr After Exit	75.0%	75.5%
Education and Employed 4th Qtr After Exit	69.0%	69.2%
Credential Attainment Rate	75.2%	75.5%
<b>Wagner-Peyser:</b>		
Employed 2nd Qtr After Exit	62.0%	62.0%
Employed 4th Qtr After Exit	64.0%	64.2%
Median Wage 2nd Quarter After Exit	\$4,750	\$4,800

(8) Describe indicators used by the LWDB to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers, and the one-stop delivery system in the local area WIOA §108(b) (17)).

Local levels of performance and effectiveness of the fiscal agent is measured by comparing the actual level of activities provided under the different programs against state negotiated goals. It is also measured by program efficiencies and maximization of financial and human resources. Programs included are: youth program, adult and dislocated worker programs, adult education and literacy activities, employment services program, other services provided under Title I of the Rehabilitation Act of 1973. Primary indicators of performance are described below:

- 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 obtained 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
- The percentage of program participants who, during a program year, are in education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains toward such a credential or employment; and

The indicators of effectiveness in serving employers established.

**(9)** Describe the definition of “self-sufficiency” utilized by your local area (WIOA §108(b)(1)).

LWDA’s self-sufficiency definition is based on whether the individual at the time of application is employed. The LWDA provides a separate self-sufficiency definition for dislocated workers. The Region also uses the self-sufficient wage to measure performance outcomes.

- The definition of self-sufficiency for adult-employed workers is the local LLSIL as annually published by the Department of Economic Opportunity for eligible adults.
- The self-sufficient wage for dislocated workers is the LLSIL as annually published by the Department of Economic Opportunity or 80% of the layoff wage, whichever is greater.

Self Sufficiency for recipients of public assistance, and people with disabilities and other barriers to employment:

WT/TANF programs are defined as follows:

- ✓ For WT/TANF – 69% of the LLSIL
- ✓ For SNAP – 67% of the LLSIL

## COORDINATION OF SERVICES

- (1) **Coordination of programs/partners:** Describe how individualized career services will be coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, Temporary Assistance for Needy Families (TANF) and Adult Education and Literacy activities. Specify how the local area coordinates with these programs to prevent duplication and improve services to customers.

Partnerships provide the framework necessary to carry out the strategic imperatives. CareerSource Polk will continue to work with core and partner programs to leverage resources by developing and maintaining key partnerships with the Polk County Public Schools – Adult Education, Vocational Rehabilitation, Health Department offices, Department of Juvenile Justice, representatives of targeted industries, chambers of commerce, trade associations; and economic development entities, public and private educational institutions, community and faith based organizations; organized labor; the area’s local elected officials; and state agencies, including Department of Children and Families.

We work with partners through Memorandum of Understanding (MOU) which sets forth the terms for cooperation and consultation between the partner and the Board with regard to the workforce program services to be delivered by staff in a coordinated, seamless and customer friendly manner within the local one-stop career centers.

A partner’s work group is established and meets on a regular basis to consider ideas, discuss agency initiatives and goals and how partner agencies can help in achieving them. The group’s main focus will be to maximize the quality of supported employment service delivery, ensure a comprehensive, efficient and effective referral process and the coordination of intensive vocational services. We will continue to work to ensure career centers are available to serve all job seekers

regardless of obstacles to employment, level of need or degree of career development.

CareerSource Polk provides a common service flow for customers starting when a jobseeker visits our website, utilizes the Mobile Unit, or enters one of the sites. Each location, physical and virtual, provides information on the various services offered, delivers an orientation, and gives the jobseeker an opportunity to take advantage of services through registration. Once a jobseeker visits CareerSource Polk's website or a physical location, they start benefiting from our services including those provided by our local staff and partner staff (DEO, School Board, AARP, Job Corps, Agricultural and Labor Program Inc., Department of Children and Families, etc.) Orientations and intake services can begin online or at the center or mobile unit. On occasion, we bring WIOA services to our training providers to save customers an additional stop at one of our centers.

A jobseeker may fall into one or more categories (e.g., WIOA, WT, Veteran, MSFW, Dislocated Worker, etc.). Regardless of how the jobseeker is classified in terms of service or funding needs, our fully integrated staff is available to assist the customer with all the services. A staff member is assigned to work with the customer throughout the process, including referral to a one-stop partner if needed. The staff member is responsible for delivery of career services and the coordination of trainings, OJT, paid and unpaid work experience, etc., through programs like WT and WIOA. They are also responsible for job placement and retention. Our customers rely on this integrated model to create a seamless, easy-to-use experience that actually delivers on its promise to ensure and sustain a quality workforce for today and in the future.

We coordinate with Local Education Agencies (LEAs), adult education agencies, county human service offices, juvenile justice and local law enforcement agencies, local housing authorities, Vocational Rehabilitation, Department of Children and Families, economic development entities and other community and faith-based

organizations to ensure all customers have access to all the services they need to be successful in training activities and find employment.

### **Adult Basic Education**

Adult basic education is a critical partner in establishing career pathways for adults who are deficient in basic skills. CareerSource Polk partners with the Polk County Public Schools who provides a full range of adult basic education services from beginning level literacy through high adult secondary and transition activities to support college and career readiness; these services include English language acquisition activities where needed. Programs provide basic skills instruction in the context of work readiness and incorporate workplace preparation activities and career awareness and planning in instruction and services. Programs provide case management services to their students in two key areas: 1) helping students address barriers to participation in adult basic education programming and 2) helping students prepare and plan for entry onto a career pathway through employment and/or postsecondary education/training.

Through our partnership with the Polk County Public Schools, we are able to refer customers with language barriers to the English for Speakers of Other Languages (ESOL) program. The program is designed to meet the diverse needs of English language learners who come from home environments in which the native language is other than English. The program has six levels of ESOL classes. Customers are placed in a level based on their current ability to read, write, and understand English

CareerSource Polk also partners with READ Lakeland, a nonprofit 501(c) (3) organization dedicated to improving the quality of life in our community. More than 100 volunteers offer free services to those who want to better their skills. Whether it's reading, writing or math, tutors are trained accordingly to provide one-on-one or small group instruction.

READ Lakeland, Inc. recruits, assesses, matches, tutors, and reassesses motivated adult learners, until they reach their literacy goals and/or transition into a higher level program such as GED preparation, a vocational school, or even Polk State College. They provide the instructional materials used by tutors and students, basic and continuing training for tutors, and personal contact to support students in reaching their educational goals.

### **Vocational Rehabilitation**

The Department of Vocational Rehabilitation (VOR) provides vocational rehabilitation services to help persons with disabilities prepare for, obtain, or maintain employment. VOR provides services to eligible individuals with disabilities, both directly and through a network of approved vendors. Services are provided on an individualized basis. The VOR counselor, during face-to-face interviews, assists customers in selecting their choice of vocational goals, services and service providers. An Individualized Plan for Employment (IPE) is developed, outlining a vocational objective, services, providers and responsibilities. Counseling and guidance, diagnostic services, assessments, information and referral, job development and placement, and personal services such as readers or sign language interpreters are provided at no cost to the individual. VOR will collaborate with partners in the workforce and education systems to develop strategies for streamlining and enhancing service planning and delivery.

### **Division of Blind Services**

CareerSource Polk provides customers with universal services at the One-Stop career centers, including screen reading adaptive technology Job Access with Speech (JAWS) in both the resource room and the assessment centers, and documents in an accessible format upon request. Additional services are coordinated through partnerships with the Vocational Rehabilitation, Florida Division of Blind Services, and Lighthouse for the Blind. CareerSource Polk will continue to work to connect individuals with disabilities with employers. We encourage

employers to use the Employ Florida portal, Abilities Work, a resource to support the linkage of employers to qualified job seekers with disabilities.

CareerSource Polk is an employment network under the Ticket to Work program. While participation in the program is voluntary, staff assists individuals that are Ticket eligible regardless of whether or not their ticket is assigned to CareerSource Polk.

### **Department of Children and Families**

The Department of Children and Families (DCF) is dedicated to ensuring that families have the highest quality of services available in their times of need. They work in partnership with CareerSource Polk and many other local communities to protect the vulnerable, promote strong and economically self-sufficient families, and advance personal and family recovery and resiliency. DCF has established a new partnership with CareerSource Polk and is co-located in the Winter Haven and Lakeland career centers to expand the services and opportunities for their customers including Supplemental Nutrition and Assistance Program, cash assistance, WIOA, and referrals to other community resources.

**(2) Coordination with Economic Development Activities:** Describe how the local board coordinates workforce investment activities carried out in the local areas with economic development activities carried out in the local area (or planning region) in which the local area is located, and promotes entrepreneurial training and microenterprise services. WIOA §108(b)(5).

CareerSource Polk works closely with all of the various economic development organizations in the region including, the Central Florida Development Council, Lakeland Economic Development Council, Bartow Committee of 100, Winter Haven Economic Development Council, Polk Vision, and Chambers of Commerce located throughout the county.

The Business Services Division and economic development organizations meet with businesses that want to move to or expand their operations in Polk County, and work collaboratively to increase the diversity of job opportunities in the region. Staff regularly attend chamber of commerce functions, and are guest speakers as a means of publicizing our services and activities. The Region also provides entrepreneurship training and works with the Small Business Development Center (SBDC), which is funded in part by the U.S. Small Business Administration (SBA), Defense Logistics Agency, State of Florida and other private and public partners. Staff from the SBDC has provided training to Business Services Division staff, Business Services Division staff refers employers to the SBDC office for assistance, and the SBDC staff has been guest speakers and exhibitors at CareerSource Polk events. In addition, all Individual Work Plans developed for Social Security Ticket to Work participants include information on how to contact the SBDC for assistance in starting a business.

- (3) Coordination of education and workforce investment activities:** Describe how the local board coordinates education and workforce investment activities carried out in the local area with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services. WIOA §108(b)(10).

Coordination of education and workforce investment activities must be linked to employment opportunities in the local area. The local area contracts with education and training providers whose measurable performance qualifies them to receive WIOA funds to offer a wide variety of training programs and occupational choices to eligible customers. The Regional Targeted Occupations List (RTOL) is the document that determines the occupations for which training may be sponsored. The targeted occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both high demand and high skill/high wages.

CareerSource Polk's workforce development strategy is intricately tied to education, starting with the secondary school system to include career and technical schools and continuing through postsecondary education to include our local state college, and public and private colleges and universities. All core programs have a history of engaging with the education system, in particular the career and technical schools and local colleges, and will continue to develop those relationships.

CareerSource Polk partners with Polk County Public Schools in providing services to individuals enrolled in the GED program. Our mobile unit travels to specific locations, as requested, removing the transportation barrier for some while providing immediate access to technology to other customers. We also host GED classes our Winter Haven career center and assist with funding GED tests.

CareerSource Polk partners with post-secondary educational institutions allowing them to make presentations to our customers about their various training programs.

Some staff are out-stationed at or visit the various post-secondary educational institutions, which allows students for immediate access to program and services information provided by CareerSource Polk.

There has also been significant collaboration between CareerSource Polk and Polk State College which has been the recipient of two Trade Adjustment Assistance Community College Career Training (TAACCCT) grants. The grant was used to develop curriculum and customize programs to re-train dislocated workers in Advanced Manufacturing. The grant helped prepare dislocated workers and other unemployed individuals for careers in advanced manufacturing. CareerSource Polk will analyze the results of the projects and utilize best practices and lessons learned to help improve the broader workforce development system.

In serving individuals with disabilities, CareerSource Polk will continue to work collaboratively with local community/state colleges, career and technical schools to explore the development of training programs that are implemented with universal

design to train individuals with disabilities for competitive, integrated employment in jobs that meet local labor market demand.

- (4) Coordination of transportation and other Supportive Services:** Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of transportation, including public transportation, and other appropriate supportive services in the local area. WIOA §108(b) (11).

CareerSource Polk provides funded support services to those who are eligible under governing rules and regulations for the type of funding deemed appropriate and allowable. Limitations on funds will not affect the amount that we provide as the limit is already relatively low. Therefore, CareerSource Polk funded support services will be provided to those who are eligible until funds are exhausted.

Supportive Services may be provided for Welfare Transition, WIOA Youth, Adults, and Dislocated customers who are participating in authorized program activities and who otherwise are unable to obtain such supportive services.

The Local Board will consider payment for customer support needs that will remove barriers, enable the customer to attend and/or to remain in training, prepare for and actively participate in work related activities that will allow them to attain and remain in full-time permanent employment, including but not limited to job search, post placement employment and community work experience.

Services are coordinated for customers to receive, based on need, support services in an amount up to \$650 for transportation needs, inclusive of fuel cards, bus passes and limited vehicle repairs. Other supportive services may include ABE/GED classes, clothing, medical services and child care referral services.

CareerSource Polk is actively engaged with Polk County Transportation Disadvantage Local Coordinating Board, which addresses issues related to transportation for the disable, elderly, disadvantaged and blind services.

**(5) Coordination of Wagner-Peyser Services:** Describe plans and strategies for, and assurances concerning, maximizing coordination of services provided by the state employment service under the Wagner-Peyser Act (29 U.S.C 49 et seq.) and services provided in the local area through the one-stop delivery system to improve service delivery and avoid duplication of services. WIOA §108(b)(12).

CareerSource Polk maximizes the labor exchange services provided by Wagner-Peyser staff in many ways, starting as the initial point of contact with individuals who are seeking employment and employers who are seeking employees. We present the delivery of services as a seamless system to all individuals. In striving to provide the best services to customers, we train our staff to assist customers and make their participation experience an effective one, meeting their needs and providing excellent customer services during their participation in one-stop activities.

We provide orientation to the services available through the One-Stop career center and assess customer's skills levels and abilities to determine job readiness and provide immediate assistance with job matching of employer job requirements and screening for supportive service needs. Career Services are provided to all customers who are primarily seeking employment assistance, both self-service and assisted, including customers seeking veteran's services that have no identified significant barriers. Customers are registered in Employ Florida (EF).

In order to improve the service delivery and avoid duplication of services, CareerSource Polk maximizes its resources by working cohesively with partners. Partner's staff participates in cross training sessions related to customer service, eligibility, resources, referrals and performance issues, which empowers them to effectively identify and assist customers according to their needs.

- AARP Senior Citizen Supported Employment Program- staff is co-located in the Winter Haven career center and assist customers with Resource Room services.

- The Agricultural and Labor Program, Inc. - staff is co-located in the Lakeland career center and assist customers with housing, transportation and utilities as well as training and employment.
- Job Corp - staff is co-located in the Lakeland career center and assist eligible youth customers with engaging in alternative residential education and job training.
- Polk County Drug Court – CareerSource Polk provides the mobile unit services as well as staff to assist individuals referred by the Drug Court system with job search activities.
- Polk County Public Schools - CareerSource Polk partners with Polk County Public Schools in providing services to individuals enrolled in the GED program. Our mobile unit travels to specific locations removing the transportation barrier for some while providing immediate access to technology. We also host GED classes in our career centers, and fund GED tests.
- REBUILD Florida – is co-located in the Winter Haven career center to assist Polk county residents with long-term recovery efforts from recent hurricanes.

Our partnership with the above listed partners allows us to enhance the participation and performance of customers served through the system.

**(6) Coordination of Adult Education and Literacy:** Describe how the local board coordinates workforce investment activities carried out under this title in the local area with the provision of adult education and literacy activities under Title II in the local area, including a description of how the local board carries out, consistent with subparagraphs (A) and (B) (i) of section 107(d) (11) and section 232, the review of local applications submitted under Title II. WIOA §108(b)(10).

CareerSource Polk partners with the Polk County Public Schools - Adult Education and with Alternative School Opportunities to offer a variety of alternative learning opportunities for adults and youth customers to engage into academics through non-traditional methods.

We continuously meet with the Polk County Public Schools - Adult Education to strengthen partnership and to collaborate on various grant opportunities.

At the local level, some adult education providers have developed relationships with postsecondary education providers. Students who do not earn a high enough score on placement tests at the postsecondary institution are referred to a local adult basic education program for remedial work. After the student has demonstrated sufficient academic progress at the local adult education program, as determined by an approved standardized test, the student is referred back to the postsecondary institution.

- a. **Reduction of Welfare Dependency:** Describe how the local board coordinates workforce investment activities to reduce welfare dependency, particularly how services are delivered to TANF and Supplemental Nutrition Assistance Program (SNAP) recipients, to help individuals become self-sufficient.

**Welfare Transition Program:**

We often co-enrolled participants in the WT Program in adult education/literacy training and in WIOA to provide training opportunities, while WT provides support services. Classroom training and OJTs are also coordinated effort between programs. For WT participants who are medically deferred or have documented disabilities, we refer them to VR or the Division of Blind Services, and for legal assistance to apply for SSI or SSDI.

- b. **Supplemental Nutrition Assistance Program**

Participants in the SNAP program may be dually enrolled in the WIOA Adult/Dislocated Workers and/or Youth Services programs to receive education

and training opportunities. Participants are also referred to community partners for adult education/literacy training, legal assistance, and housing. Participants in the SNAP program are provided with assistance for transportation costs related to participation through the Food Stamp Reimbursement (FSR) Program.

- (7) Cooperative Agreements:** Describe replicated cooperative agreements (as defined in WIOA section 107(d)(ii)) between the local board or other local entities described in section 101(a)(11)(B) of the Rehabilitation Act of 1973 (29U.S.C 721(a)(11)(B)) and the local office of a designated state agency or designated state unit administering programs carried out under Title I of such Act (29 U.S.C. 721(a)(11)) with respect to efforts that will enhance the provision of services to individuals with disabilities and to other individuals, such as cross-training staff, technical assistance, use and sharing of information, cooperative efforts with employers and other efforts of cooperation, collaboration and coordination.

CareerSource Polk maintains an Inter-local agreement in partnership with the Chief Elected Official (CEO). The inter-local agreement is developed by the CEO (Polk County Board of County Commissioners) staff in cooperation with the Local Workforce Development Area staff to document the partnership between the two in an effort to meet the requirements of the Workforce Innovation and Opportunity Act, Laws of Florida and any future state and federal workforce initiatives and laws. The agreement is signed by the Board Chair and the Chairman of the Polk County Board of Commissioners.

CareerSource Polk has cooperative agreements (Memorandum of Understanding) between the board and other entities to enhance the provision of services to individuals with disabilities and other individuals. CareerSource Polk currently partners with the Department of Vocational Rehabilitation, which is co-located in one of our career centers. As stated in the MOU, CareerSource Polk will eliminate unwarranted duplication of services through a seamless process, reduce administrative costs, and facilitate joint planning, and facilitate staff development and

training to enhance participation and performance for individuals with disabilities. Vocational Rehabilitation will be familiar with the services provided by the one-stop delivery system and participate on the Partner Management Team and provide for front line participate in Continuous Quality Improvement efforts.

CareerSource Polk also partners with the Polk County Public Schools through a Memorandum of Understanding to facilitate development and training and the implementation of career pathways through the integrated education and training model. The agreement includes the provision of the full array of workforce services provided by CareerSource Polk One-Stop delivery system.

AARP – will provide a mutually agreed number of qualified part time staff to provide the services outlined in the MOU. The local board provides appropriate office space for the AARP representatives, including office furniture, office supplies and computer equipment.

Division of Blind Services (DBS) – DBS partners with career centers and other agencies to support individuals with visual disabilities in achieving employment and independence within the community. DBS district staff provides information such as brochures, website, district contacts, etc., to assist career center staff in referring potential clients to Blind Services. Similarly, DBS may refer clients to the career centers to support their Vocational Rehabilitation goals in addition to Blind Services. Some clients use the services offered by the career centers, such as job searches, resume building, and other employment training activities. The Division of Blind Services will provide information and referral to clients who may benefit from these services. When clients' vision is medically restored, they may be referred to the career center for job matching and placement services (if unemployed). DBS staff may also work with career center staff to identify ways to improve accessibility and customer service for individuals with blindness and low vision.

In light of the WIOA amendments, discussion has been initiated to enhance the provision of the services provided to individuals with disabilities partnering with other agencies.

## DESCRIPTION OF THE LOCAL ONE-STOP SYSTEM

- (1) **General System Description:** Describe the one-stop delivery system in your local area, including the roles and resource contributions of one-stop partners. WIOA §108(b)(6)

CareerSource Polk's delivery of services is carried out through its comprehensive One-Stop delivery system, which integrates the provision of services for unemployed, underemployed and employed workers including WT/TANF and SNAP customers. For WT/TANF customers and others who may require additional education and training, including job readiness, and adult basic education skills training, etc., referrals are made to other partners including, school districts, community-based programs, and faith-based organizations.

CareerSource Polk operates two full service one-stop career centers. Both centers provide WIOA, TAA, WT, SNAP, Veterans, Wagner-Peyser, MSFW and RESEA services. Upon entering a full service career center, job seekers find integrated case management approach to assist these individuals to become competitive for employment. Partners co-located at the one-stop career center include: AARP, ALPI, Job Corp, Rebuild Florida and Polk County Public Schools. Vocational Rehabilitation is located in the same facility, on the third floor.

Services provided include:

### **Workforce Innovation and Opportunity Act (WIOA)**

The WIOA program provides individualized services intended to help job seekers return to the workforce by utilizing general, individual, and if determined eligible, training services. WIOA provides for one-on-one assistance with resumes, interviewing, job search, and career planning. Workers who are either unemployed or working in low-wage jobs may be eligible for supportive services while seeking employment, interviewing or attending training. The primary focus of training is to obtain a certificate or degree of value to the labor market, leading to a job in high

demand occupations and emerging industries. As funding allows, participants may be eligible to receive tuition assistance which may include instructional costs, books, materials, and fees (such as application costs, registration, and laboratory fees).

The target population for WIOA services consist of workers who have lost their jobs due to no fault of their own (dislocated workers); Homemakers who have lost their financial support from a family member; recipients of public assistance and other low-income individuals when funds are limited; employed workers that need skills upgrading or retraining.

### **WIOA Youth:**

The Youth program is designed to guide eligible young adults, through high-quality case management, toward educational attainment which includes career guidance and exploration. Youth services allows for the provision of summer and/or year-round work experience opportunities such as internships and pre-apprenticeships, and skills training along a career pathway for in-demand industries and occupations, including supportive services. The ultimate goal for program participants is either advancement into post-secondary education or the attainment of employment with a family-sustaining or self-sustaining wage. Youth program services are prioritized for out-of-school youth (OSY) and youth with significant barriers, including disabilities, pregnant or parenting, or those subjected to the juvenile/adult justice system.

### **Wagner-Peyser**

Wagner-Peyser provides labor exchange bringing together individuals who are seeking employment and employers who are seeking employees. Through Wagner-Peyser labor exchange system, we have the capacity to assist job seekers to find employment; assist employers in filling jobs, and facilitate the match between job seekers and employers.

### **Welfare Transition/TANF**

The Welfare Transition Program (WTP) provides emphasis on work, self-sufficiency, and personal responsibility; as well as opportunities for welfare recipients to move

from welfare to work. The support structure includes the programs and services such as: employment programs, job training, child care and transportation assistance; diversion programs to reduce domestic violence and child abuse; diversions to prevent families from going on welfare and relocation assistance.

### **Supplemental Nutrition Assistance Program (SNAP)**

The Supplemental Nutrition Assistance Program emphasizes work, self-sufficiency, and personal responsibility. Program participants gain valuable skills, training, and work experience in an effort to reach total self-sufficiency.

### **Reemployment Services and Eligibility Assessment (RESEA)**

The program provides re-employment services to pre-selected UC claimants that are most likely to exhaust their unemployment benefits. The services provided include, but are not limited to:

- Orientation and Assessment
- Labor market information unique to area of work experience
- Developing an employability development plan
- Job and additional services referrals
- Follow-up to further assist in their employment efforts

### **Migrant Seasonal Farmworker (MSFW)**

CareerSource Polk is committed to serving farmworkers who work in the Polk County service area. The MSFW Outreach Specialist assigned to our Region is bilingual and is accustomed to serving the farmworker population and employers located within Polk County. Our MSFW Outreach Specialist works jointly with the agricultural employers and directly with the farmworkers to deliver available employment services and knowledge of services available in our One-Stop career center and other agencies available to the farmworkers to promote quality of the labor exchange and quality of life for farmworkers in our service area.

### **Trade Adjustment Assistance (TAA)**

Trade Adjustment Assistance (TAA) helps workers who are adversely affected by foreign imports or job shifts to a foreign country. Assistance is provided to eligible

workers in the form of reemployment services, training, job search, relocation, and support benefits in the form of Trade Readjustment Allowances (TRA) and/or Alternative/Reemployment Trade Adjustment Assistance (ATAA/RTAA) for older workers.

DEO Merit Staff maintain familiarity with TAA requirements, screening and determination applicability. As part of the TAA Information Meeting, and in any subsequent contact, the local TAA Coordinator will emphasize the importance of receiving an assessment prior to their enrollment in training deadline. Any affected workers requesting TAA assistance that may be coming from outside the region are referred to the local designated TAA staff.

### **Veteran Services**

Our region utilizes an electronic tracking system for all customers that enter the One-Stop Career Center. Veterans are identified in a prominent manner on this system which allows all Wagner-Peyser staff to see the next available customer. Those identified by the VET status will be provided service before non-VETs by Wagner Peyser staff.

Veterans and eligible spouses have priority of service in the Resource Room and for all programs operated by the Region and are seen immediately. Veterans are offered the full range of One-Stop services to include job counseling, job search/referral, resume services, as well as specialized assistance on Veterans rights and benefits as well as assistance and interface with the Veteran's Administration (VA) programs.

A. Describe how required WIOA partners contribute to your planning and implementation efforts. If any required partner is not involved, explain the reason.

CareerSource Polk enjoys strong partnerships with required and non-required One-Stop partners. Through these partnerships, attempts are made to minimize duplication of services and leverage resources to ensure efficient use of funds in our region. All partners are allowed, encouraged and applauded for participation

in our quarterly Partner Management Team meetings which allow full disclosure of each agencies services, successes and concerns. Discussions at meetings include full engagement of partners with various agency plans, participation on task forces and/or committees and collaboration on grant opportunities that will benefit the region.

All partners are allowed and encouraged to become Tier 1 certified, providing access to Employ Florida and allowing partner agencies to make job referrals.

Vocational Rehabilitation, Polk County Public Schools GED Program, ALPI and Job Corps provide services at the One-Stop career centers. All other partners are located at their own facilities. CareerSource Polk also provides the rural community with services on the Mobile One-Stop Unit as needed.

Several of our strategic partners serve on the CareerSource Polk Board and/or the Youth Development Council.

CareerSource Polk maintains an electronic distribution list of partners and uses it regularly to inform partners of workforce activities, including job fairs, grant opportunities, recruitment events, equipment availability through our disposal process, etc.

Partners are essential to CareerSource Polk's planning and implementation efforts, as they contribute to our goal of providing seamless and integrated employment services for our customers through the One-Stop delivery system.

B. Identify any additional partners included in the local one-stop delivery system.

- Rebuild Florida

C. The local workforce development board, with the agreement of the chief elected official, shall develop and enter into a Memorandum of Understanding (MOU) between the local board and the one-stop partners.

These Memorandums of Understanding (MOUs) can be found at [www.careersourcepolk.com](http://www.careersourcepolk.com)

**(2) Customer Access:** Describe actions taken by the LWDB to promote maximum integration of service delivery through the one-stop delivery system for both business customers and individual customers.

A. Describe how entities within the one-stop delivery system, including One-Stop Operators and one-stop partners, will comply with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology and materials for individuals with disabilities, including providing staff training and support for addressing needs of individuals with disabilities. WIOA §108(b)(6)(C).

CareerSource Polk utilizes the EEO monitoring tool to inspect site operations and services, and ensure ADA compliance. Hearing impaired customers are assisted through American Sign Language interpreters, the TTY system and a current staff member with conversational sign language skills. Individuals with visual impairments are assisted through the use of Job Assess with Speech (JAWS) in the resource room and assessment labs, large print copies and electronic copies of documents. In addition, assistance and referrals may be made through Lighthouse for the Blind or the Division of Blind Services. Individuals with disabilities are referred to the Florida Abilities Work portal on [www.employflorida.com](http://www.employflorida.com). The Disability Program Navigator facilitates staff training on providing services, and resources available to, individuals with disabilities.

B. Describe how entities within the one-stop delivery system use principles of universal design in their operation.

The Board assures that the local career center delivery system provides services to all customers consistent with the principles of universal access and in accordance with all relevant laws and regulations, state policies and procedures.

The Board also assures that applicable career services will be provided in at least one physical career center in the workforce area. In the event a facility requires changes to its lay-out, equipment or furniture, a designer may be contracted to ensure the facility remains ADA compliant and is accessible to everyone, regardless of their age, ability, or status in life.

Universal access principles include:

1. Equitable use
2. Flexibility in use
3. Simple and intuitive use
4. Perceptible information
5. Tolerance for Error
6. Low physical effort
7. Size and space for approach and use

- C. Please describe how the LWDB facilitates access to services provided through the local delivery system, including remote areas, through the use of technology and through other means. WIOA §108(b)(6)(B)

Our local delivery system provides ADA compliant facilities in our Winter Haven and Lakeland career centers. Annual reviews by the CareerSource Polk Facilities Manager and the EEO ensure ADA compliance and access to services.

Remote areas are served through our website and social media, the mobile unit, a partnership with members of the Polk County Library Cooperative and other organizations, and co-locating staff at select sites throughout the county. CareerSourcePolk.com and social media (Twitter, Facebook, and LinkedIn) provide information on the services available to employers and job seekers. The mobile unit travels to municipalities, libraries, non-profit organizations and correctional probation offices throughout the county providing job seekers with access to computers with internet service, printers, copiers and fax machines and Career Specialists. CareerSource Polk staff has provided training to Polk

County library staff and agency partners, and provide updates on new job postings, programs, recruiting events, job fairs and other activities via email.

Services are currently provided by stationing staff at different partner locations, i.e. Libraries, Traviss and Ridge Career Centers, Housing Authorities and Community Centers. Staff continues to develop agreements to co-locate staff at additional partner locations as necessary.

- (3) Integration of Services:** Describe how one-stop career centers implemented and transitioned to an integrated, technology-enabled intake and case management information system for programs carried out under this WIOA and programs carried out by one-stop career center partners. WIOA §108(b)(21)

CareerSource Polk facilitates a paperless system that enables workforce system staff to operate more efficiently with greater accountability and allows customer to submit documentation via electronic means without having to present at our physical locations.

We also utilize

Customers are able to complete various program orientations online to avoid long lines and long waits at the career centers.

- (4) Competitive Selection of OSO:** Describe steps taken or to be taken to ensure a competitive process for selection of the one-stop operator(s). WIOA §121(d)(2)(A)

The selection of the One-Stop Operator is procured in accordance with CareerSource Polk's adopted Procurement Policies and Procedures, which incorporates the methods of procurement provided for under 2 CFR 215. The One-Stop Operator facilitates services for workforce program, including; WIOA, TAA, WT, SNAP, Veterans, Wagner-Peyser, RESEA REA, UI, RES-EUC, PREP.

The policy states:

Competitive Proposals – the determination to seek competitive proposals may be made by the President & CEO or by the Board. The President & CEO or the Board will direct Board staff to prepare a Request for Proposals (RFP) to detail the goods or services being sought, the amount the Board intends to spend, the proposal content instructions and the proposal review and award criteria. In determining the amount anticipated to spend, the staff person responsible for preparing the RFP will prepare a cost estimate. This cost estimate will take into consideration such things as:

- What other workforce regions are paying for similar services
- What the Polk County Workforce Development Board is paying for similar services
- Historical data as to what has been paid in the past for similar services, adjusted for inflation and local conditions

Each RFP shall make clear to potential offerors that the issuance of the RFP does not commit the Board to award a contract, pay any costs associated with the preparation of a proposal, or to actually procure the requested service. Each RFP shall also reserve the right of the Board to accept and/or reject all proposals received and to negotiate with all qualified sources.

Once the RFP is fully developed, a legal notice detailing the scope of the RFP, how and when to propose, a contact person at the Board, and other pertinent information will be prepared and published, using the Purchase Order process described above. RFP's will also be advertised in Florida Administrative Weekly and posted at the Board's website, [www.careersourcepolk.com](http://www.careersourcepolk.com).

Prior to the release of each RFP, the President & CEO will appoint a team of at least three (3) Board members and/or staff to review the proposals received. Staff and Board members will be selected based on their expertise in the services being sought and/or the procurement process. These staff will be provided with copies of the RFP and any related documents.

The Board also maintains a current listing of all agencies and organizations that may be potential providers of goods or services solicited. Agencies and organizations on that list will be direct mailed a memorandum announcing the availability of the RFP and a general description of goods or services being sought. The announcement will direct them to call the Board or visit the Board's website to access the full RFP.

A proposer's conference will be held in conjunction with each RFP issued. The conduct of that conference is the responsibility of the staff person who developed the RFP. This responsibility includes a requirement for the production and distribution of conference minutes. Conference minutes made available to all attendees and any other interested parties through the Board's website and copied to the three (3) staff proposal reviewers.

Once an RFP is issued, designated Board staff will be available to answer technical questions only. All potential bidders are required to attend the proposer's conference as the primary venue to have questions addressed.

As proposals are received, they will be date and time stamped on the outside of the envelope/box in which they are received to ensure timely submission. On the specified date at the specified time and location, the Board will open the proposals received. Each proposal's receipt will be recorded on a log that provides the name of the RFP at the top and the name, address and contact person for each proposal opened. Originals will be filed with the Vice President of Operation's office. Copies will be distributed to each member of the review committee.

All proposals meeting the following criteria will be reviewed:

- Submittal on or before the deadline specified
- Submittal in the format specified
- Proposal is responsive to the RFP

Staff reviewers will read and rate each proposal independent of one another, using the objective rating criteria contained in the RFP. Rating criteria may include, but will not necessarily be limited to:

- Past performance of the proposer in the services solicited
- Fiscal accountability of the proposer
- Ability of the proposer to meet performance objectives
- Reasonableness of the proposed costs
- Quality of the services proposed
- Qualifications of staff to deliver the proposed services
- Proposer's demonstrated ability to serve targeted populations, if any

Once reviewers complete their independent scoring of the proposals, they will meet and finalize the proposal rating process. Based on their independent rating of each proposal, the team will formulate written recommendations to the President & CEO for presentation to the Board. The President & CEO will schedule the recommendations for consideration to the appropriate committee of the Board in a timely manner.

The Board Committee may elect to accept, accept with modifications or reject the staff recommendations. Where a recommendation to fund is made, the Committee Chair will request that the Executive Committee place the recommendation on the agenda of the next Board meeting. The Full Board then either accepts, or accepts with modifications, or rejects the committee recommendation. Board approval constitutes staff authorization to proceed with contract negotiations.

Actual funding of any proposal is contingent upon:

- Successful negotiation with the service provider
- Acceptance by the service provider of the Board's contract terms and conditions
- Reference checks, as required

In addition, prior to the execution of each contract, Board staff must determine that each service provider meets the following requirements:

- Has adequate financial resources or the ability to obtain such
- Has the ability to meet the performance goals, program specifications and conditions and to do so at a reasonable cost
- Has a satisfactory record of past performance
- Has a satisfactory record of business ethics and fiscal accountability
- Has the necessary organization, experience, accounting and operational controls, as well as the technical skills to perform the contracted work

The Board's Vice President of Operations or other designated staff person will proceed with contract negotiations as directed by the Board. Negotiations will include the establishment of performance standards and the conduct of a full price analysis. Where profit is allowable, it will be negotiated separately from the line-item budget. The amount of profit allowed will be associated with contractor risk and reasonableness considering the work being performed.

The final agreed-upon contract document will be presented to the President & CEO for review and approval. The President & CEO has signatory authority for all contracts. Once fully executed (signed and dated by both parties), the Vice President of Operations will issue an Authorization to Proceed memorandum to the contractor.

Competitive procurements will be fully documented. Procurement files will be established and maintained by the Planning and Contracting Office and will include, at a minimum:

- Solicitation (cost/price estimates, the RFP, legal advertisements and other announcements, bidder's list and proposer's conference minutes);
- Proposals submitted (full submission of each proposal, whether selected for funding or not, along with transmittal attachments, staff summaries of proposals, if any);
- Evaluation of Proposals (completed rating sheets – in ink and signed by each rater – summaries and tabulations of ratings and staff recommendations)

- Board actions (record of committee and/or full board actions, copies of letters sent to each proposer announcing Board actions; and
- Contract negotiations (documentation of the significant history of the negotiations, documentation of the cost/price analysis conducted).

The Board will maintain, for three (3) years, those written records specified above. This extension period will be extended until such time as all audits, claims and litigation, if any, have been fully resolved.

**(5) System Improvement:** Describe additional criteria or higher levels of service than required to respond to education/training needs, labor market, economic, and demographic conditions and trends in the local area (WIOA §108(b)(6)(A)).

The Board will continue to follow the state's certification policy.

## DESCRIPTION OF PROGRAM SERVICES

(1) **System description:** Describe the local workforce development system. Identify programs included in the system and how the local board works with each entity to carry out core programs and other workforce development programs supporting alignment in provision of services. Identify programs of study authorized under The Strengthening Career and Technical Education for the 21st Century Act (Perkins V) (20 U.S.C. 2301 et seq.), that support the strategy identified in the Florida Unified Plan under WIOA section 102(b)(1)(E) (WIOA §108(b)(2)).

The Local Workforce Development Board provides the delivery of services as the One-Stop Operator. CareerSource Polk (CSP) is the administrative entity, grant recipient and fiscal agent for the workforce development funds allocated to Polk County. CSP plans and oversees the local workforce development programs in partnership with local elected officials, procures service providers, as needed, identifies providers of training services, negotiates local performance measures and monitors system performance against the established performance measures, and manages accounts for all workforce funding allocated. All programs and activities in the CSP one-stop career center system are coordinated and have an integrated service delivery structure to facilitate improved outcomes and excellent customer experiences for both employers and career seekers.

CSP employs universal design principles in the operations of the career centers to facilitate access to include partner programs and community based organizations who serve individuals with barriers or obstacles to employment. Staff at the career centers are cross-trained on all core programs and are familiar with the resources or services provided by community organizations, which facilitates co-enrollment in programs, the development of career pathways and improves access to activities that lead to post-secondary, and industry recognized credentials.

CSP's goal is to prepare a skilled workforce for existing and emerging in-demand occupations in order to meet the employment needs of business in the LWDA.

CSP's Board of Directors, which includes the core partner programs and business members, allows us to identify and address the education and skills needs of the local workforce and the specific needs of local employers.

Workforce development programs included in the system are:

Career Services: provided to all individuals seeking employment assistance, both self-service and assisted. Individuals are registered in Employ Florida (EF). Services include:

- Orientation to the services available through the One-Stop Center for all service seekers;
- Outreach, recruitment and intake;
- Initial assessment of skill levels, aptitudes and abilities in order to determine job readiness;
- Matching of employer job requirements and screening for supportive service needs;
- Job search and placement assistance, including job workshops, job referrals and job development;
- Provision of employment statistics information which includes job vacancy listings in the local, regional and national labor market areas;
- Information on job skills necessary to obtain the jobs described in the statistics and information relating to local occupations in demand and the earnings and skill requirements for such occupations;
- Provision of information regarding the performance of the Board in regards to the performance measures and any additional performance information with respect to the Board's One-Stop delivery system;

- Provision of accurate information relating to the availability of supportive services, including childcare and transportation available in Polk County, and referral to such services, as appropriate;
- Provision of information regarding filing claims for unemployment compensation
- Assistance in establishing eligibility and determination for all programs and provide follow up services for individuals as applicable;
- Development of an Individual Employment Plan via EF System to identify the employment goals, appropriate achievement objectives, and appropriate combination of services;
- Short-term pre-vocational services, including development of learning skills, communication skills, interviewing skills, punctuality and professional conduct to prepare individuals for unsubsidized employment or training;
- Assistance with filing for financial aid;
- Work assignment where appropriate;
- Case management for those seeking training and for all TANF and Welfare-to-Work participants;
- Individual, group and career counseling;
- Referrals to One-Stop partner agencies for needed services as determined by assessment;
- Comprehensive and specialized assessment of the skill levels and service needs which may include but is not limited to diagnostic testing, use of appropriate assessment tools and in-depth interviewing.

Programs included in the local workforce development system:

### **Wagner-Peyser**

Wagner-Peyser is a labor exchange program that brings together individuals who are seeking employment and employers who are seeking employees. The State shall administer a labor exchange that has the capacity to assist job seekers to find employment; to assist employers in filling jobs; to facilitate the match between job seekers and employers; to participate in a system for clearing labor between the

States, including the use of standardized classification systems issued by the Secretary of Labor under Section 15 of the Act; and to meet the work test requirement of the State Unemployment Compensation system.

Self-services are available to all job seekers and employers. Services may be accessed from computer workstations at One-Stop career centers and personal desktop computers through the Internet. In addition to accessing information electronically, customers can choose to receive information in more traditional forms such as printed material which will be available at One-Stop career centers.

### **Workforce Innovation and Opportunity Act (WIOA)**

The WIOA program provides Individualized Services intended to help job seekers return to the workforce by utilizing general, individual, and, if determined eligible, training services. WIOA provides for one-on-one assistance with resumes, interviewing, job search, and career planning. Workers who are either unemployed or working in low-wage jobs may be eligible for supportive services while seeking employment, interviewing or attending training. The primary focus of training is to obtain a certificate or degree of value to the labor market, leading to a job in high demand occupations and emerging industries. As funding allows, participants may be eligible to receive tuition assistance which may include instructional costs, books, materials, and fees (such as application costs, registration, and laboratory fees).

Target population for WIOA services consist of workers who have lost their jobs through no fault of their own (dislocated workers); Homemakers who have lost their financial support from a family member; recipients of public assistance and other low-income individuals when funds are limited; employed workers that need skills upgrading or retraining.

#### **WIOA Youth:**

The Youth program is designed to guide eligible young adults, through high-quality case management, toward educational attainment which includes career guidance and exploration. Youth services allows for the provision of summer and/or year-

round work experience opportunities such as internships and pre-apprenticeships, and skills training along a career pathway for in-demand industries and occupations, including supportive services. The ultimate goal for program participants is either advancement into post-secondary education or the attainment of employment with a family-sustaining or self-sustaining wage. Youth program services are prioritized for out-of-school youth (OSY) and youth with significant barriers, including disabilities, pregnant or parenting, or those subjected to the juvenile/adult justice system.

The CareerSource Polk Young Leaders Program connects youth ages 16 to 24 with employment and career development. Youth programs include activities that promote youth development and citizenship and target opportunities for youth living in high poverty areas.

We provide academic support and career coaching to youth ages 16 to 24 who reside in Polk County. The program is free to those who qualify and assists youth in gaining academic and employability skills needed to become successful as they transition into adulthood. Youth aged 18 to 24 may receive scholarships for specialized training in selected fields, based on aptitude and interests. Once they have completed these skill-building activities, staff will work one-on-one with students to assist in marketing their skills to the employer community. Youth also have the opportunity to earn cash incentives once they have achieved program milestones. Participating youth take part in activities throughout the county including:

- Company & College Tours
- Career Exploration
- Goal Based Financial Incentives
- Tutoring & GED Prep
- Community Service
- Interview Skills & Job Search
- Work Experience
- Career Fair

- Recruitment Events
- Job Shadowing

### **Welfare Transition/TANF**

The Welfare Transition Program (WTP) provides emphasis on work, self-sufficiency, and personal responsibility; as well as opportunities for welfare recipients to move from welfare to work. The support structure includes the programs and services such as: employment programs, job training, child care and transportation assistance; diversion programs to reduce domestic violence and child abuse; diversions to prevent families from going on welfare and relocation assistance.

### **Supplemental Nutrition Assistance Program (SNAP)**

The Supplemental Nutrition Assistance Program emphasizes work, self-sufficiency, and personal responsibility. Program participants gain valuable skills, training, and work experience in an effort to reach total self-sufficiency.

The purpose of the program is to help families in need while transitioning individuals to self-sufficiency. Effective January 1, 2016, able bodied adults without dependents (ABAWDs) must be engaged in work-related activities in order to receive SNAP benefits. ABAWDs can meet work requirements in a variety of ways, including: working 20 hours or more on average per week; participating in job search in combination with other allowable activities, occupational skills training, on-the-job training, adult education and literacy, vocational or technical training, or other educational programs; participating in work experience programs at public and private sector employers, or volunteering.

### **Reemployment Services and Eligibility Assessment (RESEA)**

The program provides re-employment services to pre-selected UC claimants that are most likely to exhaust their unemployment benefits. The services provided include, but are not limited to:

- Orientation and Assessment
- Labor market information unique to area of work experience
- Developing an employability development plan

- Job and additional services referrals
- Follow-up to further assist in their employment efforts

**Migrant Seasonal Farmworker (MSFW):**

CareerSource Polk has one MSFW Outreach Specialist assigned to cover the Polk County area. CareerSource Polk is committed to serving farmworkers who work in the Polk County service area. The MSFW Outreach Specialist assigned to our Region is bi-lingual and is accustomed to serving the farmworker population and employers located within Polk County. Our MSFW Outreach Specialist works jointly with the agricultural employers and directly with the farmworkers to deliver available employment services and knowledge of services available in our One-Stop Center and other agencies available to the farmworkers to promote quality of the labor exchange and quality of life for farmworkers in our service area.

The MSFW Outreach Specialist travels extensively within the region of Polk County and uses a network of community contacts and knowledge of the local agricultural employer seasonal cycles of activity to reach the goal of 7 quality contacts per day where contacts are documented his contact with each MSFW and reportable services are provided.

The MSFW Outreach Specialist is visible in the farmworker communities within our county and assists in establishing strong working relationships with the farmworkers and employers to enhance the overall services available to migrant seasonal farmworkers in Polk County.

The agriculture in the region includes citrus, blueberries, watermelons, strawberries and peaches with the main growing/harvest cycle being November through June of the year.

The MSFW Outreach Specialist in conjunction with other One-Stop career center staff works to ensure that Migrant Seasonal Farmworkers in our county are aware of opportunities in employment, including both agricultural and non-agricultural jobs.

CareerSource Polk is in partnership with the Farmworkers Jobs and Education Program located in Auburndale, Florida who provides GED classes, TABE testing, ESOL classes and other services to migrant farmworkers.

The main area of needs of the farmworkers in our region range from assistance in paying utility bills, rental/housing assistance, food assistance, education on the farm labor program, supportive healthcare services, child care services, services at the One-Stop, and information on other education services available in the State of Florida.

**Trade Adjustment Assistance:**

DEO Merit Staff maintain familiarity with TAA requirements, screening and determination applicability. As part of the TAA Information Meeting, and in any subsequent contact, the local TAA Coordinator will emphasize the importance of receiving an assessment prior to their enrollment in training deadline. Any affected workers requesting TAA assistance that may be coming from outside the region are referred to the local designated TAA staff.

CareerSource Polk distributes information about TAA services and the certification process in the career centers and through the Business Services Division. A local designated merit staff serves as the initial point of contact for receipt of a TAA Certification. The designated staff makes initial contact with the employer to request an impacted worker list and advise them of the TAA Services. If the employer is not willing to provide a list of the impacted workers, the designated staff member works with the TAA State Coordinator to obtain a list of employees who are listed on the tax rolls during TAA Certification period. Upon obtaining the list of impacted workers the designated staff sends a TAA Certification Notification to all the impacted workers. The notification includes information about the services, next steps and deadlines related to the TAA benefits. TAA customers are invited to attend a group or one on one orientation sessions including information about:

- determination of eligibility for TAA services;

- unemployment compensation claims filing assistance;
- Information sessions for affected workers about the One-Stop's full array of services, employability skills, job seeking assistance, and resume preparation;
- Assessment of the needs of the affected workers through surveying and interviewing;
- Training, Job Search Allowances, Relocation Assistance, Trade Readjustment Allowances (TRA) payments;
- Documentation and benefit deadlines;
- Follow-up and follow-along with affected workers to ensure they are receiving services needed to become re-employed.

One-Stop partners are afforded the opportunity to participate in TAA Orientation sessions.

### **Veterans Program:**

Veterans and their eligible spouses have priority of service in the Resource Room and for all programs operated by the Region and are seen immediately. Veterans are offered the full range of One-Stop services to include job counseling, job search/referral, resume services, as well as specialized assistance on Veterans rights and benefits as well as assistance and interface with the Veterans Administration (VA) programs.

The Veterans program falls under the supervision of CareerSource Polk as the One-Stop Operator and the DEO OMC II.

Upon their initial entry into the One-Stop career center, veterans and eligible persons with significant barriers to employment will be identified using the needs-based approach and then directed to the Disable Veteran Outreach Program (DVOP) staff for assessment and intensive case management services. One-Stop partners and service providers are trained to identify veterans and covered persons with barriers to employment and, in most instances, immediately refer these veterans to the DVOP staff for services.

DVOP staff will provide a wide range of workforce services to veterans and eligible persons with their primary focus being on identifying veterans with significant barriers to employment requiring intensive services. DVOP staff will facilitate services through the case management approach to veterans and eligible persons with barriers to employment and with special workforce needs. These services include but are not limited to the following:

- Assessment, including a documented plan of service (Individual Employment Plan) ;
- Counseling and career/vocational guidance;
- Referral of veterans to supportive or remedial services;
- Referral of veterans to job focused and outcome-driven training, certification, etc.
- Job development services;
- Development of VA funded Special Employer Incentive and On-the-Job training slots for Vocational Rehabilitation and Employment (VR&E) participants;
- Refer veterans to employment opportunities found in EF;
- Maintenance of an up-to-date Network Guide for veteran customers and One-Stop associates;
- Conduct outreach to locate veterans for intensive services and market services for veterans in Vocational Rehabilitation and Employment (VR&E), Homeless Veteran Rehabilitation Program (HRVP), Veteran Workforce Investment Program (VWIP), Workforce Innovation and Opportunity Act (WIOA), etc.; and
- Participate in Transition Assistance Program (TAP) activities for transitioning service members and their spouses.

**(2) Subgrants and contracts:** Describe the competitive process used to award subgrants and contracts in the local area for WIOA-funded activities (WIOA §108(b)(16)).

CareerSource Polk (CSP) competitive procurement process used to award subgrants and contracts is described below:

The extent of competition will be consistent with the dollar amount but, in general, procurements will be conducted in an open manner, available to the public for response and all procurement decisions will be documented.

- a. Competitive procurement process must be used for purchases of \$250,000.01 and above. Each process shall be publicly advertised and a formal request for bids, proposals, or quotes shall be issued. Where the services are for the purpose of implementing grant activities, and not for the day to day operations of the agency except as provided herein for On-the-Job Training, GED Training and Employed/Incumbent Worker Training, the decision to let an RFP or a bid shall be made by the governing board, which is, the Polk County Workforce Development Board, Inc., for their approval.
  - i. CareerSource Polk will maintain a list of previous and prospective proposers who have asked to be included on the proposer/bid list for various types of goods and services. CareerSource Polk will ensure all prequalified lists of persons, firms, or products which are used are current and potential bidders will not be precluded from qualifying during the solicitation period. When CareerSource Polk issues a formal solicitation, these proposers will, if practicable, be notified that CareerSource Polk is seeking goods or services.
  - ii. Legal notices will be posted on the Board's website and shall appear in at least one newspaper, of general circulation for three (3) consecutive days whenever a formal bid/proposal is let. Potential bidders will be given at least ten (10) working days to respond to the advertisement if time permits.
  - iii. Solicitations will provide for all of the following:
    - aa. Clear and accurate descriptions of the services being procured. The description must not contain features that restrict competition.

- bb. All requirements that must be fulfilled and all other factors used in evaluation of bids or proposals.
  - cc. Technical requirements described in terms of functions to be performed or performance required, including a range of acceptable or minimum acceptable standards.
  - dd. Specific features of--brand name or equal descriptions, if included in the solicitation.
  - ee. If procuring goods or certain types of services, the acceptability of metric measurements.
  - ff. Preference for ecologically sound and energy-efficient products.
- iv. The Board will accept proposals based upon the terms and conditions of the RFP.
  - v. Proposals / bids submitted are received by the Board staff and stamped with date and time of receipt.
  - vi. Proposal/bid evaluation criteria are published with the RFP or bid. The rating criteria include but are not limited to the following elements:
    - aa. Proposer's financial capability. Proposer's books and records are kept in accordance with generally accepted accounting principles.
    - bb. Reasonableness of the cost.
    - cc. Proposer's ability to meet performance goals.
    - dd. Proposer's record of past performance in the delivery of services.
    - ee. Proposer's experience.
  - vii. The Board may conduct pre-award surveys where indicated.
  - viii. RFPs and bids shall be reviewed by staff for responsiveness. Non responsive proposers are notified in accordance with the RFP or bid.

- ix. The President/CEO shall assemble review committees to rate and rank proposals and bids. Generally review committees consist of board members and/or staff members who volunteer to serve in that capacity. They may on occasion consist of members of the community with a special applicable expertise.
- x. Proposals to serve Youth must be presented to the Youth Development Council which shall make recommendations as to funding in some cases to the Board of Directors.
- xi. Other proposals/bids for program services must generally be presented to the appropriate Committee/Council who provides oversight for that good or service. The committee then makes recommendations for funding and in some cases selection to the Board's Executive Committee for selection and approval.
- xii. Recommendations from the Board's committees are submitted for consideration to the Full Board of Directors which makes the final selection and approval determinations.
- xiii. All procurement contracts and other transactions between local workforce boards and units of state or local governments using WIOA funds must be conducted only on a cost reimbursement basis. No provision for profit is allowed.
- xiv. Any excess of revenue over costs incurred for services provided by a governmental or non-profit entity must be included in program income.
- xv. The type of agreement entered into by the local workforce board may be fixed price or cost reimbursement, depending on the method of procurement and services being procured. The "cost-plus-a-percentage-of-cost" or "percentage of construction cost" methods of contracting shall not be used.

- xvi. CareerSource Polk will negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. Costs or prices based on estimated costs for contracts are negotiated using the Federal cost principles.
- xvii. When possible, CareerSource Polk may enter into state and local intergovernmental agreements where appropriate for procurement or use of common or shared goods and services and may use Federal excess and surplus property in lieu of purchasing new equipment and property.
- xviii. For fixed amount sub-awards prior approval from DEO will be obtained. Payments will be based on meeting specific requirements of the Federal award and accountability is based on performance and results. The award amount will be negotiated using the cost principles as the guide. CareerSource Polk will use cost, historical cost, or unit pricing data to establish the fixed amount award with assurance the sub-recipient will realize no increment above actual cost. If the award is terminated before the completion of the project, the award amount will be adjusted. The sub-recipient will certify in writing to CareerSource Polk at the end of the award that the project or activity was completed or the level of effort was expended. Prior written approval is required by the sub-recipient for changes in project leader or scope of effort.
- xix. Positive efforts shall be made by recipients to utilize small businesses, minority-owned firms, labor surplus area firms and women's business enterprises, whenever possible. Recipients of Federal awards shall take all of the steps outlined in xvii to further this goal.
- xx. Contracts shall be made only with responsible contractors who possess the potential ability to perform successfully under the terms and conditions of the proposed procurement. Consideration shall be given to such matters as contractor integrity, record of past performance, financial and technical

resources or accessibility to other necessary resources. In certain circumstances, contracts with certain parties are restricted by agencies' implementation of E.O.s 12549 and 12689, "Debarment and Suspension."

xxi. Awards will not be made to a debarred or suspended party. This is required to be verified for all sub-recipient contracts and for vendor contracts greater than or equal to \$25,000, or procurements of Federally-required audit services in any amount.

**(3) Expanding Access to Employment:** Describe how the local board, working with entities carrying out core programs, expanded access to employment, training, education and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. This includes how the local board facilitates developing career pathways and co-enrollment, as appropriate, in core programs, and improves access to activities leading to recognized postsecondary credentials (including portable and stackable industry-recognized certificates or certifications) (WIOA §108(b)(3)).

CareerSource Polk will seek to strengthen the role of sectoral and industry partnerships as coordinating entities on the full range of workforce issues. Industry partnerships can also address common workforce challenges related to entry-level workers, the recruitment of low-income and other targeted groups, and even, on occasion, the reemployment of dislocated workers. Apprenticeship programs are often thought of primarily as training new workers. However, they also serve a wide range of coordinating functions for their employers: incumbent worker training, supervisory training, sophisticated safety training and, in some cases, pre-apprenticeship programs for in-school and out-of-school youth, sometimes with community based partners.

CareerSource Polk's President & CEO has a long history of civic engagement in which she learned the importance of building partnerships and leveraging resources to get a project completed or the job done right. We will pursue partnerships from

nonprofit foundations, businesses from the private-for-profit sector, etc. to make tax dollars stretch further.

- (4) Key Industry Sectors:** Identify how the LWDB aligns resources that support and meet training and employment needs of key industry sectors in the local area. Describe strategic or other policies that align training initiatives and Individual Training Accounts (ITAs) to sector strategies and demand occupations (WIOA §134(c)(1)(A)(v)).

CareerSource Polk encourages and promotes high skill/high wages through the Individual Training Account System.

The LWDB continually aligns its business programs to ensure that our business' needs are being met, among the many resources used is the Regional Demand Occupations List identifying occupations in the local area. Employers, local economic development and educational partners, and other industry representatives have the opportunity to review, comment and make recommendations for changes to the Regional Targeted Occupation List (RTOL). Other resources that may be used include the Florida Occupational Supply Demand System, and direct feedback obtained from employers, either individually or through industry associations. Policies adopted for aligning training initiatives and ITAs include:

PY11-01 Mod. 2 On-the-Job Training: indicates that the preference that OJTs are for in demand occupations.

PY13-02 Regional Target Occupations List Mod 1: Lists the occupations for which WIOA funded ITAs may be generated.

PY07-03 Selection and Retention of Training Providers Mod 7: Establishes procedures for the selection and retention of training providers.

Through the use of the Regional Targeted Occupations List (RTOL), employers, local economic development and educational partners, and other industry

representatives have the opportunity to review, comment and make recommendations for changes to address labor market needs of the local business community, including local and state economic development priorities and linkage to local job opportunities. Training is then encouraged based on those needs, with emphasis on jobs that are both high demand and high skill/high wage.

With this new approach we are able to analyze occupations and critical skill sets needed within the Area, identifying occupations that provide the best opportunities for investment to build different types of skills, identify gaps and build career ladders in high growth areas. This model also allows for the determination of variances and inconsistencies, occupations that are in decline and/or have an oversupply of trained workers which are first to be recommended for elimination or not to offer training for those occupations.

- (5) Industry Partnerships:** Describe how the LWDB identifies and collaborates with existing key industry partners in the local area. Describe how the LWDB coordinates and invests in partnership infrastructure where key industry partnerships are not yet developed (WIOA §134(c)(1)(A)(iv)). The local area must describe how the following elements are incorporated into its local strategy and operational sector strategy policy:

CareerSource Polk identifies key industry partnership opportunities through inquiries and feedback from professional organizations, such as the Society for Human Resources Management, and serves on several local Boards charged with policy development for workforce and education programs.

The key industry sectors our local area has identified include Healthcare, Manufacturing, Agriculture/Forestry/Fishing and Hunting, Transportation and Warehousing, Professional, Scientific, and Technical Services. To ensure that education and training opportunities stay aligned with the needs of the labor market, CSP uses a similar framework for identifying in-demand occupations. We are currently working with our state college and manufacturing businesses to identify

training candidates, provide training and placement of the participants into manufacturing jobs. CSP has excellent relationships with business partners across a number of industry sectors.

The President & CEO and her designees engage with nearly all of the economic development organizations throughout the county (i.e. Central Florida Development Council, the Lakeland Economic Development Council, local Chambers of Commerce, etc.) enabling CareerSource Polk to strategically assist with business development and retention efforts.

A. Describe how selected industries or sectors are selected based on, and driven by, high quality data (cite data source used).

CSP regularly reviews and analyzes high quality, labor market information by industry and occupation to sector strategy efforts. Specific data sources include:

- Employment projections Data (both by industry and occupation) produced by the Florida Department of Economic Opportunity, Labor Market Statistics.
- Occupational Employment Statistics and Wages (OES) program. Information is a result of an occupational employment and wage survey conducted by Labor Market Information, in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.
- Employ Florida and Help Wanted Online reports to determine real time labor demand through online ads and job postings.
- Direct feedback from employers collected through surveys, roundtables, community meetings and professional trade groups.

B. Describe how sector strategies are founded on a shared/regional vision.

CSP leadership maintains close relationship with nearly all of the economic development organizations throughout the county (i.e. Central Florida Development Council, the Lakeland Economic Development Council, local Chambers of Commerce, etc.) enabling CareerSource Polk to strategically assist

with business development and retention efforts. These relationships have guided the development of the area's sector strategies. All partners agreed and supported the target sectors in alignment with Enterprise Florida's identified sectors.

C. Describe how the local area ensures the sector strategies are driven by industry: CSP ensures that sector strategies are driven by industry by inclusion; they are part of the process. Representatives from targeted industries serve/participate in different regional economic development organizations. The Business Services team continuously provides feedback from employers in targeted industry sectors.

D. Describe how the local area ensures that sector strategies lead to strategic alignment of service delivery systems.

CSP's Management Team has great partnerships with economic development organizations throughout the county, institutions of higher learning, and other community organizations. CSP also meets with these partners to ensure alignment of service delivery systems.

E. Describe how the local area transforms services delivered to job seekers/workers and employers through sector strategies.

CSP recognizes the importance of good relationships with employers and strives to be flexible to meet their employment and training needs working closely with state and training partners to meet their needs. We continuously assist by conducting different assessments, pre-employment training and screening as per the employer's requirements for hiring as well as onsite recruitment events.

F. Describe how the local area measures, improves and sustains sector strategies.

The sector strategies initiative is still new in our county. Measurement is conducted based on employer satisfaction through Salesforce, job seeker placements and training completions.

**(6) In-demand training:** Describe how the local board ensures training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate (WIOA §134(c)(G)(iii)).

CareerSource Polk uses the Regional Targeted Occupations List (RTOL) as the catalyst for establishing approved occupational training programs in the County, emphasizing on “in demand” occupations. Every year all eligible training providers are required to submit a matrix to include a program they wish to offer during the program year. In order for training programs to be eligible for consideration, they must be contained in the RTOL for the current program year. Only programs that are linked to an in-demand industry sectors or occupations in the local area and/or leading to a certificate or an associate degree and in limited cases a baccalaureate degree or that provide the skills or competencies needed for an in-demand occupation are approved.

**(7) Employer Engagement:** Describe the strategies and services that will be used in the local area to:

A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs;

The Business Services Division utilizes the Regional Demand Occupations List, its relationships attained through business related organizations (Chambers of Commerce, Society for Human Resources Management, EDCs, etc.) and lists of employers as the basis for identifying and initiating contact with small and large employers throughout the region. The Business Services Division works directly with employers in identifying and addressing their employment and training needs. This is done through monthly newsletters, e-mail blasts, social media, online surveys, employer-site visits, job fairs, recruiting events, human resources roundtables and an Annual State of the Workforce Summit.

Customer Relationship Management is conducted through employflorida.com as well as Salesforce.com. Activities and case notes in EF provide required documentation of the services provided, while Salesforce.com interfaces with the employer registrations and provides an opportunity to improve feedback on the services provided through employer surveys.

- B. Support a local workforce development system that meets the needs of businesses in the local area;

Meeting the needs of businesses in the local area can be evaluated through the Salesforce-based Customer Satisfaction Surveys. Following some of the events and services, employers are provided with an electronic survey. Since employers can only complete one survey per quarter, they may also be provided with hard copy surveys at some of the events, such as job fairs, recruitment events, and the Workforce Summit.

Business Service Division staffs are members of local, regional or statewide business forums and attend meetings to stay abreast of current and emerging workforce needs. These include Chamber of Commerce, Mid-Florida Society for Human Resources Management, Economic Development Organizations, the Polk Manufacturer's Association, Career Academies, etc.

- C. Better coordinate workforce development programs and economic development;

The Business Services Division closely collaborates with the economic development organizations in the region including, the Central Florida Development Council, Lakeland Economic Development Council, Bartow Committee of 100, Winter Haven Economic Development Council and the various Chambers of Commerce in order to share information and collaborate to better serve the region's employers.

- D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs. WIOA §134(c)

CareerSource Polk provides staff with access to the various MIS systems to include: Employ Florida (EF), One Stop Service Tracking (OSST), CONNECT (Reemployment Assistance), The Work Number and SUNTAX which provides

workforce program data and wage records for customers under the TANF, SNAP, and RESEA programs.

- (8) Priority for Services:** Describe local policies and procedures to prioritize services for veterans, recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for individualized career and training services in the adult program..

Our local policy and procedures establish that in the event WIOA funds allocated are limited, career centers shall provide priority for career services and training services as detailed below: (If an individual does not meet the priority guidelines, the Case Manager will provide information on alternative funding).

- c. Recipients of public assistance;
- d. Other low-income individuals; and
- e. Individuals who are basic skills deficient.

The first priority of service will be for an adult who is at least one of the following:

- a. A veteran
- b. An individual who is receiving or, at any time in the prior six months, was eligible to receive food stamps.
- c. An individual who has received or is a member of a family which has received, a total family income (inclusive of unemployment compensation and child support payments) for the six month period prior to his/her application for services, which in relation to the family size when annualized, does not exceed the higher of the poverty line or 70% of the lower living standard income level as established by the Department of Health and Human Services.
- d. An individual who was a Job Corps participant at any time in the six month period prior to his/her application.
- e. An individual who is eligible to receive welfare transitional benefits.

The next highest priority for service will be for an adult with one or more of the following barriers to employment regardless of income:

- a. Homeless individual
- b. Offender
- c. Older Worker
- d. Physically or mentally disabled
- e. Single parent with one or more children under the age of 18 living in the applicant's household
- f. Substantial language or cultural barriers

The lowest priority of service will be for an adult who does not have any of the above characteristics.

- (9) Training Services:** Describe how training services are provided, including how contracts for training services are used, and how such contracts are coordinated with the use of ITAs (WIOA §134(c)(1)(A)(v)).

The CareerSource Polk Business Services Division provides employer services based on the needs of the employer.

Our Business Services Team is made up of three Business Service Consultants each covering a specific geographic area based on population density. The assigned areas include the Northeast quadrant of Polk County, the Lakeland area in the western quadrant and the entire southern area of the county. Our Business Service Consultants schedule visits to new and existing employers in order to educate them on the full range of services available to them including training grants.

The Business Services staff will assist the employer in identifying the appropriate grant for which to apply and assist the employer in the application process. Availability of training grants will be expanded in as much as the budget allows.

Customized Training, On-the-Job Training (OJT), and Employed Worker Training (EWT) are provided on a case-by-case basis as requested by employers. The Workforce Performance Council must approve all training grants valued over \$50,000.

Employed Worker Training opportunities will be offered to eligible WIOA participants and promoted to employers through the Business Services Division. Individuals selected for training opportunities may be full-time or part-time workers, or underemployed participants. Individual career plans are developed to guide the participant toward employment and career goals. CareerSource Polk routinely seeks other funding sources to assist employers in meeting the needs of the workforce including assisting them with CareerSource Florida grant applications.

For customized employed worker the individual must be at or below the wage of 200% of poverty for a family of three as shown by USDOL LLSIL and must be in need of training to avoid lay-off to upgrade his/her skill level to increase their wage within the company. The Case Manager will contact the potential employee and/or employer to arrange an eligibility intake and inform him/her of the necessary documentation he/she will need to provide. After the intake process is completed the Case Manager will notify the Business Services Division that the customer has been determined eligible and data entered into the MIS system.

The Board has no other providers of WIOA services beyond OJT and customized training.

**(10)Customer choice process:** Describe processes that the local board use to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided (WIOA §108(B)(19)).

Our policy emphasizes that all training services will be provided in a manner that maximizes customer choice. Eligible customers receiving an ITA will be provided with a link to an online list of all eligible training providers locally and in the State,

which may provide instruction in the occupational areas that he/she has chosen to pursue. The list will include the provider's name, information including cost, and other appropriate information for each program. After this process, the customer will select the training provider.

**(11) Individual training accounts:** Describe the process and criteria for issuing Individual Training Accounts (ITAs) (WIOA §108(b)(19)).

Authorized staff at the one-stop delivery system or youth programs to issue ITAs, must follow the criteria and process described below:

- Establish customer's ITA eligibility as indicated below. ITA recipients must be:
  - ✓ WIOA customers who are eligible to work in the United States;
  - ✓ WIOA Adult or WIOA Older Youth customers who are residents of Polk County;
  - ✓ TANF or SNAP service eligible customers served by Polk County;
  - ✓ Unable to find suitable employment with existing skills and/or academic credentials as evidenced through unsuccessful placement while actively participating in career services offered through CareerSource Polk centers service system. Suitable employment is defined as an occupation which pays at least the state's Lower Living Standard Income Level (LLSIL) per hour for Adults or 80% layoff wage replacement for Dislocated Workers;
  - ✓ Determined through assessment that training is appropriate for the recipient unless the recipient proves to have completed a higher education degree;
  - ✓ Select a training program that is linked to a demand occupation in the Regional Targeted Occupations List (RTOL) and make a commitment to seek employment in the field once trained;
  - ✓ Select a training provider from the approved CareerSource Polk Eligible Training Provider List (ETPL);
  - ✓ Provide evidence that they have the financial resources to cover all other living expenses while completing the training period

- For training education that are Pell eligible programs:
  - ✓ Agree to apply for and bring proof of Pell grant application eligibility determination to the case manager as soon as possible; but not later than the beginning of the next term.
  - ✓ If ITA approved, the customer must acknowledge and agree to the use of Pell Grant funds to pay for other training related costs not covered through the ITA, such as rent, utilities, fuel, etc.
  - ✓ If Pell ineligible, the customer must provide proof of ineligibility to the case manager prior to being considered for ITA for the next term.

**Note:** If the customer is a late enrollee and Pell is not possible for the first term, the ITA will pay during that period while Pell is pending. The customer must still apply for and bring to the career center staff the proof of Pell application eligibility as soon as possible but not later than the beginning of the next term.

A. Describe any ITA limitations established by the board.

- The maximum CareerSource Polk approved cost for an ITA (CAP) is \$7,500.
- All ITAs will be categorized using a fair market value based on potential earnings upon entering employment. Training programs with the potential of higher earnings will have a larger amount of allowable investment than those earning less. The thresholds for allowable investment will be as follows:

Tiers	Average Entry Wage	Maximum Investment
Entry Tier	\$8.78 or less	\$5,000
Bridge Tier	\$8.79 - \$14.49	\$6,000
High Wage Tier	\$14.50 and up	\$7,500

B. Describe any exceptions to the use of ITA.

The customer is expected to complete training within the amount of funding approved at the beginning of training; however, CareerSource Polk recognizes

that this may not always be possible due to acts of nature, i.e., hurricanes, or uncontrollable circumstances, i.e., major illness of self or immediate family, suffered loss due to fire, death of immediate family. In extraordinary circumstances, the customer prepares a written justification fully detailing the circumstances that made it impossible to complete training under the initial approved funding and submits for LWDA's CEO review and/or approval through the appropriate line of communication.

**(12) Microenterprise and Entrepreneurial Training:** Describe mechanisms currently in place or in consideration that provide microenterprise and entrepreneurial training. Describe mechanism in place that support programs and co-enrollment, where appropriate, in core programs as described in WIOA section 134(a)(3)(A)(i) (WIOA §108(b)(5)).

Entrepreneurial training is provided through the career centers. In addition, the Business Services Division has a working relationship with the local staff of the US Small Business Development Center (SBDC). Job seekers and employers are referred to the SBDC for assistance in establishing new businesses, or expanding existing businesses. Upon request, the SBDC also provides staff to facilitate training sessions which may provide continuing educational credits through the Human Resources Certification Institute.

**(13) Enhancing Apprenticeships:** Describe how the LWDB enhances the use of apprenticeships to support the local economy. Describe how the LWDB works with industry representatives and local businesses to develop registered apprenticeships, in collaboration with apprenticeship training representatives from the Florida Department of Economic Opportunity and other partners, including educational partners. Describe how job seekers are made aware of apprenticeship opportunities.

CSP encourages career seekers to utilize apprenticeship programs as a career pathway to high demand, high wage occupations that are needed in the LWDA. CSP has identified the critical need for skilled labor in the areas of manufacturing

and recognizes that apprenticeship programs are a key job-driven strategy for employers and industries.

CSP makes job seekers aware of apprenticeship opportunities through orientations, outreach/community events, flyers, presentations and partnership meetings.

CareerSource Polk is constantly working with the educational partners to ensure apprenticeship programs are included as part of our extensive offering of training programs. Apprenticeship programs are included on our Eligible Training Providers List (ETPL), which is available to all customers emphasizing customer choice. The list is available on our website, and a copy is also offered to the customers when working with the case managers in the ITA process.

CSP is working with industry representatives and local businesses to develop registered apprenticeships in collaboration with apprenticeship training representatives from DEO and other partners, including educational partners.

**(14) Other Program Initiatives:** Describe services provided that include implementing initiatives such as incumbent worker training programs, on-the-job training programs, customized training programs, work-based training, industry and sector strategies career pathway initiatives, utilization of effective business intermediaries, and other initiatives supporting the board's vision and strategic goals described in Section III. WIOA §134(c)

In support of the board's vision and strategic goals, the Business Services Division of CareerSource Polk carries out the initiatives to address employer's engagement. The Business Services Division coordinates monthly roundtables and community forums as well as our annual Workforce Summit and CareerSource Polk's Annual Meeting in which employer's participation is outstanding. They also readily participate in hosting many of our summer youth participants and provide work and

mentoring opportunities to ensure proper guidance is being provided to their future workforce.

Our Business Services Consultants conduct daily visits to businesses within their territory in an effort to inform them of workforce programs such as job postings, recruitment events and job fairs, workforce training grants and other workforce services.

Other program initiatives include:

- Referral to state funded Incumbent Worker Training program
- Funding of Employed Worker and On-the-Job Training grants
- Monthly roundtables and a Workforce Summit scheduled annually, all of which provide CEU credits towards Human Resources Certification Institute certifications
- Best Places to Work Awards presented at the CareerSource Polk Annual Meeting
- Opportunity to be a worksite for our Youth work experience programs.
- Recruitment events at the career centers, employers sites or other locations
- Labor Market Information
- Assistance during transitions, such as layoffs or mass hiring
- Pre-employment testing and employee skills assessment
- Employee bonding

**(15) Service Provider Continuous Improvement:** Describe the local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, so meet the needs of local employers, workers and jobseekers. WIOA §108(b)(6)(A).

In an effort to ensure the continuous improvement of contracted service providers and other eligible providers of services, we will continue to monitor and assess the services provided to determine areas of opportunity to improve our service delivery. With the implementation of WIOA, it presents a great opportunity to review the

services, programs, and policies and procedures to align resources, correct deficiencies and ensure compliance with the new law.

We continue to enhance system-wide accountability and continuous improvement for the workforce system in general, including training providers. Several methods are currently being implemented at the state level to monitor and assess performance on a quarterly and annual basis through the core partners' submission of data to Florida Education and Training Placement Information Program (FETPIP) for data validation and compliance with WIOA requirements and subsequent reporting to USDOL and USDOE.

The state and local boards' Eligible Training Providers List" and the related eligibility procedures ensure the accountability, quality and labor-market-relevance of the training services programs that receive funds through WIOA Title I-B. Training providers will be subject to the initial eligibility pursuant to WIOA, which grants eligibility for only one full fiscal year, after which they make seek continued eligibility, based on performance and compliance with other requirements as established by the local board.

To ensure the continuous improvement of the services provided by CareerSource Polk who is responsible for providing direct oversight and technical support for the execution of workforce programs. CareerSource Polk's as the One-Stop Operator monitors performance through the appropriate MIS systems (i.e. EF, OSST) as well as monthly meetings with the career center management. Quarterly performance meeting are conducted with the Project Manager and Career Center management to discuss successes, concerns and questions that have surfaced during the quarter.

The CareerSource Polk Board is also structured to provide oversight of program activities. The top management of each Department (One-Stop Career Center, Youth Services, and Business Services) is required to attend the appropriate Board Council/Committee and report on performance over the quarter. The Youth Development Council receives and reviews the quarterly performance report of the

Youth Leaders program. The Workforce Performance Council receives and reviews the quarterly performance report of the One-Stop Operator and reviews the quarterly performance report of the Business Services.

CareerSource Polk contracts with a third party qualified firm that provides programmatic and fiscal monitoring of workforce programs. The contracted monitors conduct monitoring visits at least 4 times during the fiscal year. Monitoring reports, along with the Corrective Action Plans are provided to the Board, through the appropriate Council for full review and comment. The Councils review the reports and address concerns to the Board staff and Service Provider staff on a quarterly basis.

The continuous improvement of the eligible training providers must include:

- Information specifying the levels of performance achieved with respect to the number of individuals engaging in the program of study. The total number of individuals exiting from the program of study
- The total number of participants who received training services through each of the adult programs and the dislocated worker program
- Average cost per participant for the participants who received training services
- The number of individuals with barriers to employment served by each of the adult programs and dislocated workers

**(16) Youth Program Design:** Describe the design framework for local youth programs and how the 14 program elements required in §681.460 of the WIOA regulations are made available within that framework (WIOA §129(c)(1) ).

CareerSource Polk's Young Leaders Program design is structured to ensure effective service delivery to maximize the level and participation of as many eligible young adults as possible, with a primary focus on service delivery strategies that increase participation of out-of-school as well as those young adults who are most at

risk of not acquiring the necessary skills and abilities to attain meaningful employment.

The success of a solid youth program that fulfills the intent of WIOA largely depends on the compliance of program requirements which include:

- ✓ the expenditure of a minimum of 75 percent of funding on services to out-of-school youth;
- ✓ the expenditure of 20 percent of funding on the provision of work experiences for youth, including those with significant barriers to employment;
- ✓ the development of strong career pathways for youth;
- ✓ the co-enrollment of eligible youth into appropriate partner programs and activities, including TANF;
- ✓ the provision of the 14 required youth program design elements;
- ✓ the provider's past record of success with the retention of youth participants in education, training activities, or unsubsidized employment during the second and fourth quarters after program exit; and
- ✓ a detailed description of the local board's negotiated performance goals with the commonwealth for which the provider has a role in meeting and/or exceeding

The Young Leaders program is designed to guide eligible young adults, through high-quality case management, toward educational attainment which includes career guidance and exploration. The services of the Young Leaders program allows for the provision of summer and/or year-round work experience opportunities such as internships and pre-apprenticeships, and skills training along a career pathway for in-demand industries and occupations, including supportive services. The ultimate goal for the participating young adults is either advancement into post-secondary education or the attainment of employment with a family-sustaining or self-sustaining wage. The Young Leaders program services are prioritized for out-of-school youth (OSY) and young adults with significant barriers, including disabilities, pregnant or parenting, or those subjected to the juvenile/adult justice system.

At the beginning of program year 2013-2014, the Local Workforce Development Board was authorized by DEO to provide direct services to the young adults in Polk County. The framework of our Young Leaders program is in compliance with the 14 program elements required on §681.460 of the proposed WIOA regulations.

The funds allocated to our local area are allocated to serve eligible in-school and out-of-school youth. Now that we have completely transitioned to WIOA, our primary goal is to serve out-of-school youth. Understanding that the work experience is a critical WIOA youth program element, the Local Area has placed significant emphasis in providing work experience for OSY, in addition to the Summer Youth Employment Program.

In-house services provided through state waiver include:

- Recruitment and Outreach. Conduct activities, including outreach to local government facilities, non-profit and faith-based organizations that provide support services to disconnected youth and young adults; including the use of word-of-mouth referrals, and social media platforms. Other suggested recruitment strategies may include: Visiting low-income communities and neighborhoods, knocking on doors, and speaking to friends, families, and young adults about available services and opportunities.
- Designing a program application process that is easy to complete by removing as many of the administrative hurdles as possible.
- Creating an online youth friendly orientation that is accessible through CareerSource Polk website.

Objective assessment of academic level, skills level, and service needs of each participant would include:

- Test of Adult Basic Education – is designed to effectively assess both the knowledge and skills of the young adult.

- CareerScope – is a web-based career assessment reporting system which measures both aptitude and career interest to help young adults begin the career or educational planning process.

Development of an individual service strategy for each young adult includes:

- Customized career pathway plan
- Addressing barriers
- Setting goals and activities
- Documenting achievements / credentials
- Notating academic progress
- Identifying supportive service needs

Engagement: Many disconnected young adults face challenges and life obstacles that result in the cycling in and out of program services. Such challenges may include: periods of homelessness, issues with the criminal justice system, pressures to provide for their families, and substance abuse, among others.

- Recognizing the unique hardships of each individual and working to establish trust between participants and staff, we must create an atmosphere where participants feel staff is invested in their success.
- Once a participant is enrolled staff must communicate regularly and effectively. Explain the program's available services and activities, the expectations of the participant, and any available support services that may be necessary.
- Set achievable goals with the participant early in the process and communicate the status of progress towards meeting those goals often.
- Placing young adults in cohorts allows individuals to move through the program and receive services with others. Participants often become friends

and gain a sense of togetherness and accountability within the cohort. Such engagement may also open the door for young adults to take a leadership role, such as tutoring other participants, giving presentations, etc.

- Ensure that supportive services are made available to participants to help remove barriers that would prevent them from continuing with the program.
- If a young adult leaves the program, the Career Development Specialist will remain in contact with that individual and encourage re-engagement through phone calls, texts, social media, or in-person visits at their ‘hangouts’ or homes.

Participants will have an opportunity to take advantage of work experience or community service activities which will encourage the following:

- practical experience
- workplace skills
- increase self confidence
- increase understanding of the work involved in a particular field
- develop a greater understanding of work life issues.

CareerSource Polk’s Youth program ensures compliance with the 14 program elements through partnerships with qualified organizations and agencies whose missions align with our own. The table below outlines each program element and how our program is structured to ensure the provision of services are acquired to deliver each element successfully and efficiently:

Program Element	CareerSource Polk	Services Outsourced (MOUs)
1. Tutoring, study skills training, and instruction leading to completion of secondary school, including dropout prevention strategies.		East Area Adult School West Area Adult School Ridge Technical College Traviss Technical College Fresh Start Community Schools

		Polk County Public Schools
2. Alternative secondary school services, as appropriate		Ridge Technical College Traviss Technical College Fresh Start Community Schools
3. Paid and unpaid work experiences directly linked to academic and occupational learning	Summer Youth Employment Program  Youth Employment Program	
4. Occupational skills training, leading to recognized post-secondary credentials aligned with in-demand industry sectors		Ridge Technical College Traviss Technical College Board-Approved Eligible Training Providers (through Individual Training Accounts (ITAs))
5. Education offered concurrently with workforce preparation activities and training for a specific occupation or occupational cluster		Opportunities to earn a credential are encouraged. On-the-Job Training (OJT) Paid Work Experience
6. Leadership development opportunities, which may include community service and peer centered activities encouraging responsibility and other positive social behaviors during non-school hours, as appropriate.		Talbot House Planned Parenthood Peace River Center The Dream Center Healthy Start Coalition Lighthouse Ministries
7. Supportive services	Polk County Transit (bus passes)	
8. Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months		Boys & Girls Club Risk Club Lakeland Police Athletic League (PAL) Made Mentors
9. Follow up services for not less than 12 months after the completion of participation, as appropriate	CareerSource Polk's Career Development Specialist	

10. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate.	CareerSource Polk's Career Development Specialist	Teen Pregnancy Prevention Alliance Healthy Start Coalition Peace River Center Florida Department of Health in Polk County (tobacco free initiative) Homeless Youth Task Force Devereux
11. Financial Literacy education		Wells Fargo Fifth Third Bank Mulberry Community Service Center
12. Entrepreneurial skills training		Polk State College and Tampa Area Electrical JATC
13. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area (career awareness, career counseling, career exploration)	CareerSource Polk's Career Development Specialist and Wagner-Peyser Staff	
14. Activities that help youth prepare for and transition to postsecondary education and training.	CareerSource Polk's Career Development Specialist	

A. **Define the term “a youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society.”** Describe how the local board defines whether a youth is unable to demonstrate these skills well enough to function on the job, in their family, or in society and what assessment instruments are used to make this determination (20 C.F.R. §681.290 ).

CSP’s WIOA Youth Program defines “A youth who is unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the

job, in the individual's family or in society" by having TABE test scores below or at an 8.0 for either reading or total math.

As part of the program eligibility, students are assessed through TABE tests to determine level of knowledge and comprehension of the English language. Through this assessment, a student is considered basic skills deficient if he/she scores at or below the 8<sup>th</sup> grade level on the math, reading and language arts.

Nearly one-fifth of Polk County's population speaks a language other than English in the home. To assist individuals with limited English proficiency, bilingual staff is available, partnerships are developed with organizations which provide multi-lingual services and staff receives training in cultural awareness. Program materials printed in multiple languages are also available for distribution.

The region partners with organizations such as Heart to Heart Community Enrichment (Creole) and Farmworkers Program (Spanish) that have staff that can assist in translating or providing services. Also the region is currently translating program FACT sheets in Spanish and Creole.

The region will also take into consideration the recommendation to seek for an interpreter to provide services to customers that speaks a language other than Spanish or Creole.

**B. Define "requires additional assistance."** Describe how the local board defines the term "requires additional assistance" used in determining eligibility for WIOA-funded youth programs. 20 CFR §681.300

- CareerSource Polk has identified the following definition for youth needing additional assistance:
  - as defined by USDOL to include: juvenile offender, pregnant or parenting teen, high school dropout, youth currently out of school, homeless; and/or
  - is disabled; and/or

- An individual who has no work experience or limited work experience; or
- Is at risk of dropping out of high school (school districts recommends to place this youth into dropout prevention programs conducted within their schools). Based upon a youth's age, he/she should be at a certain grade or grade level. As an example, if the youth is not in the 11th grade based upon his age, but is in the 9th grade, he/she could be deemed as "at-risk of dropping out of high school". If the youth is not at a reading or math grade level consistent with his actual grade enrollment, than he/she could be in need of "additional assistance" and at-risk of dropping out of school.

Not more than five percent of the ISY newly enrolled in a given program year may be deemed eligible based on the "requires additional assistance to complete an educational program or to secure or hold employment" criterion.

Documentation may include, but are not limited to, legal records (for the offender), medical records (for the pregnant teen and the disabled), and school records (for the high school dropout and the disabled). For homeless youth, documentation could include written verification from an individual or agency providing temporary assistance, written statement from Social Security Agency, or an applicant statement/self-attestation, in limited cases.



careersourcepolk.com

February 25, 2020

CareerSource Florida  
Attention: Workforce Services Plan  
Tallahassee, FL

Dear Sirs:

The CareerSource Polk Four-Year Local Workforce Services Plan 2020-2024 has been approved by the Polk County Board of County Commissioners, designated as the chief elected official of the Local Workforce Development Board - Region 17, and Richard Bryant, Chair of the Polk County Workforce Development Board, Inc.

Should you have any questions related to Workforce Services Plan, please do not hesitate to contact Stacy Campbell-Domineck, President & CEO of Polk County Workforce Development Board, Inc., by phone at (863) 508-1600, x-1133 or via email at [stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@careersourcepolk.com).

  
\_\_\_\_\_  
Bill Braswell  
Chief Elected Official  
Polk County Board of County Commissioners



3/3/2020  
Date

  
\_\_\_\_\_  
Richard Bryant, Chair  
Polk County Workforce Development Board, Inc.

2.26.20  
Date

  
\_\_\_\_\_  
Stacy Campbell-Domineck, CEO  
Polk County Workforce Development Board, Inc.

02/26/2020





## MEMORANDUM OF UNDERSTANDING

### CareerSource Polk And Polk County Public Schools

#### I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the Polk County Public Schools ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

#### II. PURPOSE

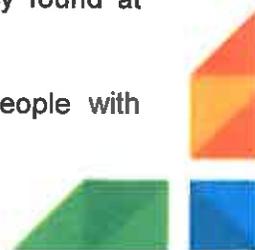
The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The One-stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-stop System.

This MOU is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

#### III. PROVISION OF SERVICES

- A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:
  1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System.
  2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
  3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.



4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Resource sharing for each Partner is outlined on Section V and Attachments A1 – A5 to this MOU.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The Polk local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements issued by the

State of Florida.

5. Maintain the statewide "CareerSource Polk" branding of each center.
6. Maintain and operate at least one comprehensive one-stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven one-stop career center.
16. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. COST SHARING/RESOURCE SHARING**

Costs of the infrastructure of the CareerSource Polk Comprehensive Career Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements. Details of the Infrastructure Funding Agreement are in section V and on Attachment 5 (Pages 12 – 16).

#### **V. INFRASTRUCTURE FUNDING AGREEMENT (IFA)**

Period of time the IFA is effective for three (3) annual periods of 7/1/17-6/30/18, 7/1/18-6/30/19, and 7/1/19-6/30/20.

One Stop Partners	Programs administered by LWDB	
SCSEP (Senior Community Service Employment Program)	WIOA Adult	Wagner Peyser
VR (Vocational Rehabilitation)	WIOA Dislocated Worker	RAUC
Division of Blind Services	WIOA Youth	Vets DVOP
Adult Ed (Polk County Public Schools)	WT TANF	RESEA
Career Tech (Traviss/Ridge)	SNAP E&T	
CSBG (Community Service Block Grant) The Agricultural and Labor Program, Inc. (ALPI)	RESEA	

**The above list only includes required partners present within our region.**

Chief Elected Officials: Polk County Board of County Commissioners

Periodic modification and review process: Annually within 6 months after fiscal year end.

Information on the steps used to reach consensus: Meetings with Partners

- Description of the process to be used to resolve issues when consensus cannot be reached:
  - The State Funding Mechanism will be triggered pursuant to WIOA law.
  - The matter will be referred to the Governor's Office for resolution.

**AUTHORITY AND SIGNATURE**

One completed, signed, and dated Authority and Signature page is required for each signatory official.

By signing my name below, I, Jacqueline Byrd, certify that I have read the above information. All of my questions have been discussed and answered satisfactorily. My signature certifies my understanding of the terms outlined herein and agreement with:

<input checked="" type="checkbox"/> The MOU	<input type="checkbox"/> The Operating Budget	<input type="checkbox"/> The Infrastructure Funding Agreement (IFA)
---	---	---

By signing this document, I also certify that I have the legal authority to bind my agency (outlined below) to the terms of:

<input checked="" type="checkbox"/> The MOU	<input type="checkbox"/> The Operating Budget	<input type="checkbox"/> The Infrastructure Funding Agreement (IFA)
---	---	---

I understand that this MOU may be executed in counterparts, each being considered an original, and that this MOU expires either:

- a. In three years,
- b. Upon amendment, modification, or termination, or
- c. On June 30, 2020, whichever occurs earlier

Signature Jacqueline M. Byrd Date 12-4-17

Jacqueline Byrd, Superintendent  
Printed Name and Title

Polk County Public Schools  
Agency Name

863-534-0500  
Agency Contact Information

## **VI. METHODS OF INTERNAL REFERRAL**

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop system.

## **VII. CONFIDENTIALITY OF RECORDS**

In the event that either party to this MOU obtains access to any records, files, or other information of the other party in connection with, or during the performance of this MOU, then that party shall keep all such records, files or other information confidential, and shall comply with all laws and regulations concerning the confidentiality of such records, files or other information to the same extent as such laws and regulations apply to the other party.

## **VIII. TERM**

This MOU becomes effective July 1, 2017 through June 30, 2020 and will be renewed for successive one-year terms. This MOU may be terminated for convenience at any time by either party upon thirty (30) days written notice.

Neither this MOU nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this MOU.

## **IX. MERGER**

This MOU constitutes and expresses the entire and integrated understanding and MOU between the parties hereto, superseding, incorporating and merging all prior understandings, MOUs, and discussions relating to the transactions contemplated hereby, and no MOUs, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

## **X. THIRD PARTY BENEFICIARY**

This MOU is for the benefit of CareerSource Polk, the Partner, and the Polk County Board of County Commissioners and no third party is an intended beneficiary.

## **XI. GOVERNANCE**

The accountability and responsibility for the One-stop System's organizational activity and accomplishments will rest with CareerSource Polk and the Polk County Board of County Commissioners. Pursuant to the Workforce Innovation and Opportunity Act of 2014, the local Board in partnership with the CEOs shall conduct oversight with respect to the One-stop System.

**CERTIFICATION:** By signing this document all parties agree that the provisions contained herein and Attachment A are subject to applicable federal, state and local laws, regulations, policies and/or guidelines relating to nondiscrimination, the privacy rights of participants, maintenance of records and other confidential information relating to CareerSource Polk customers.

IN WITNESS WHEREOF, the parties hereto cause this MOU to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement:

**SIGNATURES**

**CareerSource Polk:**

**Polk County Public Schools  
(Partner):**

**Polk County Board of  
Commission:**

*Stacy Campbell-Domineck*  
Signature

*Jacqueline M. Byrd*  
Signature 12/9/17

*R. Todd Dantzler*  
Signature

Stacy Campbell-Domineck  
Printed Name

Jacqueline Byrd  
Printed Name

R. Todd Dantzler  
Printed Name

11/01/2017  
Date

Date

Date 1/23/18 0.52



**Attachment A - 1  
(Farmworker Career Development Program)**

**FACILITIES**

Farmworker Career Development Program  
300 E. Bridgers Ave  
Auburndale, FL 33823  
Monday – Friday 8:00 AM – 4:30 PM  
PH: (863)968-5658  
FAX: (863)968-5660

**PURPOSE:**

The purpose of the program is to assist eligible migrant and seasonal farmworkers and dependents achieve economic self-sufficiency through educational, skills training and supportive services. After completion of educational and skills training they can obtain full time, year round unsubsidized employment. An allowance for training is provided. Emergency services (such as food, clothing, rent utilities, and transportation) are available to participating farmworkers. This assistance helps to sustain them until jobs can be found for them or until other state or local agencies can certify them for other services.

**SERVICES:**

- Job referral and placement through the state management information system
- Assistance to farmworkers enrolled in the FCDP program through WIOA
- Translation services for the Spanish speaking population
- TABE testing in Spanish
- Job application's assistance and other career needs in Spanish for non-English speaking customers

**LOCAL PERFORMANCE BENCHMARKS:**

- The FCDP will serve 158 eligible farmworkers per grant year
- Provide 51 placements through the state management information system over the program year (July 1<sup>st</sup> – June 30<sup>th</sup> of each year)
- Serve customers referred from the CareerSource Polk career centers

**Attachment A-2  
(Traviss Technical College)**

**FACILITIES:**

Traviss Technical College  
3225 Winter Lake Road  
Lakeland, FL 33803  
(863) 499-2700

**PURPOSE:**

The purpose of Traviss Technical College is to educate and prepare students for success in the workplace.

**SERVICES:**

- Training services and financial assistance to WIOA eligible customers
- Outreach to educate the community

**LOCAL PERFORMANCE BENCHMARKS:**

- Attend regular technical college Partner meetings
- Maintains a 75% pass rate for state licensure, and
- 82% placement rate for program completers

<b>Daytime:</b>	Class Begins	8:00 am
	Students Depart	2:00 pm

**Exceptions:**

Practical Nursing students depart at 2:30 pm

**Evening hours are:** Monday – Thursday from 3:00 pm – 9:30 pm depending on the career choice.

**Attachment A-3  
(Ridge Technical College)**

**FACILITIES:**

Ridge Technical College  
7700 State Road 544  
Winter Haven, FL 33881  
863-419-3060

**PURPOSE:**

The purpose of Ridge Technical College is to educate and prepare students for success in the workplace.

**SERVICES:**

- Training services and financial assistance to WIOA eligible customers
- Outreach to educate the community

**LOCAL PERFORMANCE BENCHMARKS:**

- Attend regular technical college Partner meetings
- Maintains a 75% pass rate for state licensure, and
- 82% placement rate for program completers

**HOURS OF OPERATION:**

<b>Daytime:</b>	Class Begins	8:00 am
	Students Depart	2:00 pm

**Exceptions:**

Commercial Vehicle Driving and Commercial Class "B" students report at 7 am – 2 pm

Practical Nursing students depart at 2:30 pm

Patient Care Technician students depart at 2:45 pm

**Evening hours are:** Monday – Thursday from 3:00 pm – 9:30 pm depending on the career choice.



**ATTACHMENT 5 - Winter Haven Costs**

Cubicle	Location	SqFt	%	Program	Provider	Name/Office
Winter Haven Center						
A1	WH CTR	119	0.69%	WP/DEO	DEO	Frank Acevedo
A2	WH CTR	119	0.69%	WP/DEO	DEO	Sherron Howard
A3	WH CTR	114	0.66%	WP/DEO	DEO	Arethia Herring
A4	WH CTR	114	0.66%	COMMON	Open	Open
A5	WH CTR	112	0.65%	WP/DEO	DEO	Carmen Cortes-Repollet
A6	WH CTR	112	0.65%	WP/DEO	DEO	Alicia Abichid
A7	WH CTR	112	0.65%	DVOP	DEO	Daniel Coy
A8	WH CTR	85	0.49%	AARP	AARP	Theresa Skipper
A9	WH CTR	85	0.49%	AARP	AARP	David Riddle
A10	WH CTR	144	0.83%	COMMON	Open	Open
A11	WH CTR	99	0.57%	WP/DEO	DEO	F Gonzalez/B Turner/G. Vasquez
A12	WH CTR	488	2.82%	ALL	CSP	Resource Room
A17	WH CTR	202	1.17%	ALL	CSP	Front Desk
B1	WH CTR	215	1.24%	ALL	CSP	Maint Room
B2	WH CTR	233	1.35%	COMMON	Open	Open
B3	WH CTR	60	0.35%	SNAP	CSP	Cameia Manning
B4	WH CTR	60	0.35%	COMMON	Open	Open
B5	WH CTR	60	0.35%	WIOA	CSP	Kimberlee Anderson
B6	WH CTR	60	0.35%	WIOA	CSP	Chanikwa Boyd
B7	WH CTR	60	0.35%	COMMON	Open	Open
B8	WH CTR	60	0.35%	WIOA	CSP	Jennifer Worrells
B9	WH CTR	210	1.21%	Program Manager	CSP	Joylette Stevens
B10	WH CTR	270	1.56%	Learn & Assess	DEO	Lab Resource Lab
B11	WH CTR	90	0.52%	Learn & Assess	CSP	Angel Echeverria
B12	WH CTR	60	0.35%	WIOA	CSP	Tangela Bryson
B13	WH CTR	60	0.35%	WIOA	CSP	Jennifer Munns
B14	WH CTR	60	0.35%	WIOA	CSP	Julie Helton
B15	WH CTR	60	0.35%	WIOA	CSP	Ethel Easterly
B16	WH CTR	60	0.35%	WIOA	CSP	Frank Hughes
B17	WH CTR	60	0.35%	RESEA	CSP	Pedro Lopez
B18	WH CTR	60	0.35%	COMMON	Open	Open
B19	WH CTR	320	1.85%	GED	Partner	E. McFarland/G. Pruitt
B20	WH CTR	416	2.41%	ALL	CSP	Staff Cafeteria
C1	WH CTR	80	0.46%	WIOA	CSP	Darlene Moton
C2	WH CTR	80	0.46%	CSP Intake/Support	CSP	Peter Piotrowski
C3	WH CTR	80	0.46%	CSP Intake/Support	CSP	Suzy Hernandez
C4	WH CTR	80	0.46%	COMMON	Open	Open
C5	WH CTR	391	2.26%	Job Readiness	CSP	Vikki Pendleton
C6	WH CTR	108	0.62%	COMMON	Open	Open
C7	WH CTR	108	0.62%	COMMON	Open	Open
C8	WH CTR	80	0.46%	COMMON	Open	Open
C9	WH CTR	80	0.46%	COMMON	Open	Open
C10	WH CTR	50	0.23%	COMMON	Open	Open
C11	WH CTR	210	1.21%	ALL	CSP	Orientation Room
C12	WH CTR	94	0.54%	ALL	CSP	IT Storage
C13	WH CTR	163	0.94%	ALL	CSP	IT Network

1st Floor 10,022 sq ft A, B, C

**ATTACHMENT 5 - Winter Haven Costs**

2nd Floor 3636 sq ft D

D1	WH CTR	180	1.04%	Bus. Svcs	CSP	Employer Office
D2	WH CTR	362	2.09%	WP/DEO	DEO/Call Ctr	Operators
D3	WH CTR	72	0.42%	COMMON	Open	Open
D4	WH CTR	72	0.42%	COMMON	Open	Open
D5	WH CTR	72	0.42%	COMMON	Open	Open
D6	WH CTR	72	0.42%	COMMON	Open	Open
D7	WH CTR	80	0.46%	COMMON	Open	Open
D8	WH CTR	135	0.75%	WP/DEO	DEO	LaTonya Mays
D9	WH CTR	135	0.75%	COMMON	Open	Open
D10	WH CTR	50	0.46%	COMMON	Open	Open
D11	WH CTR	50	0.46%	COMMON	Open	Open
D12	WH CTR	50	0.46%	COMMON	Open	Open
D13	WH CTR	928	5.33%	ALL	CSP	The Lake Conf. Rm
E1	WH CTR	196	1.13%	WIOA-Youth	WIOA-Youth	YL Conference Rm
E2	WH CTR	300	1.73%	WIOA-Youth	WIOA-Youth	YL Resource Rm
E3	WH CTR	110	0.64%	WIOA-Youth	WIOA-Youth	Clothes Closet
E4	WH CTR	221	1.25%	ALL	CSP	IT
E5	WH CTR	254	1.47%	WIOA-Youth	WIOA-Youth	Estia Switch
E6	WH CTR	264	1.53%	WIOA-Youth	WIOA-Youth	F. Rollins-E Johnson-K Roach
E7	WH CTR	256	1.48%	WIOA-Youth	WIOA-Youth	Barbara Mincy
E8	WH CTR	286	1.65%	WIOA-Youth	WIOA-Youth	YL Testing Room
E9	WH CTR	110	0.54%	WIOA-Youth	WIOA-Youth	Latisha Horton
E10	WH CTR	110	0.64%	Job Corp	Job Corp	Susan Upjager

4th Floor 3636 sq ft E

Winter Haven Center	% of Sq Ft		SqFt Occupied		% of SqFt		Common Area & Un-occupied SqFt		Total of SqFt		Building Rent
	SqFt	%	SqFt	%	SqFt	%	SqFt	%	SqFt	%	
Program Manager	210	1.21%	210	8.45%	596	8.04%	806	8.04%	13,662.83		
CDSIII Int. WIOA/WTP	240	1.39%	240	9.66%	681	9.19%	921	9.19%	15,614.67		
CDSII WIOA	180	1.04%	180	7.24%	510	6.89%	690	6.89%	11,711.00		
CDSII WTP	80	0.46%	80	3.22%	227	3.06%	307	3.06%	5,204.89		
CDSII SNAP	60	0.35%	60	2.41%	170	2.30%	230	2.30%	3,903.67		
CDSII RESEA	60	0.35%	60	2.41%	170	2.30%	230	2.30%	3,903.67		
CDSI Intake/FU/LAC	220	1.27%	220	8.85%	624	8.42%	844	8.42%	14,313.45		
WP/DEO 1st Floor	675	3.90%	675	27.16%	1914	25.83%	2589	25.83%	43,916.25		
DVOP DEO 1st Floor	112	0.65%	112	4.51%	318	4.29%	430	4.29%	7,286.84		
Job Readiness Vikki Pendleton	391	2.26%	391	15.73%	1109	14.97%	1500	14.97%	25,438.90		
IT 1st FLOOR	257	1.49%	257	10.34%	729	9.84%	986	9.84%	16,720.71		
AARP	170	0.98%	0	0.00%	0	1.70%	170	1.70%	2,883.45		
GED PCSB	320	1.85%	0	0.00%	0	3.19%	320	3.19%	5,427.68		
Common Area 1st Floor	7047	40.75%	2485	100.00%	7047	100.00%	10022	100.00%	169,988.00		
WP/DEO 2nd Floor	497	2.87%	497	73.41%	2172	73.41%	2669	73.41%	29,201.75		
Business Services 2nd Floor	180	1.04%	180	26.59%	787	26.59%	967	26.59%	10,576.09		
Common Area 2nd Floor	2959	17.11%	677	100.00%	2959	100.00%	3636	100.00%	39,777.84		
WIOA/Youth 4TH FLOOR	1776	10.27%	1776	88.93%	1360	86.24%	3136	86.24%	34,305.56		
IT 4TH FLOOR	221	1.28%	221	11.07%	169	10.73%	390	10.73%	4,268.88		
Job Corp 4TH FLOOR	110	0.64%	0	0.00%	0	3.03%	110	3.03%	1,203.40		
Common Area 4th Floor	1529	8.84%	1997	100.00%	1529	100.00%	3636	100.00%	39,777.84		
<b>Total Square Footage</b>	<b>17,294</b>	<b>11535</b>	<b>10318</b>		<b>11535</b>		<b>17294</b>		<b>189,196.36</b>		



WINTER HAVEN CAREER CENTER

FUNDING SOURCE	FTE'S	% OF FTE'S
WELFARE TRANSITION	5.0142	17.91%
WIOA ADULT	5.9394	18.82%
WIOA DISLOCATED WORKERS		2.39%
SNAP	2.0464	7.31%
RESEA	1.0000	3.57%
RA/UC	0.0000	0.00%
	0.0000	14.00%
WAGNER-PEYSER	7.0000	25.00%
DVOP	1.0000	3.57%
AARP	0.0000	8.00%
GED (PCSB)	2.0000	7.14%
MFSW	2.0000	7.14%
<b>TOTAL</b>	<b>28.00</b>	<b>100.00%</b>

<b>Funding</b>
WIOA Adult
WIOA Dislocated Worker
Welfare Transition (TAMF)
SNAP
RA
RESEA
Wagner Peysier
DVOP
AARP
GED (PCSB)
MFSW
Total

FUNDING SOURCE	FTE'S	% OF FTE'S
WELFARE TRANSITION	5.0142	22.79%
WIOA ADULT	5.9394	23.96%
WIOA DISLOCATED WORKERS		3.04%
SNAP	2.0464	9.30%
RESEA	1.0000	4.55%
RA/UC	0.0000	0.00%
	0.0000	14.00%
WAGNER-PEYSER	7.0000	31.82%
DVOP	1.0000	4.55%
AARP	0.0000	8.00%
GED (PCSB)		0.00%
MFSW		0.00%
<b>TOTAL</b>	<b>22.00</b>	<b>100.00%</b>

<b>Funding</b>
WIOA Adult
WIOA Dislocated Worker
Welfare Transition (TAMF)
SNAP
RA
RESEA
Wagner Peysier
DVOP
AARP
GED (PCSB)
MFSW
Total



Addendum to CAREER SOURCE MOU Contract, Dated: July 1, 2017

**PUBLIC RECORDS/CONTRACTS FOR SERVICES AS DEFINED IN F.S. 119.0701**

This is a contract for services as defined in F.S. 119.0701. Accordingly, the Consultant/Contractor must comply with public records laws, specifically, the Consultant/Contractor must:

- 1) Keep and maintain public records required by the public agency to perform the service.
- 2) Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
- 3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Consultant/Contractor does not transfer the records to the public agency.
- 4) Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of the Consultant/Contractor or keep and maintain public records required by the public agency to perform the service. If the Consultant/Contractor transfers all public records to the public agency upon completion of the contract, the Consultant/Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant/Contractor keeps and maintains public records upon completion of the contract, the Consultant/Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from the public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.

Public records means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business with the School Board of Polk County, Florida. Consultant/Contractor's records may include, but are not limited to, supplier/subcontractor invoices and contracts, project documents, meeting notes, emails and all other documentation generated during the contract term.

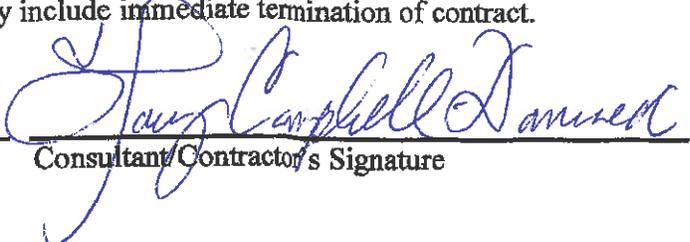
Records must be created and maintained in accordance with the General Records Schedule GS1-SL for State and Local Government Agencies.

**IF THE CONSULTANT/CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT/CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE PUBLIC RECORDS OFFICE AT:**

**THE SCHOOL BOARD OF POLK COUNTY, FLORIDA**  
**PO BOX 391**  
**BARTOW, FL 33831-0391**  
**TELEPHONE: 863-534-0522**  
**otrs.publicrecords@polk-fl.net**

If the Consultant/Contractor does not comply with a public records request, the School Board of Polk County, Florida shall enforce the contract provisions which may include immediate termination of contract.

11/14/2017  
Date:

  
Consultant/Contractor's Signature

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

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

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

I. Purpose.

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

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

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

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

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

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

II. Authority and Responsibility of the County.

The COUNTY shall have the following responsibilities and authority:

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

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

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

IV. Term.

The term of this Agreement shall begin on July 1, 2017 and shall run through June 30, 2020.

V. Merger.

It is understood and agreed that the entire Agreement between the parties is contained herein and that this Agreement supersedes any oral agreements and/or negotiations between the parties relating to the subject matter hereof. All items referred to in this Agreement are incorporated and deemed a part of this Agreement.

VI. Modification.

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

VII. Independence of Terms.

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

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Polk County Workforce Development Board, Inc., through its Chairman, authorized to execute it by Board action on the 15<sup>th</sup> day of June, 2017 and by Polk County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 6<sup>th</sup> day of June, 2017.

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

By: [Signature]  
Board Chair

This 15<sup>th</sup> day of June, 2017

ATTEST: Stacy M. Butterfield, Clerk

By: [Signature]  
Deputy Clerk

**POLK COUNTY Board of County Commissioners**

By: [Signature]  
Chairman

This 16<sup>th</sup> day of June, 2017



Reviewed as to form and legality

[Signature] 6/15/17  
County Attorney Date

Agreement between  
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3. Develop, review and monitor appropriate memorandum of understanding (between the local board and the required one-stop partners) concerning the operation of the one-stop delivery system in the local area. This will include at a minimum:
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4. Continuous Improvement of One-Stop Centers: develop strategies to improve coordination of services across one-stop partner programs to enhance service delivery and improve efficiencies, including at a minimum:
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**POLK COUNTY WORKFORCE DEVELOPMENT BOARD, INC.**

By: [Signature]  
Board Chair

This 15<sup>th</sup> day of June, 2017

ATTEST: Stacy M. Butterfield, Clerk

By: [Signature]  
Deputy Clerk

**POLK COUNTY Board of County Commissioners**

By: [Signature]  
Chairman

This 16<sup>th</sup> day of June, 2017



Reviewed as to form and legality

[Signature] 6/15/17  
County Attorney Date

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IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature. The Polk County Workforce Development Board, Inc., through its Chairman, authorized to execute it by Board action on the 15<sup>th</sup> day of June, 2017 and by Polk County, through its Board of County Commissioners, signing by and through its Chairman, authorized to execute it by Board action on the 6<sup>th</sup> day of June, 2017.

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

By: [Signature]  
Board Chair

This 15<sup>th</sup> day of June, 2017

ATTEST: Stacy M. Butterfield, Clerk

By: [Signature]  
Deputy Clerk

**POLK COUNTY Board of County Commissioners**

By: [Signature]  
Chairman

This 16<sup>th</sup> day of June, 2017



Reviewed as to form and legality

[Signature] 6/15/17  
County Attorney Date

**ATTACHMENT E – PUBLIC COMMENTS**

No public comments received.

Copy of Published Notice attached.

As Published at CareerSourcepolk.com

Public Comment is being solicited on the Comprehensive Four-Year Workforce Services Plan for CareerSource Polk covering years 2020-2024. The draft plan update can be viewed [HERE](#). Comments and questions will be accepted until 5:00 P.M on January 31, 2020.

Four-Year Workforce Services Plan draft can be viewed [HERE](#).

### **Attachments A & B – Memorandum of Understanding and Infrastructure Funding Agreements**

1. [AARP Foundation/Senior Community Service Employment Program](#)
2. [ALPHI](#)
3. [Division of Blind Services](#)
4. [Division of Vocational Rehabilitation](#)
5. [Lakeland Housing Authority](#)
6. [Polk County Public Schools](#)

### **Attachment C – Single Entity Operation Agreement**

1. [Agreement with Polk County, a political subdivision of the State of Florida](#)

### **Attachment D – Workforce Development Board**

1. [Board Member Roster](#)
2. Meeting Minutes for local plan agenda items

### **Attachment E – Public Comments**

1. Public Comment Form – Closed January 31, 2020

### **Attachment F – Interlocal Agreement\**

1. [Interlocal Agreement with Polk County, a political subdivision of the State of Florida](#)

### **Attachment G – Current By-Laws**

1. [ByLaws](#)

MEMORANDUM OF UNDERSTANDING

CareerSource Polk  
And  
Agricultural and Labor Program, Inc. (ALPI)

**I. PARTIES**

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the **Agricultural and Labor Program, Inc.** ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

**II. PURPOSE**

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The One-stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-stop System.

This MOU is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

**III. PROVISION OF SERVICES**

A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:

1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System.
2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.
4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials



that are available through the One-stop System.

5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Attachment A of this MOU contains the resource sharing for each Partner.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The Polk local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements issued by the State of Florida.
  5. Maintain the statewide "CareerSource Polk" branding of each center.

6. Maintain and operate at least one comprehensive one-stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven one-stop career center.
16. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. ASSURANCES**

##### **A. Monitoring**

CareerSource Polk or its designated staff, officials from the State and Local administrative entities, the U.S. Departments of Labor, Education, and Health and Human Services have the authority to conduct fiscal and programmatic monitoring to ensure that:

- ❖ Federal awards are used for authorized purposes in compliance with law, regulations, and state policies,
- ❖ Those laws, regulations, and policies are enforced properly,
- ❖ Performance data are recorded, tracked, and reviewed for quality to ensure accuracy and completeness,
- ❖ Outcomes are assessed and analyzed periodically to ensure that performance goals are met,
- ❖ Appropriate procedures and internal controls are maintained, and record retention policies are followed, and

- ❖ All MOU terms and conditions are fulfilled.

All parties to this MOU should expect regular fiscal and programmatic monitoring to be conducted by each of the above entities, as appropriate.

## **B. Non-Discrimination and Equal Opportunity**

All parties to this MOU certify that they prohibit, and will continue to prohibit, discrimination, and they certify that no person, otherwise qualified, is denied employment, services or other benefits on the basis of (i) political or religious affiliation, marital status, sexual orientation, gender, gender identification and/or expression, race, color, creed, or national origin; (ii) sex or age, except when age or sex constitutes a bona fide occupational qualification; or (iii) the physical or mental disability of a qualified individual with a disability.

The Parties specifically agree that they will comply with Section 188 of the WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38; Final Rule December 2, 2016), the Americans with Disabilities Act (42 U.S.C. 12101 et seq), the Non-traditional Employment for Women Act of 1991, titles VI and VII of the Civil Rights of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, The Age Discrimination Act of 1967, as amended, title IX of the Education Amendments of 1972, as amended, and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR Part 37 and 38.

## **C. Indemnification**

All Parties to this MOU recognize the Partnership consists of various levels of government, not-for-profit, and for-profit entities. Each party to this agreement shall be responsible for injury to persons or damage to property resulting from negligence on the part of itself, its employees, its agents, or its officers. No Partner assumes any responsibility for any other party, State or non-State for the consequences of any act or omission of any third party. The Parties acknowledge CareerSource Polk and the one-stop operator have no responsibility and/or liability for any actions of the one-stop center employees, agents, and/or assignees. Likewise, the Parties have no responsibility and/or liability for any actions of CareerSource Polk or the one-stop operator.

## **D. Severability**

If any part of this MOU is found to be null and void or is otherwise stricken, the rest of this MOU shall remain in force.

## **E. Drug and Alcohol-free Workplace**

All Parties to this MOU certify they will comply with the Drug-Free Workplace Act of 1988, 41 U.S.C. 702 et seq., and 2 CFR part 182 which require that all organizations receiving grants from any Federal agency maintain a drug-free workplace. The recipient must notify the awarding office if any employee of the recipient is convicted of violating a criminal drug statute. Failure to comply with these requirements may be cause for suspension or debarment under 2 CFR part 180, as adopted by the U.S. Department of Education at 2 CFR 3485, and the U.S. Department of Labor regulations at 29 CFR part 94.

## **F. Certification Regarding Lobbying**

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance

at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

**G. Debarment and Suspension**

All parties shall comply with the debarment and suspension requirements (E.O.12549 and 12689) and 2 CFR part 180 and as adopted by the U.S. Department of Labor at 29 CFR part 2998 and by the U.S. Department of Education at 2 CFR 3485.

**H. Priority of Service**

All Parties certify that they will adhere to all statutes, regulations, policies, and plans regarding priority of service, including, but not limited, priority of service for veterans and their eligible spouses, and priority of service for the WIOA title I Adult program, as required by 38 U.S. C. sec. 4215 and its implementing regulations and guidance, and WIOA sec. 134(c)(3)(E) and its implementing regulations and guidance. Partners will target recruitment of special populations that receive a focus for services under WIOA, such as individuals with disabilities, low-income individuals, basic skills deficient youth, and English language learners.

**V. SIGNATURES**

IN WITNESS WHEREOF, Partner and CareerSource Polk have caused this MOU and IFA to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement with this MOU and IFA:

**CareerSource Polk:**

**Agricultural and Labor  
Program, Inc. (ALPI)**

**Polk County Board of  
Commission:**

*Stacy Campbell-Dominick*  
**Signature**  
Stacy Campbell-Dominick  
**Printed Name**  
2/1/2018  
**Date**

**(Partner):**  
*Deloris Johnson*  
**Signature**  
Deloris Johnson  
**Printed Name**  
1-24-18  
**Date**

*R. Todd Dantzler*  
**Signature**  
R. Todd Dantzler  
**Printed Name**  
3/1/18  
**Date**



Q.50



**INFRASTRUCTURE AGREEMENT  
 ONE-STOP CAREER CENTER SYSTEM  
 BY AND BETWEEN CAREERSOURCE POLK  
 AND  
 Agricultural and Labor Program, Inc.**

**I. PARTIES**

This Infrastructure Agreement (“IFA”) is made pursuant to the Workforce Innovation Act of 2014 (“the Act”), and is entered into by ~~Click or tap here to enter text.~~ And CareerSource Polk (“CareerSource”).

The contact information for Partner is as follows:

Name/Title: Deloris Johnson

Telephone:

Email:

**II. PURPOSE**

The Workforce Innovation & Opportunity Act (WIOA) is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its American Job Center (AJC) One-Stop customer delivery system. The AJC One-Stop system assures coordination between the activities authorized in and linked to the Act.

WIOA requires Local Workforce Development Boards (LWDBs) to develop and finalize Infrastructure Funding Agreements (IFA) with all required partners that carry out their programs in the local area.

The purpose of this agreement is to establish a financial plan, including terms and conditions, to fund the services and operating costs of the AJC One-Stop customer delivery system. The Parties to this infrastructure Agreement (IFA) agree that joint funding is a necessary foundation for an integrated service delivery system. The goal of the operating budget is to develop a funding mechanism that:

- a) Establishes and maintains the local workforce delivery system at a level that meets the needs of the job seekers and businesses in the Local area,
- b) Reduces duplication and maximizes program impact through the sharing of services, resources, and technologies among Partners (thereby improving each program’s effectiveness),
- c) Reduces duplication by establishing data sharing as it relates to participant records for outcome information,
- d) Reduces overhead costs for any one partner by streamlining and sharing financial, procurement, and facility costs, and
- e) Ensures that costs are appropriately shared by determining contributions based on the proportionate use of the one-stop centers and relative benefits received, and requiring that all funds are spent solely for allowable purposes in a manner consistent with the applicable authorizing statutes and all other applicable legal requirements, including the Uniform Guidance.

The Partners consider this one-stop operating budget the master budget that is necessary to maintain the high standard One-Stop delivery system. It includes the following cost categories, as required by WIOA and its implementing regulations.

- a) Infrastructure costs (also separately outlined in the Infrastructure Funding Agreement (IFA),
- b) Career Services, and
- c) Shared services

All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis. The one-stop operating budget is transparent and negotiated among Partners on an equitable basis to ensure costs are shared appropriately. All Partners negotiated in good faith and sought to establish outcomes that are reasonable and fair.

### **III. PARTNERS**

Each Partner commits to cross training of staff, as appropriate, and to providing other professional learning opportunities that promote continuous quality improvement. Partners will further promote system integration to the maximum extent feasible through:

- a) Effective communication, information sharing, and collaboration with the one-stop operator,
- b) Joint planning, policy development, and system design processes,
- c) Commitment to the joint goals, strategies, and performance measures,
- d) The use of common and/or linked data management systems and data sharing methods, as appropriate
- e) Leveraging of resources including other public agency and non-profit organization services
- f) Participation in a continuous improvement process designed to boost outcomes and increase customer satisfaction, and
- g) Participation in scheduled Partner meetings to exchange information in support of the above and encourage program and staff integration.

### **IV. ONE-STOP OPERATING BUDGET**

The purpose of this section is to establish a financial plan, including terms and conditions, to fund the services and operating cost of the One-Stop Centers. The local Workforce Development Board based operating costs solely on the infrastructure costs and career services costs included in the following operating budget below.

Below is the overall estimated annual operating budget for the local One-Stop system:  
Comprehensive AJC (CareerSource Polk – Winter Haven)

**Infrastructure (IFA) Budget  
PY2017-2018**

<b>Description</b>	<b>Operating Budget</b>
<b>Infrastructure costs:</b>	
Office Rent/Lease	189,196
Utilities	1,286
Repairs & Maintenance	1,565
Institutional Supplies	402
Telephone	24,366
Furniture/Equipment	21,478
IT Network (software, licenses, & supplies)	44,520
Equipment Rental/Maintenance	9,660
<b>Additional Costs:</b>	
Career Services (Resource Room)	17,850
<b>Total Costs</b>	<b>310,323</b>

**V. COST ALLOCATION METHODOLOGY**

All required Partners have agreed to provide access to their programs in the comprehensive One-Stop Career Center and contribute to the infrastructure costs. Partners will have staff co-located in the Center (on a full or part-time basis) or will provide access via direct linkage as outlined in Attachment B (Partner Representation Schedule) and will fund the infrastructure costs based on a percentage of the partner's annual FTE. (All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis.)

The UI program, as required partner, will not be physically located in the One-Stop Career Center but must contribute to the cost of infrastructure. The UI program and other required partners who have elected not to have staff co-located in the AJC will utilize a "direct linkage" that will allow customers to connect with partner program staff to access services. Cross-trained front-desk and other physically co-located staff can assist in providing information and referrals to the direct-linkage partners. Partners utilizing direct linkage must contribute to the Infrastructure cost equivalent a minimum of 0.2 FTE or 8 hours per week (1 FTE is equivalent to 40 hours/week) or equivalent a minimum of 0.1 FTE or 4 hours per week.

The LWDB selected the cost allocation bases to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners' contributions having to be in proportion to the Partners' use of the AJC and relative benefit received.

As outlined in the MOUI, the costs of the infrastructure of AJC One-Stop Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements.

## VI. PARTNER CONTRIBUTION

Below is the partner contribution cost determination:

Estimated Cost per FTE	Estimated Infrastructure Costs
	<b>Total Partner FTE</b> <b>\$310,323/29.7=\$10,448.58</b>
<b>CareerSource Polk FTE Contribution</b> <i>(Partners who elected to have their representatives in the Career Center on a Full or Part time basis to serve customers.)</i>	<i>Partner FTE X Estimated Cost per FTE</i> <b>0.1 FTE X 10,448.58=\$1,044.86</b> <b>(0.1 FTE represents 4 hours a week commitment)</b> <b>0.2 FTE X \$10,448.58=\$2,089.72</b> <b>(0.2 FTE represents 8 hours a week commitment)</b>
<b>Partners Direct Linkage Contribution</b> <i>(Partners who elected not to have their representatives in the Career Center but offer a technology option to serve customers)</i>	Minimum of 0.1 FTE or 4 hours a week Minimum of 0.2 FTE or 8 hours a week Contribution = 0.1 X Estimated Cost per FTE Contribution = 0.2 X Estimated Cost per FTE

### FUNDING TYPES AND SOURCES

The permissible types of funds used for infrastructure costs and additional cost of operating a local One-Stop delivery system (i.e. partner's program or administrative funds) may differ depending upon the partners program's authorizing law and implementing regulations. The funds that may be used also differ based on whether the amount that must be contributed by a partner for infrastructure costs is determined under the Local Funding Model or the State Funding Model. (Copy of the TEG 17-16: Infrastructure Funding of the One-Stop Delivery system can be found at:

[https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)

**Types.** Funding for infrastructure costs and additional costs may be in the form of:

- CASH, NON-CASH and THIRD-PARTY IN KIND CONTRIBUTIONS \*\*\*
- Funding from philanthropic organizations or other private entities; or
- Other alternative financing options (described in WIOA sec. 121(c)(2)(A)(ii) and 20 CFR 678.715, 34 CFR 361.715, and 34 CFR 463.715.

Some partner programs may have statutory or regulatory prohibitions against using certain types of these contribution or on how the program may treat these contributions for fiscal accountability purposes under the respective program's requirements.

\*\*\*

#### Cash

Cash funds provided to the Local WDB or its designee by one-stop Partners, either directly or by an interagency transfer, or by a third party.

#### Non-Cash

- ❖ Expenditures incurred by one-stop Partners on behalf of the one-stop center; and
- ❖ Non-cash contributions or goods or services contributed by a Partner program and used by the One-Stop center.

The value of non-cash and third-party in-kind contributions must be fairly evaluated in accordance with the Uniform Guidance at 2 CFR 200.306.

### **Third Party In-Kind**

Contributions of space, equipment, technology, non-personnel services, or other like items to support the infrastructure costs associated with one-stop operations, by a non-one-stop Partner to:

- ❖ Support the One-Stop Center in general; or
- ❖ Support the proportionate share of One-Stop infrastructure costs of a specific partner.

**Sources.** The source of funds that may be used to pay for infrastructure costs depends on the requirements regarding use of funds under the law authorizing the partner program that is contributing the funding. The infrastructure funding may be from funds classified as administrative, program, or both, depending on the partner program's requirements.

## **VII. COST RECONCILIATION**

All parties agree that a bi-annual reconciliation of budgeted and actual costs and update of the allocation bases will be provided for the review.

The LWDB will submit invoices to the Partners and send a copy of the updated budget to all Parties. Partners will communicate any disputes with costs in the invoice or the budget to the LWDB in writing. The LWDB will review the disputed cost items and respond accordingly to the Partner. When necessary, the LWDB will revise the invoice and the adjusted budget upon resolution of the dispute.

One-Stop delivery system infrastructure costs are defined as non-personnel costs that are necessary for the general operation of the one-stop career center, including, but not limited to: rental of the facilities; utilities and maintenance; equipment, including assessment-related products and assistive technology for individuals with disabilities; and, technology to facilitate access to the One-Stop delivery system, including technology used for the center's planning and outreach activities. This may also include the costs associated with the development and use of the common identifier (i.e., American Job Center signage) and supplies, as defined in Uniform Guidance at 2 CFR 200.94, to support the general operation of the one-stop career center (WIOA sec. 1221 (h)(4) and 20 CFR 678.700(a), and 34 CFR 446.700(a)).

Non-personnel costs are costs that are not compensation for personnel costs. For example, technology-related services performed by vendors or contractors are non-personnel costs and may be identified as infrastructure costs if they are necessary for the general operation for the one-stop career center. Such costs would include service contracts with vendors or contractors, equipment and supplies.

Personnel services include salaries, wages, and fringe benefits of the employees of partner programs or their subrecipients, as described in 2 CFR 200.430 & 200.431 of the Uniform Guidance. For example, allocable salary and fringe costs of partner program staff who work on information technology systems (e.g., common performance and reporting outcomes) for us4e by the one-stop center as a whole would be personnel costs. The costs of a shared welcome desk or greeter directing employers and customers to the services or staff that are available in that one-stop career center is a personnel expense. These costs, therefore, could not be included in infrastructure costs but are included in "additional costs."

All Parties to this IFA recognize that infrastructure costs are applicable to all required Partners, whether they are physically located in the One-Stop career center or not. Each partner's contributions to these costs, however, may vary, as these contributions are based on the proportionate use and relative benefit received, consistent with the Partner programs authorizing laws and regulations and the Uniform Guidance.

## VIII. METHODS OF INTERNAL REFERRAL

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need, to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop delivery system.

The primary principle of the referral system is to provide integrated and seamless delivery of services to workers, job seekers, and employers. In order to facilitate such a system,

Partners agree to:

- a) Familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partners' programs represented in the local American Job Center network;
- b) Develop materials summarizing their program requirements and making them available for Partners and customers;
- c) Provide a paragraph regarding a description of services with website link to organization/entity to be placed on CSP website for ease and consistency of referrals.
- d) Develop and utilize common intake, eligibility determination, assessment, and registration forms;
- e) Provide substantive referrals to customers who are eligible for supplemental and complementary services and benefits under partner programs,
- f) Regularly evaluate ways to improve the referral process, including the use of customer satisfaction surveys,
- g) Commit to robust and ongoing communication required for an effective referral process, and
- h) Commit to actively follow up on the results of referrals and assuring that Partner resources are being leveraged at an optimal level.

## IX. DATA SHARING

CareerSource Polk will provide employment services to individuals participating in the partner programs and aggregated information to assist the Partner in its evaluation of the effectiveness of programs as it relates to the employment of students who have participated in partner programs. The Partner will utilize this information for tracking Return on Investment (ROI). All data received will remain confidential and CareerSource Polk will only allow those employees who have a legitimate need to access the information with access to the personally identifiable information provided by the Partner.

Partners agree that the use of high-quality, integrated data is essential to inform decisions made by policymakers, employers, and job seekers. Additionally, it is vital to develop and maintain an integrated case management system, as appropriate, that informs customer service throughout customers' interaction with the integrated system and allows information collected from customers at intake to be captured once.

Partners further agree that the collection, use, and disclosure of customers' personally identifiable information (PII) is subject to various requirements set forth in Federal and State privacy laws. Partners acknowledge that the execution of this MOU, by itself, does not function to satisfy all of these requirements.

All data, including customer PII, collected, used, and disclosed by Partners will be subject to the following:

- a) Customer PII will be properly secured in accordance with the Local WDB's policies and procedures regarding the safeguarding of PII.
- b) The collection, use, and disclosure of customer education records, and the PII contained therein, as defined under FERPA, shall comply with FERPA and applicable State privacy laws.
- c) All confidential data contained in UI wage records must be protected in accordance with the requirements set forth in 20 CFR Part 603.
- d) All personal information contained in VR records must be protected in accordance with the requirements set forth in 34 CFR 361.38.
- e) Customer data may be shared with other programs, for those program's purposes, within the American Job Center network only after the informed written consent of the individual has been obtained, where required.
- f) Customer data will be kept confidential, consistent with Federal and State privacy laws and regulations.
- g) All data exchange activity will be conducted in machine readable format, such as HTML or PDF, for example, and in compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).

All one-stop career center and Partner staff will be trained in the protection, use, and disclosure requirements governing PII and any other confidential data for all applicable programs, including FERPA-protected education records, confidential information in UI records, and personal information in VR records.

#### **X. TERM**

The Term of this IFA shall commence on July 1, 2017, or the date last executed by both parties, whichever is later, through June 30, 2018, and will automatically renew annually for successive one-year terms, unless otherwise terminated by either party. The parties agree to review this IFA no less than once every three-year period to ensure appropriate funding and delivery of services. This IFA may be terminated for convenience at any time by either party upon thirty (30) days written notice.

#### **XI. AMENDMENTS AND MODIFICATIONS**

Neither this IFA nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this Agreement sent via certified U.S. mail.

#### **XII. MERGER**

This IFA constitutes and expresses the entire and integrated understanding and agreement between the parties hereto, superseding, incorporating and merging all prior understandings, agreements, and discussions relating to the transactions contemplated hereby, and no agreements, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

#### **XIII. THIRD PARTY BENEFICIARY**

The Parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this IFA. None of the Parties intend to directly or substantially benefit a third party by this IFA. The Parties agree that there are no third-party beneficiaries to this IFA and that no third party shall be entitled to assert a claim against any of the Parties based upon this IFA.

#### **XIV. GOVERNANCE**

The accountability and responsibility for the One-Stop career center system's organizational activity and accomplishments will rest with CareerSource Polk. Pursuant to the Act CareerSource shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this IFA will be resolved in accordance with CareerSource Polk's Grievance/Complaint and Hearing/Appeal Procedures.

#### **XV. DISPUTE RESOLUTION**

If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

CareerSource Polk Winter Haven Career Center Partners							
Required Program Partners	Governance	Local Grantee	# of Staff	Total weekly Staff Hours	Total # of FTEs	% of Total FTEs	Partner Contribution
Adult, Dislocated Workers, Youth Formula Grants	DOL	CSP	13	520	13	43.77%	135,831.48
Job Corps*	DOL	Job Corps	1	40	1	3.37%	10,448.58
Wagner Peyser	DOL	CSP	7	280	7	23.57%	73,140.30
Senior Community Employment Service Program	DOL	AARP	1	40	.1	.34%	1,044.86
TAA Program Trade Adjustment Act RESEA	DOL	CSP	0	0	0	.00%	00.00
	DOL	CSP	1	40	1	3.37%	10,448.58
UC Programs**	DOL	CSP	0	0	0	.00%	00.00
Veteran Program DVOP	DOL	CSP	1	40	1	3.37%	10,448.58
Adult Education GED , Career Tech (Ridge & Travis)	DOE	PCSB	2	32	1	3.37%	10,448.58
Vocational Rehabilitation**	DOE	VR	1	8	.2	.67%	2,089.72
Division of Blind Services***	DOE	Florida Division of Blind Services	1	8	.2	.67%	2,089.72
Welfare Transition	HHS/TANF	CSP	4	160	4	13.47%	41,794.30
SNAP Employment & Training	HHS	CSP	1	40	1	3.37%	10,448.58
ALPI***	HHS	ALPI	1	8	.2	.67%	2,089.72
Total			34		29.7		310,323.00

- Estimated Infrastructure Budget
  1. Total= \$310,323.00. This amount is required to determine the Costs per FTE.
- Infrastructure Contribution (Estimated)
  1. Cost per FTE=IFR Budget Total/Total FTE
  2. Cost per FTE= \$10,448.58
- Estimated Partner Infrastructure Contribution
  1. Cost per FTE x Partners total # of FTEs
- Direct Linkage Infrastructure Contribution
  1. Direct Linkage is defined as a minimum of 8 hours/ 40 a week (.02 FTE) and 4 hours/40 a week (.01 FTE) of time for access through technology.
  2. Direct Linkage = \$2,089.72 and \$1,044.86

\*Job Corps in contract negotiations; will contribute after January 2018.

\*\* Unemployment Compensation: Direct Linkage; State of Florida DEO will determine contribution level.

\*\*\*Vocational Rehabilitation, Division of Blind Services, ALPI, and AARP: Direct Linkage

**AGENDA**  
**BOARD OF DIRECTORS MEETING**  
**600 North Broadway | BB&T Bank Building, 3rd Floor | Community Room**  
**February 20, 2020 @ 11:30 am**

**CONFLICT OF INTEREST**

Board and Council members are reminded of conflict of interest provisions. In declaring a conflict, please refrain from voting or discussion and declare the following information: 1) Your name and position on the Board, 2) the nature of the conflict and 3) who will gain or lose as a result of the conflict. Please also fill out form 8B prior to the meeting whether or not you are able to attend the meeting if you have a conflict with any agenda items.

**Quorum** is established by having one-third of the current membership present. For this meeting, there must be at least 8 (22 x 1/3) members present. In addition, at least 51% must be from the private sector.

**WELCOME & INTRODUCTIONS****Richard Bryant, Chair****APPROVAL OF MINUTES**

Recommendation: Approval of Board of Directors Meeting Minutes for November 21, 2019 Pages 2-3

**ACCEPTANCE OF CONSENT AGENDA (Pages 9-43)**

Report: Budget Variance 1<sup>st</sup> Quarter Report through December 2019 Pages 11-13  
Report: Unrestricted Funds 2<sup>nd</sup> Quarter Report through December 2019 Pages 14  
Report: Related Party Transactions 2<sup>nd</sup> Quarter Report through December 2019 Page 15  
Report: Business Services 2<sup>nd</sup> Quarter Report through December 2019 Pages 16-17  
Report: One-Stop Performance Report Card Page 18  
Report: ITA Provider Expenditure Analysis 2<sup>nd</sup> Quarter Page 19  
Report: ITA Provider Enrollment vs. Placement Analysis 2<sup>nd</sup> Quarter Page 20  
Report: One-Stop Operator Compliance Report 2<sup>nd</sup> Quarter Pages 21-31  
Report: Direct Provider of Services Compliance Semi-Annual Report Pages 32-38  
Report: Customer Foot Traffic Report 2<sup>nd</sup> Quarter Page 39  
Report: Customer Concerns Report 2<sup>nd</sup> Quarter Page 40  
Report: Young Leaders 2<sup>nd</sup> Quarter Report through December 2019 Pages 41-43

**OLD BUSINESS: N/A****REGIONAL PERFORMANCE PRESENTATION:** Representative from Department of Economic Opportunity**NEW BUSINESS****Board Chair Recommendations (Richard Bryant)**

Recommendation: Approval of Four-Year Local Workforce Services Plan for PY2020-2024 Page 4

Recommendation: Board Member Attendance Compliance Report Page 5

**Finance/Audit Committee (David McCraw)**

Recommendation: Approval of Form 990 Return of Organization Exempt from Income Tax Attached

**Workforce Performance Council (Gary Clark):**

Recommendation: Approval of ITA Provider for Initial Eligibility: Tampa Truck Driving School Page 6

Recommendation: Approval to let RFP for Merchandise/Fuel Cards Page 7

**Youth Development Council (Katrina Lunsford)**

Recommendation: Approval to operate a Pilot "Tech Hire Boot Camp Initiative" Page 8

**ADJOURN**



**MINUTES**  
**BOARD OF DIRECTOR'S MEETING**  
**BB&T Bank Building | 600 North Broadway, Bartow, FL**  
**CEO Conference Room – 2nd Floor**  
**February 20, 2020 | 11:30am**

<b>Members</b>		<b>Members</b>		<b>Members</b>		<b>Staff &amp; Guests Present</b>
Bryant, Richard <b>Chair</b>	P	Hall, Lisa	P	Rider, Melody	P	S. Campbell-Domineck
Altieri, Jorge	P	Jantomaso, Cyndi	E	Sapp, Sherry	P	Luz Heredia
Case, Karen	P	Khan, Adil	P	Simmons, Diana	E	Eshia Smith
Clark, Gary	P	Lunsford, Katrina	P	Sorg, David	P	Aralia Oldham-Wesley
Dimmick, Scott	P	McCraw, David	P	Tripp, Huston	P	Eshia Smith
Gander, Patti	P	Miller, Jr., Albert	P	Wilson, Amanda	P	Betty LeBranch
Garcia-Falconetti, Angela	P	Olivas, Yesse	P	Wright, Sharon	P	Casey Penn – DEO (call-in)
						Melisa Welker, Ed2Go

**CALL TO ORDER**

The meeting was called to order at 11:30am by Chair Bryant followed by introductions of those present.

**APPROVAL OF MINUTES**

Motion to approve the Board of Directors meeting minutes for November 21, 2019 made by Gary Clark, seconded by Katrina Lunsford. All voted. Motion carried.

**ACCEPTANCE OF CONSENT AGENDA**

Motion to approve the Consent Agenda made by Gary Clark, seconded by Katrina Lunsford. All voted. Motion carried.

**OLD BUSINESS: N/A**

**REGIONAL PERFORMANCE PRESENTATION: Casey, Penn, Department of Economic Opportunity**

Casey Penn called made the Regional Performance Presentation for Program Year 2018-2019. He presented an overview of the Workforce Structure, Local Elected Officials Roles and Responsibilities, Primary Indicators of Performance versus PY2018 Local Actual Performance, and USDOL Monitoring Activity. He highlighted the outstanding local performance where CSP met and exceeded in all measures.

Chair Bryant commended staff for the outstanding performance and ask all Board members to recognize staff with a round of applause.

**NEW BUSINESS:**

**Board Chair Recommendations (Richard Bryant)**

Recommendation: Approval of Four-Year Local Workforce Services Plan for PY2020-2024

Gary Clark moved to approve the Four-Year Local Workforce Services Plan for PY2020-2024. Amanda Wilson seconded it. Floor opened for discussion. CEO explained the process and requirements of the Plan and the timeline we have followed including posting the plan for Public Comments. We received no comments to the plan. The plan is waiting for the Chief Elected Official's approval on March 3, 2020. All voted. Motion carried.

Report: Board Member Attendance Compliance Report

Chair Bryant directed the Executive Committee to the Report. There was some discussion, but no concerns.

**Finance/Audit Committee (David McCraw)**

Recommendation: Approval of Form 990- Return of Organization Exempt from Income Tax

Chair McCraw brought forth a recommendation to Approve Form 990 Return of Organization Exempt from Income Tax. Katrina Lunsford seconded it. There were no questions. All voted. Motion carried.

**Workforce Performance Council (Gary Clark)**

Recommendation: Approval of ITA Provider for Initial Eligibility: Tampa Truck Driving School

Chair Clark brought forth a recommendation to approve the Tampa Truck Driving School as an Eligible Training Provider. Amanda Wilson seconded it. There were no questions. All voted. Motion carried unanimously.

Recommendation: Approval to let RFP for Merchandise/Fuel Cards

Chair Clark brought forth a recommendation to approve staff let an RFP for Merchandise/Fuel Cards. Adil Khan seconded it. There were no questions. All voted. Motion carried unanimously.

**Youth Development Council (Katrina Lunsford)**

Recommendation: Approval to operate a Pilot "Tech Hire Boot Camp Initiative".

Chair Lunsford brought form a recommendation to approve the operation of a Pilot "Tech Hire Boot Camp Initiative". CEO explained this project will provide youth with certifications in the IT field, which will open for job opportunities in the industry with higher wages. Adil Khan seconded it. All voted. Motion carried unanimously.

**CEO Update**

CEO Campbell-Domineck updated Board members of her participation in recent meetings in Tallahassee, the discussion at the state level regarding situations with other boards, policy changes and other situations being handled by the Department of Economic Opportunity and the U.S. Department of Labor.

Meeting adjourned at 12:21 pm

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David McCraw, Treasurer



# BYLAWS

Effective July 1, 2018  
Approved by Full Board on May 18, 2018

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# MISSION

The innovative leader to ensure and sustain a quality workforce for today and the future.

## **ARTICLE I – IDENTIFYING INFORMATION**

### **Section 1 – Name**

The name of the organization shall be the Polk County Workforce Development Board, Inc., doing business as CareerSource Polk, (a not-for-profit corporation), hereinafter the Board.

### **Section 2 – Area of Service**

The area to be served by the Board and all programs under its jurisdiction shall be Polk County, in the State of Florida, which composes Florida Workforce Development Region Seventeen (17) as designated by the Governor of the State of Florida.

### **Section 3 – Location**

The Board shall maintain an office within the geographical confines of Polk County, Florida.

## **ARTICLE II – STATEMENT OF PURPOSE**

The purpose of the Board shall be to:

- A. Provide policy, fiscal and program guidance for all workforce development activities under Federal, State and local initiative as appropriate;
- B. Carry out all other functions as specified in Federal, State or local law or ordinance;
- C. To seek out, apply for and administer other independent grants for the furtherance of the Board's mission.

## **ARTICLE III – MEMBERSHIP**

### **Section 1 – Representation**

The Board's membership shall be generally representative of the population of the service area. The membership shall be based on the diversity of the economic and demographic composition of the county to assure equitable representation.

### **Section 2 – Categories of Membership**

Pursuant to applicable law, the Board shall include members from the following categories:

- A. **Business** – owners of business concerns, chief executive or chief operating officers of non-governmental or other private sector executives who have substantial management or policy responsibility [§107(b)(2A), WIOA. At least one-half of the private sector members, whenever possible, shall be representatives of small business, including minority business. A small business shall be defined as a private, for-profit enterprise employing fewer than 500 people [§107(b)(5), WIOA, §445.007(1) Fla. Stat.]
- B. **Labor/Apprenticeships**
  1. **At least two representatives** who are duly authorized to represent state and/or local labor organizations or appropriate building trade councils of which one shall be from a joint labor management apprenticeship program.
  2. **Education:**
    - a. Superintendent of Polk County Schools or designee (should the Chief Executive recognize time constraints or commitments would impede his/her ability to participate as required).
    - b. President of Polk State College

- c. A representative of a private nonprofit training provider
- d. A representative of a private for-profit training provider
- e. May include representatives of local educational agencies and of community based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment. At a minimum, community-based organization membership may include members representing organizations serving veterans, disabled individuals. [§107(b)(2)(C), WIOA, §445.007(1) Fla. Stat.]

**3. Economic/Community Development and Other Entities**

- a. A representative of economic development and community development entities serving the local area. An economic agency is defined as including a local planning or zoning commission or board, a community development agency, or another local agency or institution responsible for regulating, promoting or assisting in local economic development.

**4. A Representative of Vocational Rehabilitation May include representatives of agencies or entities relating to Transportation, Housing and Urban (HUD) funded employment and public assistance. [§107(b)(2)(D) & (E), § 3(17) WIOA]**

**Section 3 – Number of Members**

- A. The initial number of members, as determined by the Board of County Commissioners, shall be thirty six (36), but in no event shall be fewer than twenty-one (21). The actual number of members at any given time shall not exceed the minimum membership required in Pub. L. 113-128, Title I, Section 107 (b) (2) (A) unless approved by the Governor.
- B. No less than fifty-one percent (51%) of the Board’s membership shall be from the private sector category of membership. However, it is the Board’s intent that the objective for private sector membership representatives be two thirds of total membership.

**Section 4 – Appointment to Board**

The membership of the Board of Directors shall be elected by those present each year at the Spring meeting of the members of the organization and so that approximately one-third shall be elected each year to a three year term. A new board member can be nominated and elected with approval of two-thirds of the board members present. Final appointment must be by the Board of County Commissioners.

- A. All members of the Board must be appointed by the Board of County Commissioners.
- B. Private sector appointments shall be made from among nominees solicited from general purpose business organizations in the county (e.g. Chambers of Commerce, the Central Florida Development Council).
- C. All Labor representatives shall be nominated by local labor federations.
- D. Non-private sector appointments shall be made from among nominees solicited from interested organizations within the county.
- E. The Superintendent of Polk County Public Schools and the President of Polk State College shall have permanent appointment by virtue of their positions.
- F. Appointments to replace members or to fill vacancies shall be made in the same manner as the initial appointments.
- G. Each member of the Board who is not otherwise required to file a full and public disclosure of financial interests pursuant to s. 8, Art. II of the State Constitution or s. 112.3144 shall file a statement of financial interests pursuant to s. 112.3145.

## **Section 5 – Membership Terms**

- A. Members shall be appointed for fixed terms and shall serve until their successors are appointed.
- B. All appointments shall be for three years each.
- C. All non-mandated members whose terms expire must be reappointed by the Board of County Commissioners in order to serve an additional term, except in the case where that member is serving as an officer or chair of a committee and the term for that chairmanship has not expired or as a member who is, as designated in these ByLaws, a permanent member by virtue of their position.
- D. Board members may be reappointed for a maximum of four (4) additional terms. Service not to exceed a total of five terms.

## **Section 6 – Vacancies**

- A. All appointments to fill vacancies must follow the same process as that used to initially fill the appointment. All vacancies shall be filled by the Board of County Commissioners through the same process followed for all appointments.
- B. New members must be appointed to fill the same category of membership as that in which the vacancy occurred. However, new members do not have to be from the same organization or company as the members being replaced.
- C. All appointments for vacancies shall be for the unexpired term of the member being replaced.

Nominations: At least forty five (45) days prior to the date of the end of the fiscal year, all Committees shall propose names of persons as candidates for election to the Board of Directors.

## **Section 7 – Termination of Membership**

- A. Although membership on the Board is strictly voluntary, members are expected to give due consideration to the impact of their presence or absence on the Board before voluntarily terminating their membership. Members are encouraged to give a minimum of thirty (30) days notice of their impending resignation.
- B. Members may be removed from the Board as follows:
  - 1. For Cause – members may be removed for cause by 2/3 vote of the Board’s membership, the Board of County Commissioners or the Governor. The following shall be grounds for removal for cause:
    - a. Disclosure of confidential information
    - b. Misuse of position
    - c. Failure to disclose conflict of interest
    - d. Felony conviction while a member of the Board
    - e. Refusal to perform or gross neglect in performance of Board duties
    - f. Other causes as may be determined by the Board and/or defined by the Governor.
  - 2. Resignations
    - a. Voluntary resignations shall be those occurring when a member, for his or her own reasons, elects to leave Board membership and gives due notice of such intent.
    - b. Involuntary resignations (de-facto resignations) shall occur when a member misses one-half of the regularly scheduled Board or Board Committee/Council meetings in a twelve (12) month period. An involuntary resignation may be set-aside at the request of the member followed by a majority vote of the Board.

## **ARTICLE IV – OFFICERS**

### **Section 1 – Officers**

The Board's officers shall consist of a Chair, Chair-Elect and a Secretary-Treasurer.

## **Section 2 – Eligibility for Office**

- A. CHAIR – the Chair shall only be selected from among the private-sector members of the Board. The Chair must also have a minimum of one year's experience on the Board.
- B. CHAIR ELECT – the Chair Elect shall only be selected from among the private sector members of the Board.
- C. SECRETARY – TREASURER – the Secretary Treasurer shall be selected from among the private sector members of the Board.

## **Section 3 – Election and Terms of Office**

At the Board meeting immediately prior to July 1<sup>st</sup>, officers shall be elected by majority vote of the membership of the Board from the proposed slate of the nominating committee appointed by the Board Chair. Each of the officers shall be from the private sector.

- A. Terms of office for all officers shall be for no more than two years, commencing the 1<sup>st</sup> day of July and concluding the 30<sup>th</sup> day of June of the following year, provided however that officers may serve until their successors are elected.
- B. Officers and Committee/Council Chairs may serve no more than two (2) consecutive terms (years) in any one capacity, although they may continue as Board members.

## **Section 4 – Duties of Officers**

### **A. CHAIR**

- 1. In accordance with the authority normally vested in the Chair of any Board, the Chair shall have the authority and power to preside over all meetings of the Board; to appoint all standing and ad-hoc committees/councils; to generally perform all duties relative to the Office of the Chair; and to sign all applicable reports, letters, or fiscal documents on behalf of the Board.
- 2. The Board's Chair shall also serve as Chair of the Executive Committee and shall be an ex-officio member of all standing and ad-hoc committees/councils.
- 3. The Board Chair shall appoint the Chairs and Co-Chairs for all standing and ad-hoc committees/councils.

### **B. CHAIR-ELECT**

- 1. The Chair-Elect shall, at the request of or in the absence of the Chair, perform all duties of the Chair.
- 2. The Chair-Elect shall assist the Chair in conducting activities of the Board and may serve as the Chair of any standing committee/council or ad-hoc committee.

### **C. SECRETARY-TREASURER**

- 1. The Secretary-Treasurer shall maintain the corporate seal and shall be the custodian of all official Board minutes and records.
- 2. The Secretary-Treasurer shall maintain records and accounts of all Board funds and provide reports of such to the Board.

## **ARTICLE V – BOARD MEETINGS**

### **Section 1 – Meeting Frequency, Day, Time, Place**

The Board shall meet quarterly or as called by the Chair, but in no event shall the Board meet less than three (3) times per year. All meetings will be at times and places as called by the Chair.

## **Section 2 – Notice of Meetings**

A written or electronic notice of each meeting shall be sent to each member of the Board at least five (5) calendar days prior to the scheduled meeting. The notice shall indicate date, time and place of the meeting. All meetings of the Board and its committees/councils shall be open to the public.

## **Section 3 – Quorum**

There shall be a quorum of any meeting of the Board if one-third of the current membership is present and at least 51% of those present are from the private sector. In the absence of a quorum, no official action shall be taken on any item before the Board.

## **Section 4 – Agenda**

- A. All items of business before the Board shall be placed on the agenda by the Executive Committee at least seven (7) days prior to the scheduled Board meeting.
- B. After the Executive Committee finalizes the agenda for any regularly scheduled Board meeting, a copy of the agenda will be electronically transmitted or mailed to each member, along with the meeting notice, at least five (5) calendar days prior to the meeting.
- C. A two-thirds vote of the membership present at any meeting shall be required to waive the order of business as presented in the agenda approved by the Executive Committee or to include additional items for consideration and action by the Board. Items not requiring action by the Board may be added to the agenda with the Chair's (or his or her designee's) consent at any time during a regularly scheduled or called meeting.

## **Section 5 – Order of Business**

The order of business for each Board meeting shall be as specified in the agenda approved by the Executive Committee.

## **Section 6 – Minutes**

- A. Minutes shall be kept of all meetings, which shall be reviewed, amended, corrected as necessary and approved at the next regularly scheduled or called meeting.
- B. Following approval of the Board, minutes shall serve as the official record of the business transacted at the meetings to which they pertain.
- C. Copies of minutes shall be provided to each member of the Board and to the Board of County Commissioners prior to the next scheduled or called meeting of the Board.
- D. Copies of the minutes shall be sent to the Clerk to the Board of County Commissioners
- E. Copies of the minutes shall be provided to the general public upon request.

## **Section 7 – Participation in Meetings**

Participation in meetings shall be limited to members of the Board, the Board's staff and other invited guests and speakers unless or due to:

- A. Agenda items requiring participation from individuals or organizations, or other interested parties having an official or vested interest in an item before the Board.
- B. Agenda items before the Board deemed by the Chair to be relevant, material or of a significant interest to the public to warrant comment or input from any member of the public.

Any unscheduled speakers or individuals other than a Board member or the Board's staff must submit a written request to address the Board to the Chair prior to the meeting being called to order.

## **ARTICLE VI – VOTING RIGHTS**

### **Section 1 – Eligibility and Responsibility**

Each member of the Board shall be eligible to cast one vote, and must vote, on any business of the Board or and standing or ad-hoc committees/councils to which he or she is assigned, unless a conflict of interest, or appearance thereof, exists as outlined in Article VI, Section 2.

### **Section 2 – Conflict of Interest**

- A. No member of the Board shall discuss any matter before the Board or its committees/councils which would financially benefit the member or his or her organization or company. Board members who have a conflict of interest as defined by the relevant statutes must complete the conflict of interest form as prescribed by Florida Law. It is the intention that all Board members comply with all conflict of interest statutes, regulations and guidelines as prescribed by law.
- B. No member of the Board shall make or second a motion or cast a vote on any matter under deliberation by the Board or its committees/councils which has a direct bearing on services to be provided by the member or any business or organization with which the member is affiliated.
- C. No member of the Board shall make or second a motion or cast a vote on any matter before the Board or its committees/councils which would financially benefit the member or his or her business or organization.
- D. CareerSource Polk shall not enter into a contract with one of its own board members, with an organization represented by its own board member or with any entity where a board member has any relationship with the contracting vendor.

However, at the board's discretion, the following may be exempted from the above paragraph:

- 1. A contract with an agency (as defined in s. 112.312(2), including, but not limited to, those statutorily required to be board members) when said agency is represented by a board member and said member does not personally benefit financially from such contracts;
  - 2. A contract with a board member or a vendor (when a board member has any relationship with the contacting vendor) when the contract relates to the member's appointment to the board under Pub. L. No. 113-128, ("Workforce Innovation and Opportunity Act) Title I, Section 107 (b)(2)(A)(vi) ["representatives of the one-stop partners].
  - 3. A contract with a member receiving a grant for workforce services under federal, state or other governmental workforce programs.
  - 4. A contract between a board and a board member which is not exempted under paragraphs II(a), II(b) or II(c) where the board documents exceptional circumstances and/or need and the board member does not personally benefit financially from the contract. Based upon criteria developed by CareerSource Florida, and the Department of Economic Opportunity shall review the board's documentation and assure compliance.
- E. Such contracts, as listed above, may not be executed before or without prior submission to the Department of Economic Opportunity for review and recommendation to CareerSource Florida, Inc.
  - F. A contract under \$25,000 between the Board and a member of the board is not required to have prior approval of CareerSource Florida, Inc., but must be approved by two-thirds vote of the board, a quorum having been established, and must be reported to the Department of Economic Opportunity.
  - G. Board contracts equal to or greater than \$50,000 shall not be executed prior to the written approval of CareerSource Polk's Board.

### **Section 3 – Abstentions**

- A. Any member of the Board with a conflict of interest, or appearance thereof, shall abstain from voting on such matters.
- B. All abstentions due to conflict of interest, or the appearance thereof, shall be publicly acknowledged and recorded in the minutes.

### **Section 4 – Proxy or Alternates**

In keeping with the spirit of the Government in the Sunshine Law, Board members shall not be able to vote at any meetings by proxy, nor shall alternates be permitted to serve or sit as voting members at any meetings.

## **ARTICLE VII – COMMITTEES/COUNCILS**

### **Section 1 – Committee/Councils Names and Responsibilities**

**STANDING COMMITTEES/COUNCILS** – the Board shall have four (4) standing committees/councils: Executive Committee; Youth Development Council; Workforce Performance Council and Finance/Audit Committee. All committees/councils shall have a chair and co-chair appointed by the Board Chair. At least 50% of all committee/council chairs shall be from the private sector.

- A. **Executive Committee** – the Executive Committee shall be composed of the Board Chair; Chair-Elect; the Chair of Each Standing Committee or Council, and the immediate Past Chair of the Board. The Executive Committee is charged with the following responsibilities:
  - 1. Is responsible for and have the authority to act on behalf of the Board, to handle emergency items, to establish Board meeting agendas, to formulate Administrative and Executive policy, to determine the necessity for and priority of all actions taken by the Committees/Councils to be brought before the Board for approval or ratification, and to resolve all administrative and/or policy related problems coming before the Board.
  - 2. When time is of the essence, the Executive Committee shall have the authority to act on behalf of the Board to approve recommendations of other standing committees/councils for commitments of up to \$75,000 per recommendation, where it would be a detriment to the program, as determined by the Executive Committee, to wait for the full Board to meet.
  - 3. Shall have the duty and responsibility to collectively provide supervision to the Board's President & CEO or to authorize the Committee's Chair or Chair-Elect to do so on behalf of the Committee and in accordance with policies adopted by the Board.
  - 4. Shall also have the authority and responsibility to act as the final step of the local level grievance process of the Board.
  - 5. Assists the Board of Directors in its oversight and monitoring the Board's systems of internal controls and risk mitigation, in ensuring compliance with legal and ethical standards and in selecting and hiring of the (internal and) independent auditors.
  - 6. Through interaction with other committees/councils, develops the Board's legislative priorities and takes a leadership role in communicating with key legislators and other decision makers.
  - 7. Monitors national and state legislative developments and provides input as appropriate.
  - 8. Monitors achievement of the goals and objectives of the organization's Strategic Plan.
  - 9. Conducts and/or oversees all activities related to Board human resource policies and marketing.
  - 10. Designs strategies to address its areas of responsibility and monitors the effectiveness of those strategies.
  - 11. It is responsible for new board member recruitment.
  - 12. Identifies Board capacity for resource development and uses such capacity to build revenue.
  - 13. It works with other community partners to solicit grant opportunities as a means of increasing overall workforce development services in Polk County.

14. Seeks out and pursues entrepreneurial opportunities for the Board.

B. **Workforce Performance Council** – The Workforce Performance Council is charged with the following responsibilities:

1. Oversight of the Business Services Division
  - a. Addresses the workforce needs of business and industry.
  - b. Recommends policies and strategies to improve the quality of services offered to employers.
  - c. Recommends policies and strategies to improve both the skill levels of the workforce and the availability of higher skill jobs.
  - d. Reviews labor market information and other pertinent information in the process of devising strategies to address training related to high skills/high wage issues.
  - e. Performs strategic planning functions for the Board, including periodic reviews of performance against objectives; reviews other plans as required by funding entities; and monitors performance of all business competitiveness strategies.
  - f. Reviews and makes recommendations about contract awards for service providers and other training providers.
  - g. It is responsible for preparation and revision at least annually of the 25 top businesses and 25 emerging companies, and of the Targeted Occupations list.
2. Oversight of the Career (One-Stop) Centers
  - a. Addresses the needs of job seekers.
  - b. Provides oversight of One Stop Centers; recommends policies and strategies to improve the quality of jobs filled by the under employed, including researching, addressing and improving the types of training and delivery systems available to incumbent workers.
  - c. It devises strategies to deliver- and then oversees- employer outreach efforts to improve employee recruitment and retention.
  - d. Designs strategies to divert individuals from receipt of public assistance through employment activities.
  - e. Monitors performance of all career council strategies
  - f. Reviews and makes recommendations about contract awards for service providers and other training providers.
3. Other responsibilities
  - a. It is responsible for new board member recruitment.
  - b. Identifies Board capacity for resource development and uses such capacity to build revenue.
  - c. It works with other community partners to solicit grant opportunities as a means of increasing overall workforce development services in Polk County.
  - d. Seeks out and pursues entrepreneurial opportunities for the Board.

C. **Youth Development Council** – The Youth Development Council is charged with the following responsibilities:

1. Ensures representation on the Council that includes a representative from the following:
  - a. Education personnel, employers, and representatives of human service agencies with special interest or expertise in youth policy
  - b. Juvenile justice agency
  - c. Local law enforcement agency
  - d. Local public housing authority
  - e. Parents of eligible youth seeking assistance
  - f. Individuals including former participants and representatives of organizations that have experience relating to youth activities
2. Designs and recommends the delivery of service strategies that address the need to prepare young people and others new to the workforce for employment or transition to additional education beyond high school.
3. Develops the portion of the local plan relating to eligible youth.

4. Recommending eligible providers of youth activities to be awarded grants or contracts on a competitive basis.
  5. Conducting oversight of the eligible providers of youth activities.
  6. Oversees the Board's teenage pregnancy prevention and teen parent initiatives; and it monitors performance of all youth development strategies.
  7. It is responsible for new board member recruitment.
  8. Identifies Board capacity for resource development and uses such capacity to build revenue.
  9. It works with other community partners to solicit grant opportunities as a means of increasing overall workforce development services in Polk County.
  10. Seeks out and pursues entrepreneurial opportunities for the Board.
- F. **Finance/Audit Committee.** The Finance/Audit Committee is charged with the following responsibilities:
1. Oversees development of the budget and ensures accurate tracking/monitoring/accountability for funds. Ensures adequate financial controls and reviews major grants. The Finance Committee Chair is the Board Treasurer-Secretary.
  2. Reviews and approves the Annual Audits
  3. Monitors performance of all Finance/Audit Committee strategies.
  4. It is also responsible for new board member recruitment.
  5. Identifies Board capacity for resource development and uses such capacity to build revenue.
  6. Works with other community partners to solicit grant opportunities as a means of increasing overall workforce development services in Polk County.
  7. Seeks out and pursues entrepreneurial opportunities for the Board.

## **Section 2 – Committee/Council Membership**

- A. All members shall be appointed to committees/councils by the Board Chair.
- B. Each committee/council shall have a Chair and a Co-Chair which shall be appointed by the Board Chair.
- C. Membership on Committees/Councils shall not necessarily be limited to Board members.
- D. The Co-Chair of a committee/council shall act for the Chair on the Executive Committee in his/her absence.
- E. Non-Board members appointed to committees/councils shall have the same voting rights and responsibilities as Board members in the same capacity.
- F. The Board Chair is an ex-officio member of all committees/councils, yet his/her attendance shall not be considered in establishing a quorum.

## **Section 3 – Terms and Membership of Committees/Councils**

- A. Committee Chair and Co-Chair assignments shall be for one term (2 years).
- B. Each Board member shall constantly serve on a Committee/Council for the duration of their membership.
- C. At least 50% of all members of all standing committees/councils shall be from the private sector.
- D. The term of membership for any ad-hoc committee shall be until abolishment of the committee by the Chair.

## **Section 4 – Committee/Council Meetings**

- A. To the extent possible, or as determined necessary by the Board or Committee/Council chair, each standing committee/council shall meet on a regularly scheduled basis in order to carry out the committee's/council's responsibilities.
- B. Each committee/council with current items of business requiring official action by the Board, shall meet sufficiently in advance of the scheduled Board meeting to allow the Executive Committee time to agenda the business items.

### **Section 5 – Committee/Council Quorum**

- A. A committee/council quorum must be established by the Committee/Council Chair at each meeting in order for official business to be conducted.
- B. A committee/council quorum shall consist of the Committee/Council Chair or Co-Chair plus two other members. In the absence of the Committee/Council Chair and Co-Chair, a quorum shall be 2/3 of the appointed committee/council members.
- C. A motion shall be passed or defeated by a majority (50% plus 1) of the members voting at a meeting where a quorum has been established, exclusive of any abstentions.

### **Section 6 – Committee/Council Agendas**

All Committee/Council meetings shall have a written agenda, which will be provided to members in advance of the meeting, if possible, and be made available to the public upon request.

### **Section 7 – Committee/Council Minutes**

- A. Minutes will be recorded and kept of all committee/council meetings, which shall be reviewed, amended or corrected and approved or disapproved at the next scheduled meeting of the committee/council.
- B. Upon approval by the committee/council, the minutes shall serve as the official record of the business conducted at the meeting to which they pertain.
- C. Copies of the minutes shall be provided to each committee/council member prior to their next scheduled meeting. Copies shall be provided to the public upon request.

### **Section 8 – Committee/Council Recommendations and Decisions**

- A. Committee/Council recommendations or decisions will be presented to the Executive Committee by the Committee/Council Chair or his/her designee, for inclusion on the agenda for the next scheduled Board meeting.
- B. Executive Committee or Board approval, disapproval or instructions shall be required before a Committee/Council can continue or take any additional action once referred to the Executive Committee, unless authority to act on behalf of the Board has been specifically given to the Committee/Council by the Board.

### **Section 9 – Committee/Council Interaction and Coordination**

- A. From time to time, various committees/councils will have to interact due to joint or mutual assignments, interests, etc. Such coordination and interaction shall be arranged by the respective chairs of the involved committees/councils. Decisions or recommendations resulting from such coordination will be reported to the Executive Committee by the Chairs of the affected committees/councils.
- B. In the case of conflicting recommendations or decisions between two or more committees/councils, a resolution will be voted on by members of the Board who are not members of the committees/councils involved.
- C. Communication can be received by telephonic, email or any other electronic means subject to and in compliance with the Sunshine Laws.

**ARTICLE VIII – STAFF SUPPORT AND PROFESSIONAL ASSISTANCE**

**Section 1 – Staff Support**

The Board and its committees/councils shall be provided administrative, clerical and technical support by the Board’s staff. It shall be the President & CEO’s responsibility to assure such support is available as necessary or as requested by any Committee/Council Chair.

**Section 2 – Professional Assistance**

If determined necessary, the Board may hire professional consultants, including legal counsel, to assist in carrying out its responsibilities.

**ARTICLE IX – PARLIAMENTARY PROCEDURES**

Board business shall be conducted under Robert’s Rules of Order, for matters that are not specifically covered in these bylaws. The Board Chair shall annually appoint a Parliamentarian, who shall serve as the official interpreter or arbitrator of all matters involving parliamentary procedures or processes. The Board’s Parliamentarian shall serve until removed by two-thirds vote of the Board’s membership.

**ARTICLE X – AMENDMENTS**

These bylaws shall only be amended or repealed by an affirmative vote of two-thirds of the membership voting thereon after written information specifying and summarizing the proposed changes has been given to the entire membership. Such written notice shall be made no less than ten (10) days prior to the meeting at which such amendment or repeal is placed on the agenda.

**ARTICLE XI – RESOLUTION OF DISAGREEMENTS WITH THE BOCC**

In the event of a disagreement between the Board and the Polk County Board of County Commissioners, the Executive Committee shall be empowered to act on behalf of the Board to negotiate the matter to agreement.

**ARTICLE XII – ENACTMENT PROVISION**

These bylaws shall become effective upon approval of the Board. Approval for enactment shall require two-thirds vote of the membership voting thereon, after notice to the membership. Said notice shall be made no later than ten (10) days prior to the meeting at which they are placed on the agenda. These bylaws shall not be construed to take precedence over Federal, State or local laws or regulations or to limit or constrain the rights and obligations of the Board or the Board of County Commissioners as specified in their agreement.

Approved by the Board \_\_\_\_\_  
David Sorg, Chair

May 18, 2018  
Date

**MEMORANDUM OF UNDERSTANDING****CareerSource Polk  
And****AARP Foundation / Senior Community Service Employment Program (SCSEP)****I. PARTIES**

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the **AARP Foundation/SCSEP** ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

**II. PURPOSE**

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The One-stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-stop System.

This MOU is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

**III. PROVISION OF SERVICES**

A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:

1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System.
2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.
4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials



that are available through the One-stop System.

5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Attachment A of this MOU contains the resource sharing for each Partner.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The Polk local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements issued by the State of Florida.
  5. Maintain the statewide "CareerSource Polk" branding of each center.

6. Maintain and operate at least one comprehensive one-stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven one-stop career center.
16. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. ASSURANCES**

##### **A. Monitoring**

CareerSource Polk or its designated staff, officials from the State and Local administrative entities, the U.S. Departments of Labor, Education, and Health and Human Services have the authority to conduct fiscal and programmatic monitoring to ensure that:

- ❖ Federal awards are used for authorized purposes in compliance with law, regulations, and state policies,
- ❖ Those laws, regulations, and policies are enforced properly,
- ❖ Performance data are recorded, tracked, and reviewed for quality to ensure accuracy and completeness,
- ❖ Outcomes are assessed and analyzed periodically to ensure that performance goals are met,
- ❖ Appropriate procedures and internal controls are maintained, and record retention policies are followed, and
- ❖ All MOU terms and conditions are fulfilled.

All parties to this MOU should expect regular fiscal and programmatic monitoring to be conducted by each of the above entities, as appropriate.

## **B. Non-Discrimination and Equal Opportunity**

All parties to this MOU certify that they prohibit, and will continue to prohibit, discrimination, and they certify that no person, otherwise qualified, is denied employment, services or other benefits on the basis of (i) political or religious affiliation, marital status, sexual orientation, gender, gender identification and/or expression, race, color, creed, or national origin; (ii) sex or age, except when age or sex constitutes a bona fide occupational qualification; or (iii) the physical or mental disability of a qualified individual with a disability.

The Parties specifically agree that they will comply with Section 188 of the WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38; Final Rule December 2, 2016), the Americans with Disabilities Act (42 U.S.C. 12101 et seq), the Non-traditional Employment for Women Act of 1991, titles VI and VII of the Civil Rights of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, The Age Discrimination Act of 1967, as amended, title IX of the Education Amendments of 1972, as amended, and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR Part 37 and 38.

## **C. Indemnification**

All Parties to this MOU recognize the Partnership consists of various levels of government, not-for-profit, and for-profit entities. Each party to this agreement shall be responsible for injury to persons or damage to property resulting from negligence on the part of itself, its employees, its agents, or its officers. No Partner assumes any responsibility for any other party, State or non-State for the consequences of any act or omission of any third party. The Parties acknowledge CareerSource Polk and the one-stop operator have no responsibility and/or liability for any actions of the one-stop center employees, agents, and/or assignees. Likewise, the Parties have no responsibility and/or liability for any actions of CareerSource Polk or the one-stop operator.

## **D. Severability**

If any part of this MOU is found to be null and void or is otherwise stricken, the rest of this MOU shall remain in force.

## **E. Drug and Alcohol-free Workplace**

All Parties to this MOU certify they will comply with the Drug-Free Workplace Act of 1988, 41 U.S.C. 702 et seq., and 2 CFR part 182 which require that all organizations receiving grants from any Federal agency maintain a drug-free workplace. The recipient must notify the awarding office if any employee of the recipient is convicted of violating a criminal drug statute. Failure to comply with these requirements may be cause for suspension or debarment under 2 CFR part 180, as adopted by the U.S. Department of Education at 2 CFR 3485, and the U.S. Department of Labor regulations at 29 CFR part 94.

## **F. Certification Regarding Lobbying**

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

**G. Debarment and Suspension**

All parties shall comply with the debarment and suspension requirements (E.O.12549 and 12689) and 2 CFR part 180 and as adopted by the U.S. Department of Labor at 29 CFR part 2998 and by the U.S. Department of Education at 2 CFR 3485.

**H. Priority of Service**

All Parties certify that they will adhere to all statutes, regulations, policies, and plans regarding priority of service, including, but not limited, priority of service for veterans and their eligible spouses, and priority of service for the WIOA title I Adult program, as required by 38 U.S. C. sec. 4215 and its implementing regulations and guidance, and WIOA sec. 134(c)(3)(E) and its implementing regulations and guidance. Partners will target recruitment of special populations that receive a focus for services under WIOA, such as individuals with disabilities, low-income individuals, basic skills deficient youth, and English language learners.

**V. SIGNATURES**

IN WITNESS WHEREOF, Partner and CareerSource Polk have caused this MOU and IFA to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement with this MOU and IFA:

<b>CareerSource Polk:</b>	<b>AARP Foundation / SCSEP (Partner):</b>	<b>Polk County Board of Commission:</b>
 Signature	 Signature	 Signature
<u>Stacy Campbell-Dominick</u> Printed Name	<u>Demetri Antzoulatos</u> Printed Name	<u>R. Todd Dantzler</u> Printed Name
<u>4/2/2018</u> Date	<u>12/28/17</u> Date	<u>4/17/18</u> Date

Q.03





INFRASTRUCTURE AGREEMENT  
ONE-STOP CAREER CENTER SYSTEM  
BY AND BETWEEN CAREERSOURCE POLK  
AND  
AARP Foundation / SCSEP

**I. PARTIES**

This Infrastructure Agreement (“IFA”) is made pursuant to the Workforce Innovation Act of 2014 (“the Act”), and is entered into by [Click or tap here to enter text](#). And CareerSource Polk (“CareerSource”).

The contact information for Partner is as follows:

Name/Title: Sandra Swanson, Project Director

Telephone: 863.499.1290

Email: [sswanson@aarp.org](mailto:sswanson@aarp.org)

**II. PURPOSE**

The Workforce Innovation & Opportunity Act (WIOA) is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its American Job Center (AJC) One-Stop customer delivery system. The AJC One-Stop system assures coordination between the activities authorized in and linked to the Act.

WIOA requires Local Workforce Development Boards (LWDBs) to develop and finalize Infrastructure Funding Agreements (IFA) with all required partners that carry out their programs in the local area.

The purpose of this agreement is to establish a financial plan, including terms and conditions, to fund the services and operating costs of the AJC One-Stop customer delivery system. The Parties to this infrastructure Agreement (IFA) agree that joint funding is a necessary foundation for an integrated service delivery system. The goal of the operating budget is to develop a funding mechanism that:

- a) Establishes and maintains the local workforce delivery system at a level that meets the needs of the job seekers and businesses in the Local area,
- b) Reduces duplication and maximizes program impact through the sharing of services, resources, and technologies among Partners (thereby improving each program’s effectiveness),
- c) Reduces duplication by establishing data sharing as it relates to participant records for outcome information,
- d) Reduces overhead costs for any one partner by streamlining and sharing financial, procurement, and facility costs, and
- e) Ensures that costs are appropriately shared by determining contributions based on the proportionate use of the one-stop centers and relative benefits received, and requiring that all funds are spent solely for allowable purposes in a manner consistent with the applicable authorizing statutes and all other applicable legal requirements, including the Uniform Guidance.

The Partners consider this one-stop operating budget the master budget that is necessary to maintain the high standard One-Stop delivery system. It includes the following cost categories, as required by WIOA and its implementing regulations.

- a) Infrastructure costs (also separately outlined in the Infrastructure Funding Agreement (IFA),
- b) Career Services, and
- c) Shared services

All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis. The one-stop operating budget is transparent and negotiated among Partners on an equitable basis to ensure costs are shared appropriately. All Partners negotiated in good faith and sought to establish outcomes that are reasonable and fair.

### **III. PARTNERS**

Each Partner commits to cross training of staff, as appropriate, and to providing other professional learning opportunities that promote continuous quality improvement. Partners will further promote system integration to the maximum extent feasible through:

- a) Effective communication, information sharing, and collaboration with the one-stop operator,
- b) Joint planning, policy development, and system design processes,
- c) Commitment to the joint goals, strategies, and performance measures,
- d) The use of common and/or linked data management systems and data sharing methods, as appropriate
- e) Leveraging of resources including other public agency and non-profit organization services
- f) Participation in a continuous improvement process designed to boost outcomes and increase customer satisfaction, and
- g) Participation in scheduled Partner meetings to exchange information in support of the above and encourage program and staff integration.

### **IV. ONE-STOP OPERATING BUDGET**

The purpose of this section is to establish a financial plan, including terms and conditions, to fund the services and operating cost of the One-Stop Centers. The local Workforce Development Board based operating costs solely on the infrastructure costs and career services costs included in the following operating budget below.

Below is the overall estimated annual operating budget for the local One-Stop system:  
Comprehensive AJC (CareerSource Polk – Winter Haven)

**Infrastructure (IFA) Budget  
PY2017-2018**

Description	Operating Budget
<b>Infrastructure costs:</b>	
Office Rent/Lease	189,196
Utilities	1,286
Repairs & Maintenance	1,565
Institutional Supplies	402
Telephone	24,366
Furniture/Equipment	21,478
IT Network (software, licenses, & supplies)	44,520
Equipment Rental/Maintenance	9,660
<b>Additional Costs:</b>	
Career Services (Resource Room)	17,850
<b>Total Costs</b>	<b>310,323</b>

**V. COST ALLOCATION METHODOLOGY**

All required Partners have agreed to provide access to their programs in the comprehensive One-Stop Career Center and contribute to the infrastructure costs. Partners will have staff co-located in the Center (on a full or part-time basis) or will provide access via direct linkage as outlined in Attachment B (Partner Representation Schedule) and will fund the infrastructure costs based on a percentage of the partner's annual FTE. (All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis.)

The UI program, as required partner, will not be physically located in the One-Stop Career Center but must contribute to the cost of infrastructure. The UI program and other required partners who have elected not to have staff co-located in the AJC will utilize a "direct linkage" that will allow customers to connect with partner program staff to access services. Cross-trained front-desk and other physically co-located staff can assist in providing information and referrals to the direct-linkage partners. Partners utilizing direct linkage must contribute to the Infrastructure cost equivalent a minimum of 0.2 FTE or 8 hours per week (1 FTE is equivalent to 40 hours/week) or equivalent a minimum of 0.1 FTE or 4 hours per week.

The LWDB selected the cost allocation bases to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners' contributions having to be in proportion to the Partners' use of the AJC and relative benefit received.

As outlined in the MOUI, the costs of the infrastructure of AJC One-Stop Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements.

**VI. PARTNER CONTRIBUTION**

Below is the partner contribution cost determination:

<b>Estimated Cost per FTE</b>	<b>Estimated Infrastructure Costs</b> <b>Total Partner FTE</b> <b>\$310,323/29.7=\$10,448.58</b>
<b>CareerSource Polk FTE Contribution</b> <i>(Partners who elected to have their representatives in the Career Center on a Full or Part time basis to serve customers.)</i>	<i>Partner FTE X Estimated Cost per FTE</i> <b>0.1 FTE X 10,448.58=\$1,044.86</b> <b>(0.1 FTE represents 4 hours a week commitment)</b> <b>0.2 FTE X \$10,448.58=\$2,089.72</b> <b>(0.2 FTE represents 8 hours a week commitment)</b>
<b>Partners Direct Linkage Contribution</b> <i>(Partners who elected not to have their representatives in the Career Center but offer a technology option to serve customers)</i>	Minimum of 0.1 FTE or 4 hours a week Minimum of 0.2 FTE or 8 hours a week Contribution = 0.1 X Estimated Cost per FTE Contribution = 0.2 X Estimated Cost per FTE

**FUNDING TYPES AND SOURCES**

The permissible types of funds used for infrastructure costs and additional cost of operating a local One-Stop delivery system (i.e. partner’s program or administrative funds) may differ depending upon the partners program’s authorizing law and implementing regulations. The funds that may be used also differ based on whether the amount that must be contributed by a partner for infrastructure costs is determined under the Local Funding Model or the State Funding Model. (Copy of the TEG 17-16: Infrastructure Funding of the One-Stop Delivery system can be found at:

[https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)

**Types.** Funding for infrastructure costs and additional costs may be in the form of:

- a) CASH, NON-CASH and THIRD-PARTY IN KIND CONTRIBUTIONS \*\*\*
- b) Funding from philanthropic organizations or other private entities; or
- c) Other alternative financing options (described in WIOA sec. 121(c)(2)(A)(ii) and 20 CFR 678.715, 34 CFR 361.715, and 34 CFR 463.715.

Some partner programs may have statutory or regulatory prohibitions against using certain types of these contribution or on how the program may treat these contributions for fiscal accountability purposes under the respective program’s requirements.

<p>***</p> <p><b>Cash</b> Cash funds provided to the Local WDB or its designee by one-stop Partners, either directly or by an interagency transfer, or by a third party.</p> <p><b>Non-Cash</b></p> <ul style="list-style-type: none"> <li>❖ Expenditures incurred by one-stop Partners on behalf of the one-stop center; and</li> <li>❖ Non-cash contributions or goods or services contributed by a Partner program and used by the One-Stop center.</li> </ul> <p>The value of non-cash and third-party in-kind contributions must be fairly evaluated in accordance with the Uniform Guidance at 2 CFR 200.306.</p>
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### **Third Party In-Kind**

Contributions of space, equipment, technology, non-personnel services, or other like items to support the infrastructure costs associated with one-stop operations, by a non-one-stop Partner to:

- ❖ Support the One-Stop Center in general; or
- ❖ Support the proportionate share of One-Stop infrastructure costs of a specific partner.

**Sources.** The source of funds that may be used to pay for infrastructure costs depends on the requirements regarding use of funds under the law authorizing the partner program that is contributing the funding. The infrastructure funding may be from funds classified as administrative, program, or both, depending on the partner program's requirements.

## **VII. COST RECONCILIATION**

All parties agree that a bi-annual reconciliation of budgeted and actual costs and update of the allocation bases will be provided for the review.

The LWDB will submit invoices to the Partners and send a copy of the updated budget to all Parties. Partners will communicate any disputes with costs in the invoice or the budget to the LWDB in writing. The LWDB will review the disputed cost items and respond accordingly to the Partner. When necessary, the LWDB will revise the invoice and the adjusted budget upon resolution of the dispute.

One-Stop delivery system infrastructure costs are defined as non-personnel costs that are necessary for the general operation of the one-stop career center, including, but not limited to: rental of the facilities; utilities and maintenance; equipment, including assessment-related products and assistive technology for individuals with disabilities; and, technology to facilitate access to the One-Stop delivery system, including technology used for the center's planning and outreach activities. This may also include the costs associated with the development and use of the common identifier (i.e., American Job Center signage) and supplies, as defined in Uniform Guidance at 2 CFR 200.94, to support the general operation of the one-stop career center (WIOA sec. 1221 (h)(4) and 20 CFR 678.700(a), and 34 CFR 446.700(a)).

Non-personnel costs are costs that are not compensation for personnel costs. For example, technology-related services performed by vendors or contractors are non-personnel costs and may be identified as infrastructure costs if they are necessary for the general operation for the one-stop career center. Such costs would include service contracts with vendors or contractors, equipment and supplies.

Personnel services include salaries, wages, and fringe benefits of the employees of partner programs or their subrecipients, as described in 2 CFR 200.430 & 200.431 of the Uniform Guidance. For example, allocable salary and fringe costs of partner program staff who work on information technology systems (e.g., common performance and reporting outcomes) for us4e by the one-stop center as a whole would be personnel costs. The costs of a shared welcome desk or greeter directing employers and customers to the services or staff that are available in that one-stop career center is a personnel expense. These costs, therefore, could not be included in infrastructure costs but are included in "additional costs."

All Parties to this IFA recognize that infrastructure costs are applicable to all required Partners, whether they are physically located in the One-Stop career center or not. Each partner's contributions to these costs, however, may vary, as these contributions are based on the proportionate use and relative benefit received, consistent with the Partner programs authorizing laws and regulations and the Uniform Guidance.

## **VIII. METHODS OF INTERNAL REFERRAL**

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need, to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop delivery system.

The primary principle of the referral system is to provide integrated and seamless delivery of services to workers, job seekers, and employers. In order to facilitate such a system,

Partners agree to:

- a) Familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partners' programs represented in the local American Job Center network;
- b) Develop materials summarizing their program requirements and making them available for Partners and customers;
- c) Provide a paragraph regarding a description of services with website link to organization/entity to be placed on CSP website for ease and consistency of referrals.
- d) Develop and utilize common intake, eligibility determination, assessment, and registration forms;
- e) Provide substantive referrals to customers who are eligible for supplemental and complementary services and benefits under partner programs,
- f) Regularly evaluate ways to improve the referral process, including the use of customer satisfaction surveys,
- g) Commit to robust and ongoing communication required for an effective referral process, and
- h) Commit to actively follow up on the results of referrals and assuring that Partner resources are being leveraged at an optimal level.

## **IX. DATA SHARING**

CareerSource Polk will provide employment services to individuals participating in the partner programs and aggregated information to assist the Partner in its evaluation of the effectiveness of programs as it relates to the employment of students who have participated in partner programs. The Partner will utilize this information for tracking Return on Investment (ROI). All data received will remain confidential and CareerSource Polk will only allow those employees who have a legitimate need to access the information with access to the personally identifiable information provided by the Partner.

Partners agree that the use of high-quality, integrated data is essential to inform decisions made by policymakers, employers, and job seekers. Additionally, it is vital to develop and maintain an integrated case management system, as appropriate, that informs customer service throughout customers' interaction with the integrated system and allows information collected from customers at intake to be captured once.

Partners further agree that the collection, use, and disclosure of customers' personally identifiable information (PII) is subject to various requirements set forth in Federal and State privacy laws. Partners acknowledge that the execution of this MOU, by itself, does not function to satisfy all of these requirements.

All data, including customer PII, collected, used, and disclosed by Partners will be subject to the following:

- a) Customer PII will be properly secured in accordance with the Local WDB's policies and procedures regarding the safeguarding of PII.
- b) The collection, use, and disclosure of customer education records, and the PII contained therein, as defined under FERPA, shall comply with FERPA and applicable State privacy laws.
- c) All confidential data contained in UI wage records must be protected in accordance with the requirements set forth in 20 CFR Part 603.
- d) All personal information contained in VR records must be protected in accordance with the requirements set forth in 34 CFR 361.38.
- e) Customer data may be shared with other programs, for those program's purposes, within the American Job Center network only after the informed written consent of the individual has been obtained, where required.
- f) Customer data will be kept confidential, consistent with Federal and State privacy laws and regulations.
- g) All data exchange activity will be conducted in machine readable format, such as HTML or PDF, for example, and in compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).

All one-stop career center and Partner staff will be trained in the protection, use, and disclosure requirements governing PII and any other confidential data for all applicable programs, including FERPA-protected education records, confidential information in UI records, and personal information in VR records.

#### **X. TERM**

The Term of this IFA shall commence on July 1, 2017j, or the date last executed by both parties, whichever is later, through June 30, 2018, and will automatically renew annually for successive one-year terms, unless otherwise terminated by either party. The parties agree to review this IFA no less than once every three-year period to ensure appropriate funding and delivery of services. This IFA may be terminated for convenience at any time by either party upon thirty (30) days written notice.

#### **XI. AMENDMENTS AND MODIFICATIONS**

Neither this IFA nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this Agreement sent via certified U.S. mail.

#### **XII. MERGER**

This IFA constitutes and expresses the entire and integrated understanding and agreement between the parties hereto, superseding, incorporating and merging all prior understandings, agreements, and discussions relating to the transactions contemplated hereby, and no agreements, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

#### **XIII. THIRD PARTY BENEFICIARY**

The Parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this IFA. None of the Parties intend to directly or substantially benefit a third party by this IFA. The Parties agree that there are no third-party beneficiaries to this IFA and that no third party shall be entitled to assert a claim against any of the Parties based upon this IFA.

#### **XIV. GOVERNANCE**

The accountability and responsibility for the One-Stop career center system's organizational activity and accomplishments will rest with CareerSource Polk. Pursuant to the Act CareerSource shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this IFA will be resolved in accordance with CareerSource Polk's Grievance/Complaint and Hearing/Appeal Procedures.

#### **XV. DISPUTE RESOLUTION**

If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

CareerSource Polk Winter Haven Career Center Partners							
Required Program Partners	Governance	Local Grantee	# of Staff	Total weekly Staff Hours	Total # of FTEs	% of Total FTEs	Partner Contribution
Adult, Dislocated Workers, Youth Formula Grants	DOL	CSP	13	520	13	43.77%	135,831.48
Job Corps*	DOL	Job Corps	1	40	1	3.37%	10,448.58
Wagner Peyser	DOL	CSP	7	280	7	23.57%	73,140.30
Senior Community Employment Service Program	DOL	AARP	1	40	.1	.34%	1,044.86
TAA Program Trade Adjustment Act RESEA	DOL	CSP	0	0	0	.00%	00.00
UC Programs**	DOL	CSP	0	0	0	.00%	00.00
Veteran Program DVOP	DOL	CSP	1	40	1	3.37%	10,448.58
Adult Education GED , Career Tech (Ridge & Travis)	DOE	PCSB	2	32	1	3.37%	10,448.58
Vocational Rehabilitation**	DOE	VR	1	8	.2	.67%	2,089.72
Division of Blind Services***	DOE	Florida Division of Blind Services	1	8	.2	.67%	2,089.72
Welfare Transition	HHS/TAN F	CSP	4	160	4	13.47%	41,794.30
SNAP Employment & Training	HHS	CSP	1	40	1	3.37%	10,448.58
ALPI***	HHS	ALPI	1	8	.2	.67%	2,089.72
<b>Total</b>			<b>34</b>		<b>29.7</b>		<b>310,323.00</b>

- Estimated Infrastructure Budget
  1. Total= \$310,323.00. This amount is required to determine the Costs per FTE.
  
- Infrastructure Contribution (Estimated)
  1. Cost per FTE=IFR Budget Total/Total FTE
  2. Cost per FTE= \$10,448.58
  
- Estimated Partner Infrastructure Contribution
  1. Cost per FTE x Partners total # of FTEs
  
- Direct Linkage Infrastructure Contribution
  1. Direct Linkage is defined as a minimum of 8 hours/ 40 a week (.02 FTE) and 4 hours/40 a week (.01 FTE) of time for access through technology.
  2. Direct Linkage = \$2,089.72 and \$1,044.86

\*Job Corps in contract negotiations; will contribute after January 2018.

\*\* Unemployment Compensation: Direct Linkage; State of Florida DEO will determine contribution level.

\*\*\*Vocational Rehabilitation, Division of Blind Services, ALPI, and AARP: Direct Linkage



careersourcepolk.com

February 25, 2020

CareerSource Florida  
Attention: Workforce Services Plan  
Tallahassee, FL

Dear Sirs:

The CareerSource Polk Four-Year Local Workforce Services Plan 2020-2024 has been approved by the Polk County Board of County Commissioners, designated as the chief elected official of the Local Workforce Development Board - Region 17, and Richard Bryant, Chair of the Polk County Workforce Development Board, Inc.

Should you have any questions related to Workforce Services Plan, please do not hesitate to contact Stacy Campbell-Domineck, President & CEO of Polk County Workforce Development Board, Inc., by phone at (863) 508-1600, x-1133 or via email at [stacy.campbell-domineck@careersourcepolk.com](mailto:stacy.campbell-domineck@careersourcepolk.com).

  
\_\_\_\_\_  
Bill Braswell  
Chief Elected Official  
Polk County Board of County Commissioners



3/3/2020  
Date

  
\_\_\_\_\_  
Richard Bryant, Chair  
Polk County Workforce Development Board, Inc.

2.26.20  
Date

  
\_\_\_\_\_  
Stacy Campbell-Domineck, CEO  
Polk County Workforce Development Board, Inc.

02/26/2020



## MEMORANDUM OF UNDERSTANDING

**CareerSource Polk  
And  
Department Of Education - Division of Blind Services  
SA-008**

### I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the **Department of Education – Division of Blind Services** ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

### II. PURPOSE

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its One-Stop customer service delivery system. The One-Stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-Stop System.

This MOU is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current One-Stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

### III. PROVISION OF SERVICES

A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:

1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-Stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-Stop System.
2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.

4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-Stop System.
  5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the One-Stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Attachment A of this MOU contains the resource sharing for each Partner.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-Stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-Stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-Stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-Stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements

issued by the State of Florida.

5. Maintain the statewide "CareerSource Polk" branding of each center.
6. Maintain and operate at least one comprehensive One-Stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven One-Stop career center.
16. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. ASSURANCES**

##### **A. Monitoring**

CareerSource Polk or its designated staff, officials from the State and Local administrative entities, the U.S. Departments of Labor, Education, and Health and Human Services have the authority to conduct fiscal and programmatic monitoring to ensure that:

- ❖ Federal awards are used for authorized purposes in compliance with law, regulations, and state policies,
- ❖ Those laws, regulations, and policies are enforced properly,
- ❖ Performance data are recorded, tracked, and reviewed for quality to ensure accuracy and completeness,

- ❖ Outcomes are assessed and analyzed periodically to ensure that performance goals are met,
- ❖ Appropriate procedures and internal controls are maintained, and record retention policies are followed, and
- ❖ All MOU terms and conditions are fulfilled.

All parties to this MOU should expect regular fiscal and programmatic monitoring to be conducted by each of the above entities, as appropriate.

#### **B. Non-Discrimination and Equal Opportunity**

All parties to this MOU certify that they prohibit, and will continue to prohibit, discrimination, and they certify that no person, otherwise qualified, is denied employment, services or other benefits on the basis of (i) political or religious affiliation, marital status, sexual orientation, gender, gender identification and/or expression, race, color, creed, or national origin; (ii) sex or age, except when age or sex constitutes a bona fide occupational qualification; or (iii) the physical or mental disability of a qualified individual with a disability.

The Parties specifically agree that they will comply with Section 188 of the WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38; Final Rule December 2, 2016), the Americans with Disabilities Act (42 U.S.C. 12101 et seq), the Non-traditional Employment for Women Act of 1991, titles VI and VII of the Civil Rights of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, The Age Discrimination Act of 1967, as amended, title IX of the Education Amendments of 1972, as amended, and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR Part 37 and 38.

#### **C. Indemnification**

All Parties to this MOU recognize the Partnership consists of various levels of government, not-for-profit, and for-profit entities. Each party to this agreement shall be responsible for injury to persons or damage to property resulting from negligence on the part of itself, its employees, its agents, or its officers. No Partner assumes any responsibility for any other party, State or non-State for the consequences of any act or omission of any third party. The Parties acknowledge CareerSource Polk and the One-Stop operator have no responsibility and/or liability for any actions of the One-Stop center employees, agents, and/or assignees. Likewise, the Parties have no responsibility and/or liability for any actions of CareerSource Polk or the One-Stop Operator.

Nothing in this MOU shall be construed as a waiver of sovereign immunity or serve to expand any Parties liability under section 768.28, Florida Statutes. This section will survive the termination of the MOU.

#### **D. Severability**

If any part of this MOU is found to be null and void or is otherwise stricken, the rest of this MOU shall remain in force.

#### **E. Drug and Alcohol-free Workplace**

All Parties to this MOU certify they will comply with the Drug-Free Workplace Act of 1988, 41 U.S.C. 702 et seq., and 2 CFR part 182 which require that all organizations receiving grants from any Federal agency maintain a drug-free workplace. The recipient must notify the awarding office if any employee of the recipient is convicted of violating a criminal drug

statute. Failure to comply with these requirements may be cause for suspension or debarment under 2 CFR part 180, as adopted by the U.S. Department of Education at 2 CFR 3485, and the U.S. Department of Labor regulations at 29 CFR part 94.

**F. Certification Regarding Lobbying**

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

**G. Debarment and Suspension**

All parties shall comply with the debarment and suspension requirements (E.O.12549 and 12689) and 2 CFR part 180 and as adopted by the U.S. Department of Labor at 29 CFR part 2998 and by the U.S. Department of Education at 2 CFR 3485.

**H. Priority of Service**

All Parties certify that they will adhere to all statutes, regulations, policies, and plans regarding priority of service, including, but not limited, priority of service for veterans and their eligible spouses, and priority of service for the WIOA title I Adult program, as required by 38 U.S. C. sec. 4215 and its implementing regulations and guidance, and WIOA sec. 134(c)(3)(E) and its implementing regulations and guidance. Partners will target recruitment of special populations that receive a focus for services under WIOA, such as individuals with disabilities, low-income individuals, basic skills deficient youth, and English language learners.

**I. Dispute Resolution**

If an issue arises involving this MOU, both parties will make every effort to reach a resolution in a timely and efficient manner. Partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Division of Blind Services, Partner or impose other remedies to resolve the issue.

**V. SIGNATURES**

IN WITNESS WHEREOF, Division of Blind Services and CareerSource Polk have caused this MOU and IFA to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement with this MOU and IFA:

Approved By: CareerSource Polk.

By: *Stacy Campbell-Domneck*  
Authorized Signature

Name: Stacy Campbell-Domneck,  
Typed

Title: CEO  
Typed

Date:

Approved By: Florida Department of Education  
Division of Blind Services:

By: *Robert L. Doyle III*  
Authorized Signature

Name: Robert L. Doyle III,  
Typed

Title: Director of Division of Blind Services:  
Typed

Date: 2/12/2019

Approved By: Polk County Board of  
County Commissioners:

By: *George Lindsey III*  
Authorized Signature

Name: George Lindsey III  
Typed

Title: Commissioner, Chairman  
Typed

Date:

Approved By: Florida Department of Education

By: *Richard Corporan*  
Authorized Signature

Name: Richard Corporan  
Typed

Title: Commissioner of Education  
Typed

Date: 3/15/19 Typed Cheryl Smith





**INFRASTRUCTURE AGREEMENT  
ONE-STOP CAREER CENTER SYSTEM  
BY AND BETWEEN CAREERSOURCE POLK  
AND  
Department of Education – Division of Blind Services  
SA-008**

**I. PARTIES**

This Infrastructure Agreement (“IFA”) is made pursuant to the Workforce Innovation Act of 2014 (“the Act”), and is entered into by **Department of Education – Division of Blind Services** and CareerSource Polk (“CareerSource”).

The contact information for Partner is as follows:

Name/Title: Robert L. Doyle, III / Director

Telephone: 850-245-0331

Email: ROBERT.DOYLE@D5S.FLDOE.ORG

**II. PURPOSE**

The Workforce Innovation & Opportunity Act (WIOA) is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its American Job Center (AJC) One-Stop customer delivery system. The AJC One-Stop system assures coordination between the activities authorized in and linked to the Act.

WIOA requires Local Workforce Development Boards (LWDBs) to develop and finalize Infrastructure Funding Agreements (IFA) with all required partners that carry out their programs in the local area.

The purpose of this agreement is to establish a financial plan, including terms and conditions, to fund the services and operating costs of the AJC One-Stop customer delivery system. The Parties to this infrastructure Agreement (IFA) agree that joint funding is a necessary foundation for an integrated service delivery system. The goal of the operating budget is to develop a funding mechanism that:

- a) Establishes and maintains the local workforce delivery system at a level that meets the needs of the job seekers and businesses in the Local area,
- b) Reduces duplication and maximizes program impact through the sharing of services, resources, and technologies among Partners (thereby improving each program's effectiveness),
- c) Reduces duplication by establishing data sharing as it relates to participant records for outcome information,
- d) Reduces overhead costs for any one partner by streamlining and sharing financial, procurement, and facility costs, and
- e) Ensures that costs are appropriately shared by determining contributions based on the proportionate use of the one-stop centers and relative benefits received, and requiring that all funds are spent solely for allowable purposes in a manner consistent with the applicable authorizing statutes and all other applicable legal requirements, including the Uniform Guidance.

The Partners consider this one-stop operating budget the master budget that is necessary to maintain the high standard One-Stop delivery system. It includes the following cost categories, as required by WIOA and its implementing regulations.

- a) Infrastructure costs (also separately outlined in the Infrastructure Funding Agreement (IFA),
- b) Career Services, and
- c) Shared services

All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis. The one-stop operating budget is transparent and negotiated among Partners on an equitable basis to ensure costs are shared appropriately. All Partners negotiated in good faith and sought to establish outcomes that are reasonable and fair.

### III. PARTNERS

Each Partner commits to cross training of staff, as appropriate, and to providing other professional learning opportunities that promote continuous quality improvement. Partners will further promote system integration to the maximum extent feasible through:

- a) Effective communication, information sharing, and collaboration with the one-stop operator,
- b) Joint planning, policy development, and system design processes,
- c) Commitment to the joint goals, strategies, and performance measures,
- d) The use of common and/or linked data management systems and data sharing methods, as appropriate
- e) Leveraging of resources including other public agency and non-profit organization services
- f) Participation in a continuous improvement process designed to boost outcomes and increase customer satisfaction, and
- g) Participation in scheduled Partner meetings to exchange information in support of the above and encourage program and staff integration.

### IV. ONE-STOP OPERATING BUDGET

The purpose of this section is to establish a financial plan, including terms and conditions, to fund the services and operating cost of the One-Stop Centers. The local Workforce Development Board based operating costs solely on the infrastructure costs and career services costs included in the following operating budget below.

Below is the overall estimated annual operating budget for the local One-Stop system:  
Comprehensive AJC (CareerSource Polk – Winter Haven)

**Infrastructure (IFA) Budget  
PY2019-2020**

Description	Operating Budget
<b>Infrastructure costs:</b>	
Office Rent/Lease	189,196
Utilities	1,286
Repairs & Maintenance	1,565
Institutional Supplies	402
Telephone	24,366
Furniture/Equipment	21,478
IT Network (software, licenses, & supplies)	44,520
Equipment Rental/Maintenance	9,660
<b>Additional Costs:</b>	
Career Services (Resource Room)	17,850
<b>Total Costs</b>	<b>310,323</b>

**V. COST ALLOCATION METHODOLOGY**

All required Partners have agreed to provide access to their programs in the comprehensive One-Stop Career Center and contribute to the infrastructure costs. Partners will have staff co-located in the Center (on a full or part-time basis) or will provide access via direct linkage as outlined in Attachment B (Partner Representation Schedule) and will fund the infrastructure costs based on a percentage of the partner's annual FTE. (All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis.)

The UI program, as required partner, will not be physically located in the One-Stop Career Center but must contribute to the cost of infrastructure. The UI program and other required partners who have elected not to have staff co-located in the AJC will utilize a "direct linkage" that will allow customers to connect with partner program staff to access services. Cross-trained front-desk and other physically co-located staff can assist in providing information and referrals to the direct-linkage partners. Partners utilizing direct linkage must contribute to the Infrastructure cost equivalent a minimum of 0.2 FTE or 8 hours per week (1 FTE is equivalent to 40 hours/week) or equivalent a minimum of 0.1 FTE or 4 hours per week.

The LWDB selected the cost allocation bases to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners' contributions having to be in proportion to the Partners' use of the AJC and relative benefit received.

As outlined in the MOU, the costs of the infrastructure of AJC One-Stop Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements.

## VI. PARTNER CONTRIBUTION

Below is the partner contribution cost determination:

Estimated Cost per FTE	Estimated Infrastructure Costs Total Partner FTE \$310,323/29.7=\$10,448.58
<b>CareerSource Polk FTE Contribution</b> (Partners who elected to have their representatives in the Career Center on a Full or Part time basis to serve customers.)	Partner FTE X Estimated Cost per FTE 0.1 FTE X 10,448.58=\$1,044.86 (0.1 FTE represents 4 hours a week commitment) 0.2 FTE X \$10,448.58=\$2,069.72 (0.2 FTE represents 8 hours a week commitment)
<b>Partners Direct Linkage Contribution</b> (Partners who elected not to have their representatives in the Career Center but offer a technology option to serve customers)	Minimum of 0.1 FTE or 4 hours a week Minimum of 0.2 FTE or 8 hours a week Contribution = 0.1 X Estimated Cost per FTE Contribution = 0.2 X Estimated Cost per FTE

### FUNDING TYPES AND SOURCES

The permissible types of funds used for infrastructure costs and additional cost of operating a local One-Stop delivery system (i.e. partner's program or administrative funds) may differ depending upon the partner's program's authorizing law and implementing regulations. The funds that may be used also differ based on whether the amount that must be contributed by a partner for infrastructure costs is determined under the Local Funding Model or the State Funding Model. (Copy of the TEGL 17-16: Infrastructure Funding of the One-Stop Delivery system can be found at:

[https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)

**Types.** Funding for infrastructure costs and additional costs may be in the form of:

- a) CASH, NON-CASH and THIRD-PARTY IN KIND CONTRIBUTIONS \*\*\*
- b) Funding from philanthropic organizations or other private entities; or
- c) Other alternative financing options (described in WIOA sec. 121(c)(2)(A)(ii) and 20 CFR 678.715, 34 CFR 361.715, and 34 CFR 463.715.

Some partner programs may have statutory or regulatory prohibitions against using certain types of these contributions or on how the program may treat these contributions for fiscal accountability purposes under the respective program's requirements.

\*\*\*

#### Cash

Cash funds provided to the Local WDB or its designee by one-stop Partners, either directly or by an interagency transfer, or by a third party.

#### Non-Cash

- ❖ Expenditures incurred by one-stop Partners on behalf of the one-stop center; and
- ❖ Non-cash contributions or goods or services contributed by a Partner program and used by the One-Stop center.

The value of non-cash and third-party in-kind contributions must be fairly evaluated in accordance with the Uniform Guidance at 2 CFR 200.306.

### **Third Party In-Kind**

Contributions of space, equipment, technology, non-personnel services, or other like items to support the infrastructure costs associated with one-stop operations, by a non-one-stop Partner to:

- ❖ Support the One-Stop Center in general; or
- ❖ Support the proportionate share of One-Stop infrastructure costs of a specific partner.

**Sources.** The source of funds that may be used to pay for infrastructure costs depends on the requirements regarding use of funds under the law authorizing the partner program that is contributing the funding. The infrastructure funding may be from funds classified as administrative, program, or both, depending on the partner program's requirements.

## **VII. COST RECONCILIATION**

All parties agree that a bi-annual reconciliation of budgeted and actual costs and update of the allocation bases will be provided for the review.

The LWDB will submit invoices to the Partners and send a copy of the updated budget to all Parties. Partners will communicate any disputes with costs in the invoice or the budget to the LWDB in writing. The LWDB will review the disputed cost items and respond accordingly to the Partner. When necessary, the LWDB will revise the invoice and the adjusted budget upon resolution of the dispute.

One-Stop delivery system infrastructure costs are defined as non-personnel costs that are necessary for the general operation of the one-stop career center, including, but not limited to: rental of the facilities; utilities and maintenance; equipment, including assessment-related products and assistive technology for individuals with disabilities; and, technology to facilitate access to the One-Stop delivery system, including technology used for the center's planning and outreach activities. This may also include the costs associated with the development and use of the common identifier (i.e., American Job Center signage) and supplies, as defined in Uniform Guidance at 2 CFR 200.94, to support the general operation of the one-stop career center (WIOA sec. 1221 (h)(4) and 20 CFR 678.700(a), and 34 CFR 446.700(a)).

Non-personnel costs are costs that are not compensation for personnel costs. For example, technology-related services performed by vendors or contractors are non-personnel costs and may be identified as infrastructure costs if they are necessary for the general operation for the one-stop career center. Such costs would include service contracts with vendors or contractors, equipment and supplies.

Personnel services include salaries, wages, and fringe benefits of the employees of partner programs or their sub-recipients, as described in 2 CFR 200.430 & 200.431 of the Uniform Guidance. For example, allocable salary and fringe costs of partner program staff who work on information technology systems (e.g., common performance and reporting outcomes) for us4e by the one-stop center as a whole would be personnel costs. The costs of a shared welcome desk or greeter directing employers and customers to the services or staff that are available in that one-stop career center is a personnel expense. These costs, therefore, could not be included in infrastructure costs but are included in "additional costs."

All Parties to this IFA recognize that infrastructure costs are applicable to all required Partners, whether they are physically located in the One-Stop career center or not. Each partner's contributions to these costs, however, may vary, as these contributions are based on the proportionate use and relative benefit received, consistent with the Partner programs authorizing laws and regulations and the Uniform Guidance.

## VIII. METHODS OF INTERNAL REFERRAL

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need, to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop delivery system.

The primary principle of the referral system is to provide integrated and seamless delivery of services to workers, job seekers, and employers. In order to facilitate such a system,

Partners agree to:

- a) Familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partners' programs represented in the local American Job Center network;
- b) Develop materials summarizing their program requirements and making them available for Partners and customers;
- c) Provide a paragraph regarding a description of services with website link to organization/entity to be placed on CSP website for ease and consistency of referrals.
- d) Develop and utilize common intake, eligibility determination, assessment, and registration forms;
- e) Provide substantive referrals to customers who are eligible for supplemental and complementary services and benefits under partner programs,
- f) Regularly evaluate ways to improve the referral process, including the use of customer satisfaction surveys,
- g) Commit to robust and ongoing communication required for an effective referral process, and
- h) Commit to actively follow up on the results of referrals and assuring that Partner resources are being leveraged at an optimal level.

## IX. DATA SHARING

CareerSource Polk will provide employment services to individuals participating in the partner programs and aggregated information to assist the Partner in its evaluation of the effectiveness of programs as it relates to the employment of students who have participated in partner programs. The Partner will utilize this information for tracking Return on Investment (ROI). All data received will remain confidential and CareerSource Polk will only allow those employees who have a legitimate need to access the information with access to the personally identifiable information provided by the Partner.

Partners agree that the use of high-quality, integrated data is essential to inform decisions made by policymakers, employers, and job seekers. Additionally, it is vital to develop and maintain an integrated case management system, as appropriate, that informs customer service throughout customers' interaction with the integrated system and allows information collected from customers at intake to be captured once.

Partners further agree that the collection, use, and disclosure of customers' personally identifiable information (PII) is subject to various requirements set forth in Federal and State privacy laws. Partners acknowledge that the execution of this MOU, by itself, does not function to satisfy all of these requirements.

All data, including customer PII, collected, used, and disclosed by Partners will be subject to the following:

- a) Customer PII will be properly secured in accordance with the Local WDB's policies and procedures regarding the safeguarding of PII.
- b) The collection, use, and disclosure of customer education records, and the PII contained therein, as defined under FERPA, shall comply with FERPA and applicable State privacy laws.
- c) All confidential data contained in UI wage records must be protected in accordance with the requirements set forth in 20 CFR Part 603.
- d) All personal information contained in VR records must be protected in accordance with the requirements set forth in 34 CFR 361.38.
- e) Customer data may be shared with other programs, for those program's purposes, within the American Job Center network only after the informed written consent of the individual has been obtained, where required.
- f) Customer data will be kept confidential, consistent with Federal and State privacy laws and regulations.
- g) All data exchange activity will be conducted in machine readable format, such as HTML or PDF, for example, and in compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).

All one-stop career center and Partner staff will be trained in the protection, use, and disclosure requirements governing PII and any other confidential data for all applicable programs, including FERPA-protected education records, confidential information in UI records, and personal information in VR records.

#### **X. TERM**

The Term of this IFA shall commence upon execution, through June 30, 2020. The parties agree to review this IFA no less than once every three-year period to ensure appropriate funding and delivery of services. This IFA may be terminated for convenience at any time by either party upon thirty (30) days written notice.

#### **XI. AMENDMENTS AND MODIFICATIONS**

Neither this IFA nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this Agreement sent via certified U.S. mail.

#### **XII. MERGER**

This IFA constitutes and expresses the entire and integrated understanding and agreement between the parties hereto, superseding, incorporating and merging all prior understandings, agreements, and discussions relating to the transactions contemplated hereby, and no agreements, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

#### **XIII. THIRD PARTY BENEFICIARY**

The Parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this IFA. None of the Parties intend to

directly or substantially benefit a third party by this IFA. The Parties agree that there are no third-party beneficiaries to this IFA and that no third party shall be entitled to assert a claim against any of the Parties based upon this IFA.

#### **XIV. GOVERNANCE**

The accountability and responsibility for the One-Stop career center system's organizational activity and accomplishments will rest with CareerSource Polk. Pursuant to the Act CareerSource shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this IFA will be resolved in accordance with CareerSource Polk's Grievance/Complaint and Hearing/Appeal Procedures.

#### **XV. DISPUTE AND IMPASSE RESOLUTION**

All Parties will actively participate in local IFA negotiations in a good faith effort to reach an agreement. Any disputes shall first be attempted to be resolved informally. Should informal resolution efforts fail, then the following Dispute Resolution process must be followed.

1. If an issue arises involving this MOU, both parties will make every effort to reach a resolution in a timely and efficient manner. Partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.
2. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.
3. If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Division of Blind Services, Partner or impose other remedies to resolve the issue.

If Partners in a local area have employed the dispute resolution process and have failed to reach consensus on an issue pertaining to the IFA, then an impasse is declared and the State Funding Mechanism (SFM) is triggered and the IFA will be appealed through the process established by the governor of this process.

#### **XVI. DISPUTE RESOLUTION**

If an issue arises involving this MOU, both parties will make every effort to reach a resolution in a timely and efficient manner. Partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Division of Blind Services, Partner or impose other remedies to resolve the issue.

If Partners in a local area have employed the dispute resolution process and have failed to reach consensus on an issue pertaining to the IFA will be appealed through the process established by the governor of this process.

## Career/Source Role Winter Haven Career Center Partners

Required Program Partners	Governance	Local Grantee	# of Staff	Total weekly Staff Hours	Total # of FTEs	% of Total FTEs	Partner Contribution
Adult, Dislocated Workers, Youth Formula Grants Job Corps*	DOL	CSP	13	520	13	43.77%	135,831.48
Wagner Peyser	DOL	Job Corps	1	40	1	3.37%	10,448.58
Senior Community Employment Service Program	DOL	CSP	7	280	7	23.57%	73,140.30
TAA Program	DOL	AARP	1	40	.1	.34%	1,044.86
Trade Adjustment Act RESEA	DOL	CSP	0	0	0	.00%	00.00
UC Programs**	DOL	CSP	1	40	1	3.37%	10,448.58
Veteran Program DVOP	DOL	CSP	0	0	0	.00%	00.00
Adult Education GED, Career Tech (Ridge & Travis)	DOE	CSP	1	40	1	3.37%	10,448.58
Vocational Rehabilitation**	DOE	PCSB	2	32	1	3.37%	10,448.58
Division of Blind Services***	DOE	VR	1	8	.2	.67%	2,089.72
Welfare Transition	DOE	Florida Division of Blind Services	1	4	.1	.34%	1,044.86
SNAP	HHS/TANF	CSP	4	160	4	13.47%	41,794.30
Employment & Training ALPI***	HHS	CSP	1	40	1	3.37%	10,448.58
	HHS	ALPI	1	8	.2	.67%	2,089.72
Total			34		29.7		310,323.00

- Estimated Infrastructure Budget
  1. Total= \$310,323.00. This amount is required to determine the Costs per FTE.
- Infrastructure Contribution (Estimated)
  1. Cost per FTE=IFR Budget Total/Total FTE
  2. Cost per FTE= \$10,448.58
- Estimated Partner Infrastructure Contribution
  1. Cost per FTE x Partners total # of FTEs
- Direct Linkage Infrastructure Contribution
  1. Direct Linkage is defined as a minimum of 8 hours/ 40 a week (.02 FTE) and 4 hours/40 a week (.01 FTE) of time for access through technology.
  2. Direct Linkage = \$2,089.72 and \$1,044.86

\*Job Corps in contract negotiations; will contribute after January 2018.

\*\* Unemployment Compensation: Direct Linkage; State of Florida DEO will determine contribution level.

\*\*\*Vocational Rehabilitation, Division of Blind Services, ALPI, and AARP: Direct Linkage

September 17, 2019 Board of County Commissioners Regular Meeting  
Agenda Item #56

*P.  
Consent / County Atty*

**SUBJECT**

Approve Memorandum of Understanding by and between CareerSource Polk and Florida Department of Education Division of Blind Services for coordination of resources and ensure effective and efficient delivery of the One-Stop Customer Service Delivery System.

**DESCRIPTION**

The proposed Memorandum of Understanding (MOU) is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk, and the Florida Department of Education Division of Blind Services and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-Stop System.

**RECOMMENDATION**

Approve the Memorandum of Understanding.

**FISCAL IMPACT**

There is no fiscal impact.

**CONTACT INFORMATION**

Michael Craig, County Attorney 863-534-6482

Luz M. Heredia, Vice President of Operations, Career Source Polk 863-508-1600,  
x1111

*9/17/19*

*Attached are 3 sets of the MOU for Chairman's signature.  
Keep one fully signed set and return 2 signed sets  
to me for forwarding to Luz of Career Source Polk.*

*Thank you,  
Diana*

*9/24/19 Luz to pick up the two  
originals. DM*



careersourcepolk.com

**MEMORANDUM OF UNDERSTANDING & INFRASTRUCTURE FUNDING AGREEMENT  
MOU # IA-878**

**CareerSource Polk  
And**

**Florida Department of Education - Division of Vocational Rehabilitation**

**I. PARTIES**

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the **Florida Department of Education – Division of Vocational Rehabilitation** ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

**II. PURPOSE**

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The One-stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-stop System.

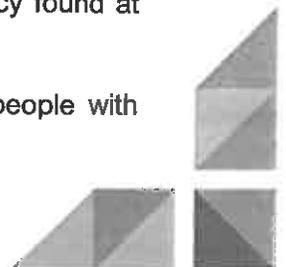
This MOU replaces DOE/DVR MOU #IA-755 and is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

**III. PROVISION OF SERVICES**

A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:

1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System.
2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.



4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Attachment A of this MOU contains the resource sharing for each Partner.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The Polk local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements issued by

the State of Florida.

5. Maintain the statewide "CareerSource Polk" branding of each center.
6. Maintain and operate at least one comprehensive one-stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven one-stop career center.
16. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. ASSURANCES**

##### **A. Monitoring**

CareerSource Polk or its designated staff, officials from the State and Local administrative entities, the U.S. Departments of Labor, Education, and Health and Human Services have the authority to conduct fiscal and programmatic monitoring to ensure that:

- ❖ Federal awards are used for authorized purposes in compliance with law, regulations, and state policies,
- ❖ Those laws, regulations, and policies are enforced properly,
- ❖ Performance data are recorded, tracked, and reviewed for quality to ensure accuracy and completeness,

- ❖ Outcomes are assessed and analyzed periodically to ensure that performance goals are met,
- ❖ Appropriate procedures and internal controls are maintained, and record retention policies are followed, and
- ❖ All MOU terms and conditions are fulfilled.

All parties to this MOU should expect regular fiscal and programmatic monitoring to be conducted by each of the above entities, as appropriate.

#### **B. Non-Discrimination and Equal Opportunity**

All parties to this MOU certify that they prohibit, and will continue to prohibit, discrimination, and they certify that no person, otherwise qualified, is denied employment, services or other benefits on the basis of (i) political or religious affiliation, marital status, sexual orientation, gender, gender identification and/or expression, race, color, creed, or national origin; (ii) sex or age, except when age or sex constitutes a bona fide occupational qualification; or (iii) the physical or mental disability of a qualified individual with a disability.

The Parties specifically agree that they will comply with Section 188 of the WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38; Final Rule December 2, 2016), the Americans with Disabilities Act (42 U.S.C. 12101 et seq), the Non-traditional Employment for Women Act of 1991, titles VI and VII of the Civil Rights of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, The Age Discrimination Act of 1967, as amended, title IX of the Education Amendments of 1972, as amended, and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR Part 37 and 38.

#### **C. Indemnification**

All Parties to this MOU recognize the Partnership consists of various levels of government, not-for-profit, and for-profit entities. Each party to this agreement shall be responsible for injury to persons or damage to property resulting from negligence on the part of itself, its employees, its agents, or its officers. No Partner assumes any responsibility for any other party, State or non-State for the consequences of any act or omission of any third party. The Parties acknowledge CareerSource Polk and the one-stop operator have no responsibility and/or liability for any actions of the one-stop center employees, agents, and/or assignees. Likewise, the Parties have no responsibility and/or liability for any actions of CareerSource Polk or the one-stop operator.

Nothing in this MOU shall be construed as a waiver of sovereign immunity or serve to expand any Parties liability under section 768.28, Florida Statutes. This section will survive the termination of the MOU.

#### **D. Severability**

If any part of this MOU is found to be null and void or is otherwise stricken, the rest of this MOU shall remain in force.

#### **E. Drug and Alcohol-free Workplace**

All Parties to this MOU certify they will comply with the Drug-Free Workplace Act of 1988, 41 U.S.C. 702 et seq., and 2 CFR part 182 which require that all organizations receiving grants from any Federal agency maintain a drug-free workplace. The recipient must notify the awarding office if any employee of the recipient is convicted of violating a criminal drug statute.

Failure to comply with these requirements may be cause for suspension or debarment under 2 CFR part 180, as adopted by the U.S. Department of Education at 2 CFR 3485, and the U.S. Department of Labor regulations at 29 CFR part 94.

**F. Certification Regarding Lobbying**

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

**G. Debarment and Suspension**

All parties shall comply with the debarment and suspension requirements (E.O.12549 and 12689) and 2 CFR part 180 and as adopted by the U.S. Department of Labor at 29 CFR part 2998 and by the U.S. Department of Education at 2 CFR 3485.

**H. Priority of Service**

All Parties certify that they will adhere to all applicable statutes, regulations, policies, and plans regarding priority of service, including, but not limited, priority of service for veterans and their eligible spouses, and priority of service for the WIOA title I Adult program, as required by 38 U.S. C. sec. 4215 and its implementing regulations and guidance, and WIOA sec. 134(c)(3)(E) and its implementing regulations and guidance. Partners will target recruitment of special populations that receive a focus for services under WIOA, such as individuals with disabilities, low-income individuals, basic skills deficient youth, and English language learners.

**V. TERM**

The Term of this MOU/IFA shall commence on date of final signatory through June 30, 2020, and may be renewed annually for successive one-year terms, upon written concurrence between both parties. The parties agree to review this MOU/IFA no less than once every three-year period to ensure appropriate funding and delivery of services. This MOU/IFA may be terminated for convenience at any time by either party upon thirty (30) days written notice.

**REMAINDER OF PAGE INTENTIONALLY LEFT BLANK**

**VI. SIGNATURES**

IN WITNESS WHEREOF, Partner and CareerSource Polk have caused this fifteen (15) page MOU and IFA to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement with this MOU and IFA:

**CareerSource Polk:**

*Stacy Campbell-Domineck*  
\_\_\_\_\_  
Signature

**Stacy Campbell-Domineck**  
\_\_\_\_\_  
Printed Name

*8/28/18*  
\_\_\_\_\_  
Date

**Florida Department of Education  
(Partner):**

*Allison Flanagan*  
\_\_\_\_\_  
Signature

**Allison Flanagan, Director**  
\_\_\_\_\_  
Printed Name

*8/24/18*  
\_\_\_\_\_  
Date

**Polk County Board of Commission:**

*R. Todd Dantzler*  
\_\_\_\_\_  
Signature

**R. Todd Dantzler**  
\_\_\_\_\_  
Printed Name

*9-18-18*  
\_\_\_\_\_  
Date

*P.67*





INFRASTRUCTURE AGREEMENT  
ONE-STOP CAREER CENTER SYSTEM  
BY AND BETWEEN CAREERSOURCE POLK  
AND

Florida Department of Education – Division of Vocational Rehabilitation

**I. PARTIES**

This Infrastructure Agreement (“IFA”) is made pursuant to the Workforce Innovation Act of 2014 (“the Act”), and is entered into by **Florida Department of Education – Division of Vocational Rehabilitation** and CareerSource Polk (“CareerSource”).

The contact information for Partner is as follows:

Name/Title: Wayne Olson / VR Area Director

Telephone: (407) 893-5657

Email: Wayne.Olson@vr.fldoe.org

**II. PURPOSE**

The Workforce Innovation & Opportunity Act (WIOA) is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its American Job Center (AJC) One-Stop customer delivery system. The AJC One-Stop system assures coordination between the activities authorized in and linked to the Act.

WIOA requires Local Workforce Development Boards (LWDBs) to develop and finalize Infrastructure Funding Agreements (IFA) with all required partners that carry out their programs in the local area.

The purpose of this agreement is to establish a financial plan, including terms and conditions, to fund the services and operating costs of the AJC One-Stop customer delivery system. The Parties to this infrastructure Agreement (IFA) agree that joint funding is a necessary foundation for an integrated service delivery system. The goal of the operating budget is to develop a funding mechanism that:

- a) Establishes and maintains the local workforce delivery system at a level that meets the needs of the job seekers and businesses in the Local area,
- b) Reduces duplication and maximizes program impact through the sharing of services, resources, and technologies among Partners (thereby improving each program's effectiveness),
- c) Reduces duplication by establishing data sharing as it relates to participant records for outcome information,
- d) Reduces overhead costs for any one partner by streamlining and sharing financial, procurement, and facility costs, and
- e) Ensures that costs are appropriately shared by determining contributions based on the proportionate use of the one-stop centers and relative benefits received, and requiring that all funds are spent solely for allowable purposes in a manner consistent with the applicable authorizing **statutes** and all other applicable legal requirements, including the Uniform Guidance.

The Partners consider this one-stop operating budget the master budget that is necessary to maintain the high standard One-Stop delivery system. It includes the following cost categories, as required by WIOA and its implementing regulations.

- a) Infrastructure costs (also separately outlined in the Infrastructure Funding Agreement (IFA),
- b) Career Services, and
- c) Shared services

All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis. The one-stop operating budget is transparent and negotiated among Partners on an equitable basis to ensure costs are shared appropriately. All Partners negotiated in good faith and sought to establish outcomes that are reasonable and fair.

### **III. PARTNERS**

Each Partner commits to cross training of staff, as appropriate, and to providing other professional learning opportunities that promote continuous quality improvement. Partners will further promote system integration to the maximum extent feasible through:

- a) Effective communication, information sharing, and collaboration with the one-stop operator,
- b) Joint planning, policy development, and system design processes,
- c) Commitment to the joint goals, strategies, and performance measures,
- d) The use of common and/or linked data management systems and data sharing methods, as appropriate
- e) Leveraging of resources including other public agency and non-profit organization services
- f) Participation in a continuous improvement process designed to boost outcomes and increase customer satisfaction, and
- g) Participation in scheduled Partner meetings to exchange information in support of the above and encourage program and staff integration.

### **IV. ONE-STOP OPERATING BUDGET**

The purpose of this section is to establish a financial plan, including terms and conditions, to fund the services and operating cost of the One-Stop Centers. The local Workforce Development Board based operating costs solely on the infrastructure costs and career services costs included in the following operating budget below.

Below is the overall estimated annual operating budget for the local One-Stop system:  
Comprehensive AJC (CareerSource Polk – Winter Haven)

**Infrastructure (IFA) Budget  
PY2017-2018**

Description	Operating Budget
<b>Infrastructure costs:</b>	
Office Rent/Lease	189,196
Utilities	1,286
Repairs & Maintenance	1,565
Institutional Supplies	402
Telephone	24,366
Furniture/Equipment	21,478
IT Network (software, licenses, & supplies)	44,520
Equipment Rental/Maintenance	9,660
<b>Additional Costs:</b>	
Career Services (Resource Room)	17,850
<b>Total Costs</b>	<b>310,323</b>

**V. COST ALLOCATION METHODOLOGY**

All required Partners have agreed to provide access to their programs in the comprehensive One-Stop Career Center and contribute to the infrastructure costs. Partners will have staff co-located in the Center (on a full or part-time basis) or will provide access via direct linkage as outlined in Attachment B (Partner Representation Schedule) and will fund the infrastructure costs based on a percentage of the partner's annual FTE. (All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis.)

The UI program, as required partner, will not be physically located in the One-Stop Career Center but must contribute to the cost of infrastructure. The UI program and other required partners who have elected not to have staff co-located in the AJC will utilize a "direct linkage" that will allow customers to connect with partner program staff to access services. Cross-trained front-desk and other physically co-located staff can assist in providing information and referrals to the direct-linkage partners. Partners utilizing direct linkage must contribute to the Infrastructure cost equivalent a minimum of 0.2 FTE or 8 hours per week (1 FTE is equivalent to 40 hours/week) or equivalent a minimum of 0.1 FTE or 4 hours per week.

The LWDB selected the cost allocation bases to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners' contributions having to be in proportion to the Partners' use of the AJC and relative benefit received.

As outlined in the MOUI, the costs of the infrastructure of AJC One-Stop Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements.

## VI. PARTNER CONTRIBUTION

Below is the partner contribution cost determination:

Estimated Cost per FTE	Estimated Infrastructure Costs Total Partner FTE \$310,323/29.7=\$10,448.58
<b>CareerSource Polk FTE Contribution</b> <i>(Partners who elected to have their representatives in the Career Center on a Full or Part time basis to serve customers.)</i>	<i>Partner FTE X Estimated Cost per FTE</i> <b>0.1 FTE X 10,448.58=\$1,044.86</b> <b>(0.1 FTE represents 4 hours a week commitment)</b> <b>0.2 FTE X \$10,448.58=\$2,089.72</b> <b>(0.2 FTE represents 8 hours a week commitment)</b>
<b>Partners Direct Linkage Contribution</b> <i>(Partners who elected not to have their representatives in the Career Center but offer a technology option to serve customers)</i>	Minimum of 0.1 FTE or 4 hours a week Minimum of 0.2 FTE or 8 hours a week Contribution = 0.1 X Estimated Cost per FTE Contribution = 0.2 X Estimated Cost per FTE

The Division of Vocational Rehabilitation is responsible for a direct linkage contribution in the amount of \$2,089.72 annually.

### FUNDING TYPES AND SOURCES

The permissible types of funds used for infrastructure costs and additional cost of operating a local One-Stop delivery system (i.e. partner's program or administrative funds) may differ depending upon the partners program's authorizing law and implementing regulations. The funds that may be used also differ based on whether the amount that must be contributed by a partner for infrastructure costs is determined under the Local Funding Model or the State Funding Model. (Copy of the TEGL 17-16: Infrastructure Funding of the One-Stop Delivery system can be found at: [https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968))

**Types.** Funding for infrastructure costs and additional costs may be in the form of:

- a) CASH, NON-CASH and THIRD-PARTY IN KIND CONTRIBUTIONS \*\*\*
- b) Funding from philanthropic organizations or other private entities; or
- c) Other alternative financing options (described in WIOA sec. 121(c)(2)(A)(ii) and 20 CFR 678.715, 34 CFR 361.715, and 34 CFR 463.715.

Some partner programs may have statutory or regulatory prohibitions against using certain types of these contribution or on how the program may treat these contributions for fiscal accountability purposes under the respective program's requirements.

\*\*\*

#### Cash

Cash funds provided to the Local WDB or its designee by one-stop Partners, either directly or by an interagency transfer, or by a third party.

#### Non-Cash

- ❖ Expenditures incurred by one-stop Partners on behalf of the one-stop center; and
- ❖ Non-cash contributions or goods or services contributed by a Partner program and used by the One-Stop center.

The value of non-cash and third-party in-kind contributions must be fairly evaluated in accordance with the Uniform Guidance at 2 CFR 200.306.

#### **Third Party In-Kind**

Contributions of space, equipment, technology, non-personnel services, or other like items to support the infrastructure costs associated with one-stop operations, by a non-one-stop Partner to:

- ❖ Support the One-Stop Center in general; or
- ❖ Support the proportionate share of One-Stop infrastructure costs of a specific partner.

**Sources.** The source of funds that may be used to pay for infrastructure costs depends on the requirements regarding use of funds under the law authorizing the partner program that is contributing the funding. The infrastructure funding may be from funds classified as administrative, program, or both, depending on the partner program's requirements.

### **VII. COST RECONCILIATION**

All parties agree that a bi-annual reconciliation of budgeted and actual costs and update of the allocation bases will be provided for the review.

The LWDB will submit invoices to the Partners and send a copy of the updated budget to all Parties. Partners will communicate any disputes with costs in the invoice or the budget to the LWDB in writing. The LWDB will review the disputed cost items and respond accordingly to the Partner. When necessary, the LWDB will revise the invoice and the adjusted budget upon resolution of the dispute.

One-Stop delivery system infrastructure costs are defined as non-personnel costs that are necessary for the general operation of the one-stop career center, including, but not limited to: rental of the facilities; utilities and maintenance; equipment, including assessment-related products and assistive technology for individuals with disabilities; and, technology to facilitate access to the One-Stop delivery system, including technology used for the center's planning and outreach activities. This may also include the costs associated with the development and use of the common identifier (i.e., American Job Center signage) and supplies, as defined in Uniform Guidance at 2 CFR 200.94, to support the general operation of the one-stop career center (WIOA sec. 1221 (h)(4) and 20 CFR 678.700(a), and 34 CFR 446.700(a)).

Non-personnel costs are costs that are not compensation for personnel costs. For example, technology-related services performed by vendors or contractors are non-personnel costs and may be identified as infrastructure costs if they are necessary for the general operation for the one-stop career center. Such costs would include service contracts with vendors or contractors, equipment and supplies.

Personnel services include salaries, wages, and fringe benefits of the employees of partner programs or their subrecipients, as described in 2 CFR 200.430 & 200.431 of the Uniform Guidance. For example, allocable salary and fringe costs of partner program staff who work on information technology systems (e.g., common performance and reporting outcomes) for us4e by the one-stop center as a whole would be personnel costs. The costs of a shared welcome desk or greeter directing employers and customers to the services or staff that are available in that one-stop career center is a personnel expense. These costs, therefore, could not be included in infrastructure costs but are included in "additional costs."

All Parties to this IFA recognize that infrastructure costs are applicable to all required Partners, whether they are physically located in the One-Stop career center or not. Each partner's contributions to these costs, however, may vary, as these contributions are based on the

proportionate use and relative benefit received, consistent with the Partner programs authorizing laws and regulations and the Uniform Guidance.

#### **VIII. STEPS USED TO REACH CONSENSUS**

The Partners and CareerSource conferred regarding the involvement of each partner at the CareerSource Centers. The appropriate allocation bases were discussed and those bases included in this IFA were agreed upon as the most appropriate. CareerSource proposed the initial Partner Contribution Amounts as described above and the Partners concurred with their proposal. Finally, the parties discussed the best mechanisms by which to review and reconcile actual expenses in the future and agreed to the term included in the Cost Reconciliation section above.

#### **IX. METHODS OF INTERNAL REFERRAL**

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need, to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop delivery system.

The primary principle of the referral system is to provide integrated and seamless delivery of services to workers, job seekers, and employers. In order to facilitate such a system,

Partners agree to:

- a) Familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partners' programs represented in the local American Job Center network;
- b) Develop materials summarizing their program requirements and making them available for Partners and customers;
- c) Provide a paragraph regarding a description of services with website link to organization/entity to be placed on CSP website for ease and consistency of referrals.
- d) Develop and utilize common intake, eligibility determination, assessment, and registration forms;
- e) Provide substantive referrals to customers who are eligible for supplemental and complementary services and benefits under partner programs,
- f) Regularly evaluate ways to improve the referral process, including the use of customer satisfaction surveys,
- g) Commit to robust and ongoing communication required for an effective referral process, and
- h) Commit to actively follow up on the results of referrals and assuring that Partner resources are being leveraged at an optimal level.

#### **X. AMENDMENTS AND MODIFICATIONS**

Neither this IFA nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this Agreement sent via certified U.S. mail.

#### **XI. MERGER**

This IFA constitutes and expresses the entire and integrated understanding and agreement between the parties hereto, superseding, incorporating and merging all prior understandings, agreements, and discussions relating to the transactions contemplated hereby, and no agreements, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

## **XII. THIRD PARTY BENEFICIARY**

The Parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this IFA. None of the Parties intend to directly or substantially benefit a third party by this IFA. The Parties agree that there are no third-party beneficiaries to this IFA and that no third party shall be entitled to assert a claim against any of the Parties based upon this IFA.

## **XIII. DISPUTE RESOLUTION**

All Parties will actively participate in local IFA negotiations in a good faith effort to reach agreement. Any disputes shall first be attempted to be resolved informally. Should informal resolution efforts fail, then the following Dispute Resolution process must be followed.

1. If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.
2. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.
3. If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

If Partners in a local area have employed the dispute resolution process and have failed to reach consensus on an issue pertaining to the IFA, then an impasse is declared and the State Funding Mechanism (SFM) is triggered and the IFA will be appealed through the process established by the governor for this purpose.

## **XIV. PAYMENT METHODOLOGY**

Career Source shall submit to the Partners quarterly invoices such that the Partners will have covered all costs agreed to in this IFA by the end of the program year, June 30 annually. The Parties to this IFA intend to be bound by this agreement and agree to make payment of all such funds as indicated in Section VI. Upon receipt of the above described invoices, the Partners shall process payment within 30 days.

CareerSource Polk Winter Haven Career Center Partners							
Required Program Partners	Governance	Local Grantee	# of Staff	Total weekly Staff Hours	Total # of FTEs	% of Total FTEs	Partner Contribution
Adult, Dislocated Workers, Youth Formula Grants	DOL	CSP	13	520	13	43.77%	135,831.48
Job Corps*	DOL	Job Corps	1	40	1	3.37%	10,448.58
Wagner Peyser	DOL	CSP	7	280	7	23.57%	73,140.30
Senior Community Employment Service Program	DOL	AARP	1	40	1	3.37%	1,044.86
TAA Program Trade Adjustment Act	DOL	CSP	0	0	0	0.00%	00.00
RESEA	DOL	CSP	1	40	1	3.37%	10,448.58
UC Programs**	DOL	CSP	0	0	0	0.00%	00.00
Veteran Program DVOP	DOL	CSP	1	40	1	3.37%	10,448.58
Adult Education GED, Career Tech (Ridge & Travis)	DOE	PCSB	2	32	1	3.37%	10,448.58
Vocational Rehabilitation**	DOE	VR	1	8	2	6.74%	2,089.72
Division of Blind Services***	DOE	Florida Division of Blind Services	1	8	2	6.74%	2,089.72
Welfare Transition	HHS/TANF	CSP	4	160	4	13.47%	41,794.30
SNAP Employment & Training	HHS	CSP	1	40	1	3.37%	10,448.58
ALPI***	HHS	ALPI	1	8	2	6.74%	2,089.72
<b>Total</b>			<b>34</b>		<b>29.7</b>		<b>310,323.00</b>

- Estimated Infrastructure Budget
  1. Total= \$310,323.00. This amount is required to determine the Costs per FTE.
- Infrastructure Contribution (Estimated)
  1. Cost per FTE=IFR Budget Total/Total FTE
  2. Cost per FTE= \$10,448.58
- Estimated Partner Infrastructure Contribution
  1. Cost per FTE x Partners total # of FTEs
- Direct Linkage Infrastructure Contribution
  1. Direct Linkage is defined as a minimum of 8 hours/ 40 a week (.02 FTE) and 4 hours/40 a week (.01 FTE) of time for access through technology.
  2. Direct Linkage = \$2,089.72 and \$1,044.86

\*Job Corps in contract negotiations; will contribute after January 2018.

\*\* Unemployment Compensation: Direct Linkage; State of Florida DEO will determine contribution level.

\*\*\*Vocational Rehabilitation, Division of Blind Services, ALPI, and AARP: Direct Linkage



## MEMORANDUM OF UNDERSTANDING

### CareerSource Polk (CSP) And Lakeland Housing Authority (LHA)

#### I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to Rehabilitation Act of 1973, 29 U.S.C. §721(a)(11) and the Workforce Innovation and Opportunity Act of 2014 (WIOA), and is entered into by the **Lakeland Housing Authority** ("Partner") and Polk County Workforce Development Board, Inc. d/b/a/ CareerSource Polk (hereafter referred to as "CareerSource Polk").

#### II. PURPOSE

The Workforce Innovation and Opportunity Act of 2014 is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its one-stop customer service delivery system. The One-stop System assures coordination between the activities authorized in and linked to this Act. The purpose of this MOU is to describe the cooperative workforce training, employment and economic development efforts of CareerSource Polk and the Partner and the actions to be taken by each to assure the coordination of their efforts in accordance with state issued requirements in order to establish and maintain an effective and successful One-stop System.

This MOU is intended to coordinate resources and to prevent duplication and ensure the effective and efficient delivery of workforce services in Polk County. In addition, this MOU will establish joint processes and procedures that will enable the Partner to integrate with the current one-stop service delivery system resulting in a seamless and comprehensive array of education, human service, job training, and other workforce development services to persons with disabilities within Polk County.

The parties to this document agree to coordinate and perform the activities and services described herein within the scope of legislative requirements governing the parties' respective programs, services, and agencies.

#### III. PROVISION OF SERVICES

- A. The Partner agrees to participate with CareerSource Polk career centers and perform the following functions:
  1. Coordinate with CareerSource Polk to provide access to its workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System.
  2. Inform CareerSource Polk Program Manager of any conflicts and/or grievances, who shall consult with the CareerSource Polk management and appropriate supervisors in the resolution of such conflicts and grievances as needed. If not resolved at the local level, formal grievances may be filed using the CareerSource Polk grievance policy found at [www.careersourcepolk.com](http://www.careersourcepolk.com)
  3. Partner will adhere to policies of non-discrimination and accessibility for people with disabilities.
  4. Coordinate with CareerSource Polk to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are



addressed in providing access to services, including access to technology and materials that are available through the One-stop System.

5. Coordinate with CareerSource Polk for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any infrastructure funding mechanism requirements issued by the State of Florida.
  6. Attachment A of this MOU contains the resource sharing for each Partner.
  7. Provide all logistical support necessary for its staff located within the local area to be fully integrated within the One-stop System.
  8. Provide CareerSource Polk with monthly outcome numbers for performance data tracking.
  9. Provide feedback to CareerSource Polk management regarding the performance of the partnership, including its effectiveness and success.
  10. Participate in career center periodic meetings to provide updates on the Partners' programs and procedures to CareerSource Polk staff.
- B. The Polk local area workforce board and the Polk County Board of County Commissioners have designated CareerSource Polk to act as the administrative entity, grant recipient and fiscal agent for this area. CareerSource Polk will perform the following functions:
1. Review this MOU annually and solicit feedback from the Partner regarding improvements, changes, and/or additions.
  2. Coordinate with the Partner to provide access to workforce services and programs through the One-stop System in accordance with published policies and procedures, which include the manner in which the services will be coordinated and delivered through the One-stop System. Workforce services and programs include, but are not limited to, the allowable activities described in the WIOA and related legislation for: WIOA adult, dislocated worker and youth programs; Wagner-Peyser; Unemployment Insurance (UI); Veterans programs; Trade Adjustment Assistance (TAA); Temporary Assistance for Needy Families (TANF) program; adult education and family literacy; Perkins Act programs; and Vocational Rehabilitation.
  3. Coordinate with the Partner to ensure that the needs of job seekers, youth, and individuals with barriers to employment, including individuals with disabilities, are addressed in providing access to services, including access to technology and materials that are available through the One-stop System.
  4. Coordinate with the Partner for the funding of the infrastructure costs of the one-stop career centers and the funding of shared services and operating costs in accordance with 29 U.S.C § 3151 and any state infrastructure funding mechanism requirements issued by the State of Florida.

5. Maintain the statewide "CareerSource Polk" branding of each center.
6. Maintain and operate at least one comprehensive one-stop career center within the local workforce development area that shall be open to the public from 7:30 am until 5:00 pm, Monday through Thursday, and 9:00 am through 12:30 on Fridays (excluding recognized holidays and emergencies.)
7. Provide an area for the Partner's meetings and/or co-location as space permits.
8. Model CareerSource Polk core values and maintain a professional working environment.
9. Abide by all of its policies, rules, and procedures and applicable Florida statutes and rules.
10. Implementing a continuous quality improvement program.
11. Leading Partner meetings in strategic planning for career center activities and staff team meetings.
12. Planning and conducting facility safety drills for fire, tornado, hurricane evacuation situations, etc. to include the provision to all occupants with information about facility safety issues.
13. Facilitating the development and enforcement of dress standards through the career center Partner management team.
14. Scheduling and managing the use of common areas in each facility.
15. CareerSource Polk provides facility space for GED classes at the Winter Haven one-stop career center.
16. CareerSource Polk will provide a presence of at least one representative at YouthBuild advisory board meetings.
17. CareerSource Polk will participate in YouthBuild Career & Education fairs, whenever possible.
18. CareerSource Polk will provide Partner with client referrals and will complete, maintain, manage and track services in Employ Florida and client's case file.
19. The duly authorized agent of the recipient agrees to satisfy the requirements of 34 CFR 361.505 and 34 CFR 361.720.

#### **IV. ASSURANCES**

##### **A. Monitoring**

CareerSource Polk or its designated staff, officials from the State and Local administrative entities, the U.S. Departments of Labor, Education, and Health and Human Services have the authority to conduct fiscal and programmatic monitoring to ensure that:

- ❖ Federal awards are used for authorized purposes in compliance with law, regulations, and state policies,
- ❖ Those laws, regulations, and policies are enforced properly,
- ❖ Performance data are recorded, tracked, and reviewed for quality to ensure accuracy and completeness,
- ❖ Outcomes are assessed and analyzed periodically to ensure that performance goals are met,
- ❖ Appropriate procedures and internal controls are maintained, and record retention policies are followed, and
- ❖ All MOU terms and conditions are fulfilled.

All parties to this MOU should expect regular fiscal and programmatic monitoring to be conducted by each of the above entities, as appropriate.

#### **B. Non-Discrimination and Equal Opportunity**

All parties to this MOU certify that they prohibit, and will continue to prohibit, discrimination, and they certify that no person, otherwise qualified, is denied employment, services or other benefits on the basis of (i) political or religious affiliation, marital status, sexual orientation, gender, gender identification and/or expression, race, color, creed, or national origin; (ii) sex or age, except when age or sex constitutes a bona fide occupational qualification; or (iii) the physical or mental disability of a qualified individual with a disability.

The Parties specifically agree that they will comply with Section 188 of the WIOA Nondiscrimination and Equal Opportunity Regulations (29 CFR Part 38; Final Rule December 2, 2016), the Americans with Disabilities Act (42 U.S.C. 12101 et seq), the Non-traditional Employment for Women Act of 1991, titles VI and VII of the Civil Rights of 1964, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, The Age Discrimination Act of 1967, as amended, title IX of the Education Amendments of 1972, as amended, and with all applicable requirements imposed by or pursuant to regulations implementing those laws, including but not limited to 29 CFR Part 37 and 38.

#### **C. Indemnification**

All Parties to this MOU recognize the Partnership consists of various levels of government, not-for-profit, and for-profit entities. Each party to this agreement shall be responsible for injury to persons or damage to property resulting from negligence on the part of itself, its employees, its agents, or its officers. No Partner assumes any responsibility for any other party, State or non-State for the consequences of any act or omission of any third party. The Parties acknowledge CareerSource Polk and the one-stop operator have no responsibility and/or liability for any actions of the one-stop center employees, agents, and/or assignees. Likewise, the Parties have no responsibility and/or liability for any actions of CareerSource Polk or the one-stop operator.

#### **D. Severability**

If any part of this MOU is found to be null and void or is otherwise stricken, the rest of this MOU shall remain in force.

#### **E. Drug and Alcohol-free Workplace**

All Parties to this MOU certify they will comply with the Drug-Free Workplace Act of 1988, 41 U.S.C. 702 et seq., and 2 CFR part 182 which require that all organizations receiving grants from any Federal agency maintain a drug-free workplace. The recipient must notify the awarding office if any employee of the recipient is convicted of violating a criminal drug statute. Failure to comply with these requirements may be cause for suspension or debarment under 2 CFR part 180, as adopted by the U.S. Department of Education at 2 CFR 3485, and the U.S. Department of Labor regulations at 29 CFR part 94.

**F. Certification Regarding Lobbying**

All parties shall comply with the Byrd Anti-Lobbying Amendment (31 U.S.C. Section 1352), 29 C.F.R. Part 93, and 34 CFR part 82, as well as the requirements in the Uniform Guidance at 2 CFR 200.450. The Parties shall not lobby federal entities using federal funds and will disclose lobbying activities as required by law and regulations.

**G. Debarment and Suspension**

All parties shall comply with the debarment and suspension requirements (E.O.12549 and 12689) and 2 CFR part 180 and as adopted by the U.S. Department of Labor at 29 CFR part 2998 and by the U.S. Department of Education at 2 CFR 3485.

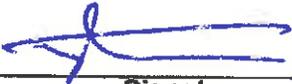
**H. Priority of Service**

All Parties certify that they will adhere to all statutes, regulations, policies, and plans regarding priority of service, including, but not limited, priority of service for veterans and their eligible spouses, and priority of service for the WIOA title I Adult program, as required by 38 U.S. C. sec. 4215 and its implementing regulations and guidance, and WIOA sec. 134(c)(3)(E) and its implementing regulations and guidance. Partners will target recruitment of special populations that receive a focus for services under WIOA, such as individuals with disabilities, low-income individuals, basic skills deficient youth, and English language learners.

**V. SIGNATURES**

IN WITNESS WHEREOF, Partner and CareerSource Polk have caused this MOU and IFA to be executed by their undersigned officials as duly authorized.

By the signatures affixed below, the parties specify their agreement with this MOU and IFA:

<b>CareerSource Polk:</b>	<b>Lakeland Housing Authority:</b>	<b>Polk County Board of Commission:</b>
 Signature	 Signature	 Signature
<u>Stacy Campbell-Domineck</u> Printed Name	<u>Benjamin Stevenson</u> Printed Name	<u>George M. Lindsey III</u> Printed Name
<u>03/01/2019</u> Date	<u>3/13/2019</u> Date	<u>4/16/19</u> Date

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INFRASTRUCTURE AGREEMENT  
ONE-STOP CAREER CENTER SYSTEM  
BY AND BETWEEN CAREERSOURCE POLK  
AND  
LAKELAND HOUSING AUTHORITY

**I. PARTIES**

This Infrastructure Agreement (“IFA”) is made pursuant to the Workforce Innovation Act of 2014 (“the Act”), and is entered into by **Lakeland Housing Authority** and CareerSource Polk (“CareerSource”).

The contact information for Partner is as follows:

Name/Title: Ben Stevenson, Executive Director

Telephone:

Email: bstevenson@lakelandhousing.org

**II. PURPOSE**

The Workforce Innovation & Opportunity Act (WIOA) is an affirmation of the work that has been done in Florida to build the workforce development system. The cornerstone of the Act is its American Job Center (AJC) One-Stop customer delivery system. The AJC One-Stop system assures coordination between the activities authorized in and linked to the Act.

WIOA requires Local Workforce Development Boards (LWDBs) to develop and finalize Infrastructure Funding Agreements (IFA) with all required partners that carry out their programs in the local area.

The purpose of this agreement is to establish a financial plan, including terms and conditions, to fund the services and operating costs of the AJC One-Stop customer delivery system. The Parties to this infrastructure Agreement (IFA) agree that joint funding is a necessary foundation for an integrated service delivery system. The goal of the operating budget is to develop a funding mechanism that:

- a) Establishes and maintains the local workforce delivery system at a level that meets the needs of the job seekers and businesses in the Local area,
- b) Reduces duplication and maximizes program impact through the sharing of services, resources, and technologies among Partners (thereby improving each program’s effectiveness),
- c) Reduces duplication by establishing data sharing as it relates to participant records for outcome information,
- d) Reduces overhead costs for any one partner by streamlining and sharing financial, procurement, and facility costs, and
- e) Ensures that costs are appropriately shared by determining contributions based on the proportionate use of the one-stop centers and relative benefits received, and requiring that all funds are spent solely for allowable purposes in a manner consistent with the applicable authorizing statutes and all other applicable legal requirements, including the Uniform Guidance.

The Partners consider this one-stop operating budget the master budget that is necessary to maintain the high standard One-Stop delivery system. It includes the following cost categories, as required by WIOA and its implementing regulations.

- a) Infrastructure costs (also separately outlined in the Infrastructure Funding Agreement (IFA),
- b) Career Services, and
- c) Shared services

All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis. The one-stop operating budget is transparent and negotiated among Partners on an equitable basis to ensure costs are shared appropriately. All Partners negotiated in good faith and sought to establish outcomes that are reasonable and fair.

### **III. PARTNERS**

Each Partner commits to cross training of staff, as appropriate, and to providing other professional learning opportunities that promote continuous quality improvement. Partners will further promote system integration to the maximum extent feasible through:

- a) Effective communication, information sharing, and collaboration with the one-stop operator,
- b) Joint planning, policy development, and system design processes,
- c) Commitment to the joint goals, strategies, and performance measures,
- d) The use of common and/or linked data management systems and data sharing methods, as appropriate
- e) Leveraging of resources including other public agency and non-profit organization services
- f) Participation in a continuous improvement process designed to boost outcomes and increase customer satisfaction, and
- g) Participation in scheduled Partner meetings to exchange information in support of the above and encourage program and staff integration.

### **IV. ONE-STOP OPERATING BUDGET**

The purpose of this section is to establish a financial plan, including terms and conditions, to fund the services and operating cost of the One-Stop Centers. The local Workforce Development Board based operating costs solely on the infrastructure costs and career services costs included in the following operating budget below.

Below is the overall estimated annual operating budget for the local One-Stop system:  
Comprehensive AJC (CareerSource Polk – Winter Haven)

**Attachment A  
Infrastructure (IFA) Budget  
PY2018-2019**

Description	Operating Budgeted Costs Year	Operating Budgeted Costs Quarter
<b>Infrastructure Costs:</b>		
Office Rent/Lease	189,196	47,299
Utilities	1,304	326
Repairs & Maintenance	5,829	1,457
Institutional Supplies	376	94
Telephone	30,681	7,670
Furniture/Equipment	1,533	383
IT Network (software, licenses, & supplies)	71,721	17,930
Equipment Rental/Maintenance	14,999	3,750
<b>Additional Costs:</b>		
Career Services (Resource Room)	17,850	4,463
<b>Total Costs</b>	<b>333,489</b>	<b>83,372</b>

**V. COST ALLOCATION METHODOLOGY**

All required Partners have agreed to provide access to their programs in the comprehensive One-Stop Career Center and contribute to the infrastructure costs. Partners will have staff co-located in the Center (on a full or part-time basis) or will provide access via direct linkage as outlined in Attachment B (Partner Representation Schedule) and will fund the infrastructure costs based on a percentage of the partner's annual FTE. (All costs included in the IFA, allocated according to Partner's proportionate use and relative benefits received, and will be reconciled on a quarterly basis.)

The UI program, as required partner, will not be physically located in the One-Stop Career Center but must contribute to the cost of infrastructure. The UI program and other required partners who have elected not to have staff co-located in the AJC will utilize a "direct linkage" that will allow customers to connect with partner program staff to access services. Cross-trained front-desk and other physically co-located staff can assist in providing information and referrals to the direct-linkage partners. Partners utilizing direct linkage must contribute to the Infrastructure cost equivalent a minimum of 0.2 FTE or 8 hours per week (1 FTE is equivalent to 40 hours/week) or equivalent a minimum of 0.1 FTE or 4 hours per week.

The LWDB selected the cost allocation bases to determine overall Partner contributions. This was done in an effort:

- a) To remedy the imbalance of non-physically represented Partners, and
- b) To comply with the requirement of Partners' contributions having to be in proportion to the Partners' use of the AJC and relative benefit received.

As outlined in the MOUI, the costs of the infrastructure of AJC One-Stop Center will be funded in accordance with the requirements of the Workforce Innovation and Opportunity Act; federal cost principles; and all other applicable legal requirements.

**VI. PARTNER CONTRIBUTION**

Below is the partner contribution cost determination:

<b>Estimated Cost per FTE</b>	<b>Estimated Infrastructure Costs</b> <b>Total Partner FTE</b> <b>\$333,489 / 35.6=9,371.04</b>
<b>CareerSource Polk FTE Contribution</b> <i>(Partners who elected to have their representatives in the Career Center on a Full or Part time basis to serve customers.)</i>	<i>Partner FTE X Estimated Cost per FTE</i> <b>0.2 FTE X 9,371.04 = 1,867.54</b> <b>(0.2 FTE represents 8 hours a week commitment)</b>
<b>CareerSource Polk FTE Contribution</b> <i>(Partners who elected to have their representatives in the Career Center on a Part time basis to serve customers.)</i>	<i>Partner FTE X Estimated Cost per FTE</i> <b>0.1 FTE X 9,371.04=933.77</b> <b>(0.1 FTE represents 4 hours a week commitment)</b>
<b>Partners Direct Linkage Contribution</b> <i>(Partners who elected not to have their representatives in the Career Center but offer a technology option to serve customers)</i>	Minimum of 0.2 FTE or 8 hours a week Contribution = 0.2 X Estimated Cost per FTE Minimum of 0.1 FTE or 4 hours a week Contribution = 0.1 X Estimated Cost per FTE

**FUNDING TYPES AND SOURCES**

The permissible types of funds used for infrastructure costs and additional cost of operating a local One-Stop delivery system (i.e. partner’s program or administrative funds) may differ depending upon the partners program’s authorizing law and implementing regulations. The funds that may be used also differ based on whether the amount that must be contributed by a partner for infrastructure costs is determined under the Local Funding Model or the State Funding Model. (Copy of the TEGL 17-16: Infrastructure Funding of the One-Stop Delivery system can be found at:

[https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)

**Types.** Funding for infrastructure costs and additional costs may be in the form of:

- a) CASH, NON-CASH and THIRD-PARTY IN KIND CONTRIBUTIONS \*\*\*
- b) Funding from philanthropic organizations or other private entities; or
- c) Other alternative financing options (described in WIOA sec. 121(c)(2)(A)(ii) and 20 CFR 678.715, 34 CFR 361.715, and 34 CFR 463.715.

Some partner programs may have statutory or regulatory prohibitions against using certain types of these contribution or on how the program may treat these contributions for fiscal accountability purposes under the respective program’s requirements.

\*\*\*

**Cash**

Cash funds provided to the Local WDB or its designee by one-stop Partners, either directly or by an interagency transfer, or by a third party.

**Non-Cash**

- ❖ Expenditures incurred by one-stop Partners on behalf of the one-stop center; and
- ❖ Non-cash contributions or goods or services contributed by a Partner program and used by the One-Stop center.

The value of non-cash and third-party in-kind contributions must be fairly evaluated in accordance with the Uniform Guidance at 2 CFR 200.306.

### **Third Party In-Kind**

Contributions of space, equipment, technology, non-personnel services, or other like items to support the infrastructure costs associated with one-stop operations, by a non-one-stop Partner to:

- ❖ Support the One-Stop Center in general; or
- ❖ Support the proportionate share of One-Stop infrastructure costs of a specific partner.

**Sources.** The source of funds that may be used to pay for infrastructure costs depends on the requirements regarding use of funds under the law authorizing the partner program that is contributing the funding. The infrastructure funding may be from funds classified as administrative, program, or both, depending on the partner program's requirements.

## **VII. COST RECONCILIATION**

All parties agree that a bi-annual reconciliation of budgeted and actual costs and update of the allocation bases will be provided for the review.

The LWDB will submit invoices to the Partners and send a copy of the updated budget to all Parties. Partners will communicate any disputes with costs in the invoice or the budget to the LWDB in writing. The LWDB will review the disputed cost items and respond accordingly to the Partner. When necessary, the LWDB will revise the invoice and the adjusted budget upon resolution of the dispute.

One-Stop delivery system infrastructure costs are defined as non-personnel costs that are necessary for the general operation of the one-stop career center, including, but not limited to: rental of the facilities; utilities and maintenance; equipment, including assessment-related products and assistive technology for individuals with disabilities; and, technology to facilitate access to the One-Stop delivery system, including technology used for the center's planning and outreach activities. This may also include the costs associated with the development and use of the common identifier (i.e., American Job Center signage) and supplies, as defined in Uniform Guidance at 2 CFR 200.94, to support the general operation of the one-stop career center (WIOA sec. 1221 (h)(4) and 20 CFR 678.700(a), and 34 CFR 446.700(a)).

Non-personnel costs are costs that are not compensation for personnel costs. For example, technology-related services performed by vendors or contractors are non-personnel costs and may be identified as infrastructure costs if they are necessary for the general operation for the one-stop career center. Such costs would include service contracts with vendors or contractors, equipment and supplies.

Personnel services include salaries, wages, and fringe benefits of the employees of partner programs or their subrecipients, as described in 2 CFR 200.430 & 200.431 of the Uniform Guidance. For example, allocable salary and fringe costs of partner program staff who work on information technology systems (e.g., common performance and reporting outcomes) for us4e by the one-stop center as a whole would be personnel costs. The costs of a shared welcome desk or greeter directing employers and customers to the services or staff that are available in that one-stop career center is a personnel expense. These costs, therefore, could not be included in infrastructure costs but are included in "additional costs."

All Parties to this IFA recognize that infrastructure costs are applicable to all required Partners, whether they are physically located in the One-Stop career center or not. Each partner's contributions to these costs, however, may vary, as these contributions are based on the proportionate use and relative benefit received, consistent with the Partner programs authorizing laws and regulations and the Uniform Guidance.

## **VIII. METHODS OF INTERNAL REFERRAL**

Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program need, to ensure that high quality and convenient services are available to potentially eligible customers of the One-Stop delivery system.

The primary principle of the referral system is to provide integrated and seamless delivery of services to workers, job seekers, and employers. In order to facilitate such a system,

Partners agree to:

- a) Familiarize themselves with the basic eligibility and participation requirements, as well as with the available services and benefits offered, for each of the Partners' programs represented in the local American Job Center network;
- b) Develop materials summarizing their program requirements and making them available for Partners and customers;
- c) Provide a paragraph regarding a description of services with website link to organization/entity to be placed on CSP website for ease and consistency of referrals.
- d) Develop and utilize common intake, eligibility determination, assessment, and registration forms;
- e) Provide substantive referrals to customers who are eligible for supplemental and complementary services and benefits under partner programs,
- f) Regularly evaluate ways to improve the referral process, including the use of customer satisfaction surveys,
- g) Commit to robust and ongoing communication required for an effective referral process, and
- h) Commit to actively follow up on the results of referrals and assuring that Partner resources are being leveraged at an optimal level.

## **IX. DATA SHARING**

CareerSource Polk will provide employment services to individuals participating in the partner programs and aggregated information to assist the Partner in its evaluation of the effectiveness of programs as it relates to the employment of students who have participated in partner programs. The Partner will utilize this information for tracking Return on Investment (ROI). All data received will remain confidential and CareerSource Polk will only allow those employees who have a legitimate need to access the information with access to the personally identifiable information provided by the Partner.

Partners agree that the use of high-quality, integrated data is essential to inform decisions made by policymakers, employers, and job seekers. Additionally, it is vital to develop and maintain an integrated case management system, as appropriate, that informs customer service throughout customers' interaction with the integrated system and allows information collected from customers at intake to be captured once.

Partners further agree that the collection, use, and disclosure of customers' personally identifiable information (PII) is subject to various requirements set forth in Federal and State privacy laws. Partners acknowledge that the execution of this MOU, by itself, does not function to satisfy all of these requirements.

All data, including customer PII, collected, used, and disclosed by Partners will be subject to the following:

- a) Customer PII will be properly secured in accordance with the Local WDB's policies and procedures regarding the safeguarding of PII.
- b) The collection, use, and disclosure of customer education records, and the PII contained therein, as defined under FERPA, shall comply with FERPA and applicable State privacy laws.
- c) All confidential data contained in UI wage records must be protected in accordance with the requirements set forth in 20 CFR Part 603.
- d) All personal information contained in VR records must be protected in accordance with the requirements set forth in 34 CFR 361.38.
- e) Customer data may be shared with other programs, for those program's purposes, within the American Job Center network only after the informed written consent of the individual has been obtained, where required.
- f) Customer data will be kept confidential, consistent with Federal and State privacy laws and regulations.
- g) All data exchange activity will be conducted in machine readable format, such as HTML or PDF, for example, and in compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794 (d)).

All one-stop career center and Partner staff will be trained in the protection, use, and disclosure requirements governing PII and any other confidential data for all applicable programs, including FERPA-protected education records, confidential information in UI records, and personal information in VR records.

#### **X. TERM**

The Term of this IFA shall commence on March 1, 2019, or the date last executed by both parties, whichever is later, through June 30, 2019, and will automatically renew annually for successive one-year terms, unless otherwise terminated by either party. The parties agree to review this IFA no less than once every three-year period to ensure appropriate funding and delivery of services. This IFA may be terminated for convenience at any time by either party upon thirty (30) days written notice.

#### **XI. AMENDMENTS AND MODIFICATIONS**

Neither this IFA nor any provision hereof may be changed, waived, discharged or terminated orally, but only by an instrument in writing signed by each of the parties to this Agreement sent via certified U.S. mail.

#### **XII. MERGER**

This IFA constitutes and expresses the entire and integrated understanding and agreement between the parties hereto, superseding, incorporating and merging all prior understandings, agreements, and discussions relating to the transactions contemplated hereby, and no agreements, understandings, prior negotiations, prior discussions, warranties, representations or covenants not herein expressed shall be binding upon the parties.

#### **XIII. THIRD PARTY BENEFICIARY**

The Parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this IFA. None of the Parties intend to

directly or substantially benefit a third party by this IFA. The Parties agree that there are no third-party beneficiaries to this IFA and that no third party shall be entitled to assert a claim against any of the Parties based upon this IFA.

#### **XIV. GOVERNANCE**

The accountability and responsibility for the One-Stop career center system's organizational activity and accomplishments will rest with CareerSource Polk. Pursuant to the Act CareerSource shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this IFA will be resolved in accordance with CareerSource Polk's Grievance/Complaint and Hearing/Appeal Procedures.

#### **XV. DISPUTE RESOLUTION**

If an issue arises involving this IFA, both parties will make every effort to reach a resolution in a timely and efficient manner. Either partner may request a face-to-face meeting of the local partners to identify and discuss the issue. If resolved and no further action is deemed necessary by the partners, the issue and the resolution will be documented in writing.

If not resolved, the issue and the efforts to resolve will be documented and forwarded to the President/CEO of CareerSource Polk and the Director of the Partner organization. A joint decision shall be issued within 60 calendar days of receipt.

If dissatisfied with the decision, the dispute may be filed with the State of Florida Department of Economic Opportunity (DEO) and the Commissioner of the Department of Education (DOE) to review concerns and determine resolution. DEO and DOE may remand the issue back to the President/CEO of CareerSource Polk and to the Director of the Partner organization, Partner or impose other remedies to resolve the issue.

CareerSource Polk Winter Haven Career Center Partners PY2018-2019							
Required Program Partners	Governance	Local Grantee	# of Staff	Total weekly Staff Hours	Total # of FTEs	% of Total FTEs	Partner Contribution
Adult, Dislocated Workers, Youth Formula Grants	DOL	CSP	15	600	15	42.14%	140,532.26
Job Corps**	DOL	Job Corps	1	4	1	0.28%	933.77
Wagner Peysen	DOL	CSP	7	280	7	19.66%	65,563.94
Senior Community Employment Service Program	DOL	AARP	2	40	1	2.81%	9,371.04
TAA Program Trade Adjustment Act	DOL	CSP	0	0	0	0.00%	00.00
RESEA	DOL	CSP	2	80	2	5.62%	18,742.08
UC Programs*	DOL	CSP	0	0	0	0.00%	00.00
Veteran Program DVOP	DOL	CSP	1	40	1	2.81%	9,371.04
Adult Education GED, Career Tech (Ridge & Travis)	DOE	PCSB	2	40	1	2.81%	9,371.04
Vocational Rehabilitation**	DOE	VR	1	8	2	5.6%	1,867.54
Division of Blind Services**	DOE	Florida Division of Blind Services	1	4	1	2.8%	933.77
Welfare Transition	HHS/TANF	CSP	6	240	6	16.85%	56,192.90
SNAP Employment & Training	HHS	CSP	2	80	2	5.62%	18,742.08
ALPI**	HHS	ALPI	2	8	2	5.6%	1,867.54
<b>Total</b>			<b>43</b>		<b>35.6</b>		<b>333,489.00</b>

➤ **Estimated Infrastructure Budget 2018-2019**

1. Total= \$333,489.00. This amount is required to determine the Costs per FTE.

➤ **Infrastructure Contribution (Estimated)**

1. Cost per FTE=IFR Budget Total/Total FTE

2. Cost per FTE= \$9371.04

➤ **Estimated Partner Infrastructure Contribution**

1. Cost per FTE x Partners total # of FTEs

➤ **Direct Linkage Infrastructure Contribution**

1. Direct Linkage is defined as a minimum of 8 hours/ 40 a week (.02 FTE) and 4 hours/40 a week (.01 FTE) of time for access through technology.

2. Direct Linkage = \$1,867.54 and \$933.77

\* Unemployment Compensation: Direct Linkage; State of Florida DEO will determine contribution level.

\*\*Vocational Rehabilitation, Division of Blind Services, ALPI, and AARP, Job Corps: Direct Linkage