

CareerSource

Okaloosa Walton

Local Workforce Development Area 02

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INTRODUCTION

These guidelines direct the first local plan submitted by your area under the Workforce Innovation and Opportunity Act. WIOA requires each local workforce development board (LWDB or local board) to develop and submit, in partnership with the local chief elected official, a comprehensive four-year plan to the state. The WIOA four-year plan will be effective July 1, 2016 – June 30, 2020. The law emphasizes the importance of collaboration and transparency in the development and submission of the plan. Affected entities and the public must have an opportunity to provide input in the development of the plan. The local board must make the plan available through electronic means and in open meetings in order to ensure transparency to the public.

The LWDBs must provide leadership in assembling their plan. LWDBs also should seek broad stakeholder involvement in the development of their local plan. Local elected officials, local workforce development board members, core program partners and mandatory one-stop partners must be an integral part of the planning process. WIOA encourages an enhanced, integrated system by including new core programs in its planning and performance requirements. Each plan will address how the LWDB will coordinate service delivery with the new core programs of Vocational Rehabilitation, Blind Services and Adult Education.

Each LWDB's plan should be based on the current and projected needs of the workforce investment system, placing an increased emphasis on coordination and collaboration at all levels to ensure a seamless system for job seekers, including those with disabilities, and employers. The plan must include an identification of the education and skill needs of the workforce and employment needs of the local area and include an analysis of the strengths and weaknesses of services to address these identified needs. The assessment must include the best available information or evidence of effectiveness and performance information for specific service models as well as a plan to improve the effectiveness of such programs by adopting proven or promising practices as a part of the local vision. The LWDB should provide a complete view of the system-wide needs of the local workforce development area.

The plan must address how the LWDB will foster strategic alignment, improve service integration and ensure that the workforce system is industry-relevant; responding to the economic needs of the local workforce development area and matching employers with skilled workers. The local plan must lead to greater efficiencies by reducing duplication and maximizing financial and human resources. These plan guidelines require LWDBs to address current and future strategies and efficiencies to address the continuous improvement of Florida's workforce system and its focus on customer service excellence. This plan should align with the business and market-driven principles of the CareerSource Florida network.

Local plans should align with CareerSource Florida's business and market-driven principles to be the global leader for talent. These principles include:

- Increasing the prosperity of workers and employers
- Reducing welfare dependency
- Meeting employer needs
- Enhancing productivity and competitiveness

PROCESS FOR PLAN SUBMITTAL

CareerSource Florida, Inc., established a form entitled “WIOA Local Plan Submission Form.” The form will be used to submit the two-year modification of the local plan, required attachments, and contact information for primary and secondary points of contact for each LWDB. All two-year modifications for local plans must be submitted no later than 5:00 p.m. (EST) on Thursday, March 29, 2018.

Prior to plan submission, please ensure:

- **The local board reviewed and approved the plan;**
- **The board chair and the chief elected official signed the appropriate document, with an original submitted to CareerSource Florida by mail to *WIOA Plans c/o Warren Davis, Policy Analyst, 2308 Killearn Center Blvd. Suite 101, Tallahassee, FL 32317*. Please also send a scanned copy to FloridaWIOA@careersourceflorida.com. This email address can also be used to submit any questions pertaining to the two-year modification process;**
- **The structure and numbering follows the plan instructions format (beginning with Section I of these instructions);**
- **The plan is one continuous and searchable PDF document including all attachments;**
- **Responses to all questions are informative and concise;**
- **The name of the local area, the page number and plan submission date are listed in the footer of the document;**
- **A table of contents with page numbers is included and each page of the plan is numbered; and,**
- **Text is typed with a font size of 11 or greater.**

Please email FloridaWIOA@careersourceflorida.com and confirm plan submission. This begins the plan’s official review by the Department of Economic Opportunity (DEO). Upon submission, all plans are reviewed for completeness and adherence to plan formatting requirements. If there are questions or concerns local boards are notified. The content of plans is reviewed by both DEO and CSF staff with a recommendation for approval or disapproval provided to the CSF Board of Directors at its meeting scheduled for May 16, 2018.

A recommendation for approval is made unless the staff review indicates: (1) there are deficiencies in local workforce investment activities that are not addressed, or (2) the plan is inconsistent with WIOA and its regulations, including required public comment provisions. It is recognized that this two-year modification will include strategies and activities that are fully completed, as well as some that are still being developed and implemented.

KEY DATES

Local Plan Guidelines Issued.....	January 3, 2018
Local Plans Due	March 29, 2018
Local Plans Approved.....	May 16, 2018
WIOA Program Year 2018 Begins	July 1, 2018

FLORIDA'S VISION FOR IMPLEMENTING THE WORKFORCE INNOVATION AND OPPORTUNITY ACT

The implementation of WIOA ensures Florida has a business-led, market-responsive, results-oriented, and integrated workforce development system. The system fosters customer service excellence, ensures 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 increases economic prosperity by maximizing the competitiveness of Florida businesses and the productivity of Florida's workforce.

Florida's strategic vision for WIOA implementation is realized by accomplishing these three goals:

- Enhance 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.
- Promote accountable, transparent and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.
- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Florida youth that 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.**

Okaloosa County Commissioner Graham W. Fountain - Chair
302 N. Wilson Street, Ste, 302
Crestview, FL 32536
(850)689-5030
gfountain@co.okaloosa.fl.us

Walton County Commissioner William Chapman – Chair
9446 Rock Hill Road
Ponce De Leon, FL 32455
(850)835-4836
chabill@co.walton.fl.us

- 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 executed agreement that defines how parties carry out roles and responsibilities of the chief elected official.**

The current Interlocal Agreement (Attachment 1) between Okaloosa County Board of County Commissioners and Walton County Board of County Commissioners is included at Attachment 1. The new Interlocal Agreement was presented to Walton County Commissioners at their regularly scheduled meeting on June 14, 2016, and at the Okaloosa County Commissioners regularly scheduled meeting on June 21, 2016.

CareerSource Okaloosa Walton is incorporated as a 501(c) 3 not-for-profit organization. The Interlocal Agreement delineates the CareerSource Okaloosa Walton Board as the administrative and fiscal entity for the workforce region.

The Boards of County Commissioners of Okaloosa and Walton Counties have entered into an Interlocal Agreement that specifies the geographic area of the workforce region, describes the make-up of the regional Workforce Board (dba CareerSource Okaloosa Walton) and its appointment processes.

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

Included as Attachment 1 is the Interlocal Agreement between Okaloosa County Board of County Commissioners and Walton County Board of County Commissioners for the period ending June 30, 2020.

D. Describe the by-laws established by the CEO to address criteria contained in §679.310(g) of the proposed WIOA regulations:

i. The nomination process used by the CEO to elect the local board chair and local board members;

CareerSource Okaloosa Walton Board members are appointed by the Boards of County Commissioners of both Okaloosa and Walton Counties for fixed and staggered terms. Private sector nominations are solicited from the five area Chambers of Commerce, two Economic Development Councils or other business organizations. The Board members are appointed by the Okaloosa and Walton Counties Boards of County Commissioners as outlined in federal and state legislation. As agreed to in the current Interlocal Agreement between the Boards of County Commissioners of Okaloosa and Walton Counties, the current size of the Board is not more than 29 members with a majority of its members representing the private sector. Gender, race, size of business, and geographical representation are all considered when soliciting nominations for private sector appointments.

The officers of the CareerSource Okaloosa Walton Board are elected annually at a regularly scheduled meeting of the Board of Directors which has been duly noticed for that purpose. Term of office shall be for a period of one year from July 1 through June 30. Election of officers shall be held at least 15 calendar days prior to the end of the term for current officers.

As outlined in the CareerSource Okaloosa Walton Interlocal Agreement and By-Laws, the CareerSource Okaloosa Walton Chair appoints a nominating committee and its chair to include representatives from both Okaloosa and Walton Counties. The Nominating Committee presents the slate of nominees for the position of Chair, Vice Chair, Secretary, Treasurer, and an Executive Committee Member-at-Large from each county. A vacancy in any office because of death, resignation, removal, disqualification or otherwise may be filled by the Board of Directors for the unexpired portion of the term.

ii. The term limitations and how term appointments are staggered to ensure only a portion of memberships expire in each year;

CareerSource Okaloosa Walton By-Laws stipulate Board of Directors membership and staggered terms. At the initial process of the CareerSource enactment, the Board terms were staggered. The terms have remained staggered due to normal resignation and expirations or terms. The Executive Director on a scheduled basis monitors the terms of the Boards to ensure compliance.

iii. The process to notify the CEO of a board member vacancy ensuring a prompt nominee;

The applicable Board of County Commissioners are not notified at the time of Board vacancy, but rather time of appointment. The Private sector vacancy nominations are solicited from the five area Chambers of Commerce, two Economic Development

Councils or other business organizations as outlined in the CareerSource Okaloosa Walton By-Laws. Nominations are then presented to the applicable Okaloosa and Walton Counties Boards of County Commissioners for selection to the CareerSource Okaloosa Walton Board as outlined in federal and state legislation.

iv. The proxy and alternative designee process used when a board member is unable to attend a meeting and assigns a designee per requirements at §679.110(d)(4) of the proposed WIOA regulations;

CareerSource Okaloosa Walton By-Laws do not allow for proxy voting. To allow for proxy voting, the CareerSource Okaloosa Walton By-Laws would require an amendment. CareerSource Okaloosa Walton By-Laws are reviewed on an annual basis and any revisions are recommended at a scheduled CareerSource Okaloosa Walton Board of Directors meeting.

v. The use of technology, such as phone and web-based meetings used to promote board member participation;

In parallel to the CareerSource Florida, Inc. Board of Directors meetings, teleconferencing is allowable and is in place for the CareerSource Okaloosa Walton Board of Directors and applicable Council meetings. All CareerSource Board of Directors meeting are publicly noticed to ensure compliance with the Florida Sunshine Laws, including a legal ad in the Northwest Florida Daily news and posted to the CareerSource Okaloosa Walton website (www.careersourceokaloosawalton.com).

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,

The CareerSource Okaloosa Walton Board of Directors has adopted and supports the following goals:

- Ensure alignment of regional workforce, education, and economic goals
- Establish stronger ties with local education agencies for the school districts, Community College, and the University to ensure academic success, increased graduation rates, increased number of skilled and credentialed graduates, and promotion of a continuum of education through life-long learning
- Increase workforce development investment in economic development through stronger ties, higher-level membership and participation with the Okaloosa Economic Development Council, the Walton County Economic Development Alliance and regional economic development initiatives to ensure needs of existing businesses are being met while partnering to recruit targeted industries for expansion or relocation into the workforce region

- Establish the CareerSource Okaloosa Walton Board of Directors as the recognized convener and facilitator for solving workforce issues in order to meet the needs of businesses, job seekers, employed workers and the community and allow for continued economic growth
- Ensure the voice of business is the driving force for designing all services for workforce development to ensure the competitiveness of local businesses not only for employee recruitment but also employee retention through training of employed workers. Identify targeted industries in collaboration with economic development agencies with emphasis on establishing a pipeline for the future workforce as well as upgrading skills of the existing workforce
- Establish and maintain through continuous improvement a seamless delivery of services through the One-Stop system
- Increase the integration of services provided by the three major state agencies of the Department of Economic Opportunity, Vocational Rehabilitation, and the Department of Children and Families as well as numerous other One-Stop mandatory and optional parties
- Reduce the number of individuals with dependent children who need to rely on Temporary Assistance for Needy Families by providing effective programs and services designed to achieve employment and Self-and Family Sufficiency
- Integrate welfare transitional services into the full menu of workforce development services provided through the CareerSource Okaloosa Walton One-Stop System to maximize the numbers and percentages of successful transitions from welfare to self-sufficiency
- Maximize services to all youth with special emphasis on targeted, at-risk youth leading to increased numbers of educated and skilled graduates who are prepared to enter employment, enter the military, or pursue higher education
- Elevate and actively promote the vital role of Career Education as a viable and attractive choice for secondary students to develop a career path that includes a continuum of life-long learning and industry recognized credentials
- Maximize collaboration and leveraging of other federal, state, and local resources for the One-Stop System

vii. Any other conditions governing appointments or membership on the local board.

As previously stated, private sector nominations are solicited from the five area Chambers of Commerce, two Economic Development Councils or other business organizations. When nominations are received from the named entities to the CareerSource Okaloosa Walton, the CareerSource Okaloosa Walton Executive Director meets with the nominees to provide an overview of the CareerSource Board of Directors role and responsibilities including (but not limited to) sunshine laws and financial disclosure requirements.

LWDA 02 does have military installation representation as a non-voting Board member. The current non-voting military installation representative is from the Air Force Development Flight, Eglin Air Force Base. Commissioners from both Okaloosa and Walton Counties serve as non-voting, advisory members as do representatives from local military installations.

E. Provide a description of how the CEO is involved in the development, review and approval of the local plan and its two-year modification.

The Chief Elected Officials (or representatives) were notified of the plan requirements during the preparation process.

The CareerSource Okaloosa Walton draft plan was presented to the CEO prior to the request of the full Commissioners Board review/approval.

(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.

Pamela A. Tedesco
President
The Arland Affiliation
Post Office Box 2111
Santa Rosa Beach, Florida 33435
Phone Number: 850.651.2315
E-Mail: Pam@ArlandAffiliation.com

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 or organization the vice-chair represents.

Barbara (BJ) White
VP of Corporate Development
American Elite Molding
5680 John Givens Road
Crestview, FL 32539
Phone Number: 850.688.2041
E-Mail: bmitchell@aem-ties.com

C. Provide a description of how the LWDB was involved in the development, review, and approval of the local plan and its two-year modification.

The CareerSource Okaloosa Walton modified plan was presented by the Executive Director at the regularly scheduled CSOW Board meeting on February 7, 2018 for review and approval. The plan document was provided to each Director prior to the February meeting for review.

The CareerSource Okaloosa Walton Board's request for public comment on the Plan was widespread. The Board used both a formal and an informal process of soliciting comments from the public, which included Board members, partner agencies, community and faith based organizations, organized labor, and One-Stop customers (jobseekers and businesses).

The CareerSource Okaloosa Walton plan was also posted via the CareerSource Okaloosa Walton website for review and comments. The public was also invited to submit comments as part of the presentations and requests for approval at both the Okaloosa Board of County Commissioners and Walton County Board of Commissioners.

(3) Local Grant Subrecipient (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.

CareerSource Okaloosa Walton and its designated staff, serves as its own administrative entity.

As outlined in the current CareerSource Okaloosa Walton By-Laws, CareerSource Okaloosa Walton functions as the workforce organization for Okaloosa and Walton Counties. The purpose of the organization is design, establish, and oversee the workforce development system for the residents and business communities of Okaloosa and Walton Counties. CareerSource Okaloosa Walton is chartered and certified by the Governor for the specific responsibility as the governing board for carrying out all applicable federal and state employment and training programs in Okaloosa and Walton Counties.

Reference – Attachment 1 (CareerSource Okaloosa Walton Interlocal Agreement)

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

Reference – Attachment 1 (CareerSource Okaloosa Walton Interlocal Agreement)

C. 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, attach any agreements describing how the entity will carry out its multiple responsibilities, including how it develops appropriate firewalls to guard against 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.

As authorized in state legislation, SB428, in June 2008, the Workforce Development Board of Okaloosa and Walton Counties (now known as CareerSource Okaloosa Walton) requested a waiver from the Governor's Office and Workforce Florida, Inc. (now known as CareerSource Florida, Inc.) to adopt the Business Model of Direct Services Provider. That request was

granted and on July 1, 2008, the Workforce Development Board of Okaloosa and Walton Counties began to provide Direct Services for all adult and dislocated worker services.

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

(4) One-Stop System

A. Provide a description of the local one-stop system (including the number, type and location of the comprehensive center(s), and other service delivery points).

The CareerSource Okaloosa Walton system includes one (1) comprehensive One-Stop Center in Ft. Walton Beach; with two (2) satellite offices, one in DeFuniak Springs (Emerald Coast Technology College) and in the Eglin Education Center located on Eglin Air Force Base. CareerSource Okaloosa Walton also has a Mobile One-Stop to assist with remote service delivery areas or hiring events.

The CareerSource Okaloosa Walton One-Stop delivery system is designed to enhance access to services and improve long-term employment outcomes for individuals seeking assistance. CareerSource Okaloosa Walton is exploring the implementation of “call centers” to provide direct assistance for jobseekers that are unable to physically go to a CSOW One-Stop Center.

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.

Hours of operation of the comprehensive One-Stop Center are as follows:

- Monday through Friday – 8:00 a.m. through 4:00 p.m.
- Established Satellite offices time of operations fluctuate based on location.
- Hours of operation have been (and will be considered) adjusted based on unique situations of jobseeker or employer needs.

We are establishing a dress code policy along with child friendly hours in our center and satellite offices.

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

CareerSource Okaloosa Walton (CSOW) elected to implement the direct service delivery model effective July 1, 2008 (in compliance with SB 428) and was approved by Workforce Florida (now known as CareerSource Florida, Inc.). Since that time, CSOW has operated all of the career centers and affiliate sites in Okaloosa and Walton Counties.

CareerSource Okaloosa Walton elected to provide Direct Services for primarily four reasons:

- To Streamline Service Delivery by eliminating management layers and focusing more resources on delivery of services;
- Cost Savings that eliminated duplicative costs for senior management, audit costs, financial processing services for participants, procurement costs, dual software licenses fee, insurance and other overhead costs.
- To be able to respond more quickly and effectively to dynamic changes in the labor market and funding fluctuations.
- The Direct Services Model selected by the Board is clear, well defined, and allows maximum decision making at the Center level while clearly delineating expectations for performance and accountability.

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

At this time, CareerSource Okaloosa Walton (CSOW) is the provider of career services in Okaloosa and Walton Counties. Steps are under way to procure a youth service provider.

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.

As authorized in state legislation, SB428, in June 2008, the Workforce Development Board of Okaloosa and Walton Counties requested a waiver from the Governor's Office and Workforce Florida, Inc. to adopt the Business Model of Direct Services Provider. That request was granted and on July 1, 2008, the Workforce Development Board of Okaloosa and Walton Counties began to provide Direct Services for all one-stop system programs. CareerSource Okaloosa Walton was approved by CareerSource Florida to continue as the One Stop Operator on 10/25/17.

F. Pursuant to the CareerSource Florida Administrative Policy for One-Stop Certification, provide the required attestation that at least one comprehensive one-stop center in the local area meet the certification requirements.

The CareerSource Okaloosa Walton Fort Walton Beach Center is designated as the local area comprehensive one-stop center. The Fort Walton Beach Center meets the requirements of the CareerSource Florida's draft policy on One Stop Center Certification – Comprehensive One-Stop Center Requirements.

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:

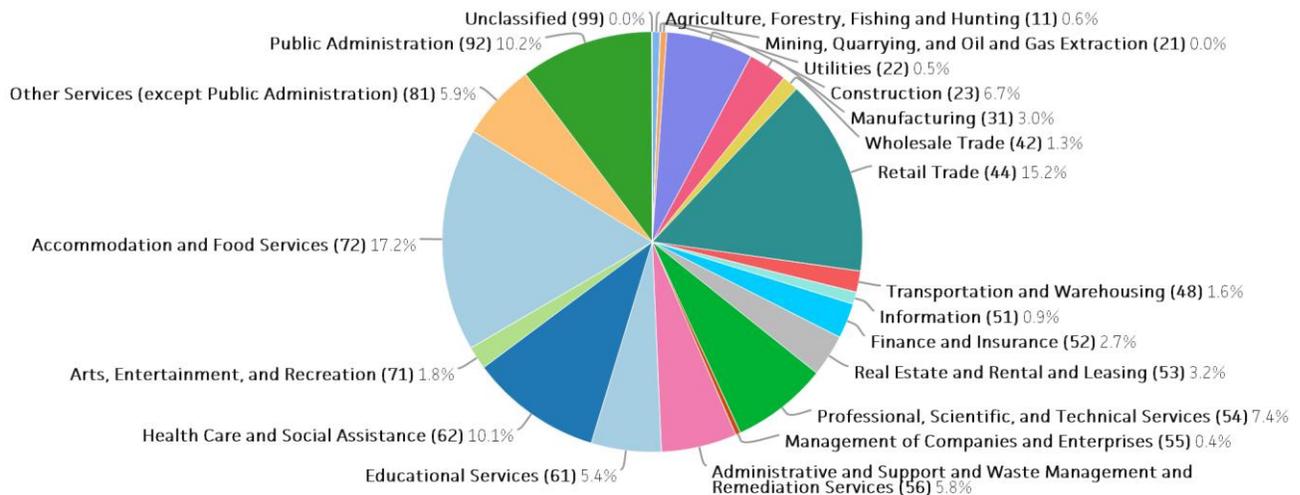
- A. Information on existing and emerging in-demand industry sectors and occupations; and**
- B. The employment needs of employers in those industry sectors and occupations (WIOA §108(b)(1)(A)).**

Please see the responses to A and B below.

Industry Sector

The largest sector in the CareerSource Okaloosa Walton is Accommodation and Food Services, employing 20,376 workers. The next-largest sectors in the region are Retail Trade (17,988 workers) and Public Administration (12,128). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Public Administration (LQ = 2.16), Real Estate and Rental and Leasing (1.91), and Accommodation and Food Services (1.91).

Total Workers for CareerSource Okaloosa Walton by Industry



Source: JobsEQ®, Data as of 2017Q3

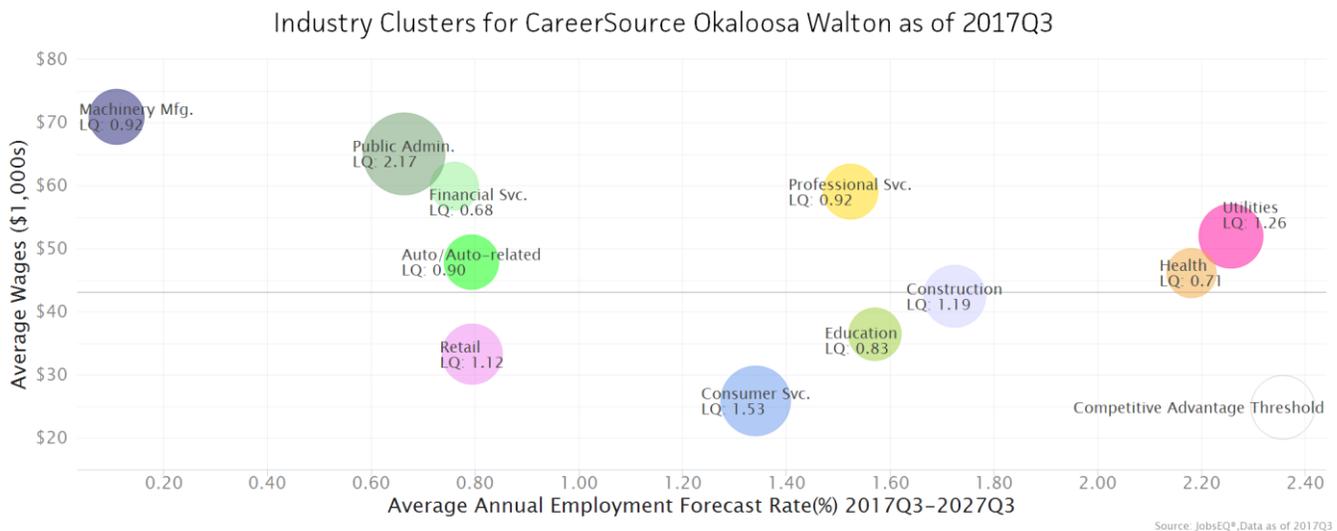
Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2017Q1 with preliminary estimates updated to 2017Q3.

Sectors in the CareerSource Okaloosa Walton with the highest average wages per worker are Wholesale Trade (\$97,231), Management of Companies and Enterprises (\$82,886), and Professional, Scientific, and Technical Services (\$76,452). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Accommodation and Food Services (+3,296 jobs), Retail Trade (+2,135), and Professional, Scientific, and Technical Services (+1,502).

Over the next 1 year, employment in the CareerSource Okaloosa Walton is projected to expand by 1,509 jobs. The fastest growing sector in the region is expected to be Health Care and Social Assistance with a +2.2% year-over-year rate of growth followed by Educational Services (+2.0%) and Professional, Scientific, and Technical Services (+1.7%). The strongest forecast by number of jobs over this period is expected for Accommodation and Food Services (+267 jobs), Health Care and Social Assistance (+261), and Professional, Scientific, and Technical Services (+148).

Industry Clusters

A cluster is a geographic concentration of interrelated industries or occupations. The industry cluster in the CareerSource Okaloosa Walton with the highest relative concentration is Public Administration with a location quotient of 2.17. This cluster employs 12,128 workers (10% of total employment) in the region with an average wage of \$65,019. Employment in the Public Administration cluster is projected to expand in the region about 0.7% per year over the next ten years.



Location quotient and average wage data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, imputed where necessary, and updated through 2017Q1 with preliminary estimates updated to 2017Q3. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

		Current			Historical				Forecast		
		Four Quarters Ending with 2017q3			Total Change over the Last 5 Years	Average Annual % Change in Employment 2012q3-2017q3			Over the Next 1 Year		
NAICS	Industry	Employed	Avg. Annual Wages	Location Quotient	Employed	Career Source Okaloosa Walton	Florida	USA	Total Approx. Sep Demand	Total Growth Demand	Avg. Annual Growth Percent
11	Agriculture, Forestry, Fishing and Hunting	705	\$15,872	0.42	15	0.4%	-1.3%	0.7%	76	7	1.1%
21	Mining, Quarrying, and Oil and Gas Extraction	19	\$37,181	0.04	3	3.8%	1.0%	-5.3%	2	0	1.2%
22	Utilities	599	\$63,067	0.95	26	0.9%	0.5%	0.2%	54	9	1.5%
23	Construction	7,887	\$42,297	1.20	1,068	3.0%	6.8%	3.4%	779	138	1.7%
31	Manufacturing	3,541	\$61,858	0.36	-221	-1.2%	2.6%	0.8%	369	0	0.0%
42	Wholesale Trade	1,490	\$97,231	0.32	-148	-1.9%	1.7%	0.9%	157	15	1.0%
44	Retail Trade	17,988	\$27,941	1.41	2,135	2.6%	2.6%	1.3%	2,411	140	0.8%
48	Transportation and Warehousing	1,919	\$45,155	0.39	183	2.0%	3.3%	2.6%	203	16	0.8%
51	Information	1,105	\$69,161	0.47	-64	-1.1%	0.7%	0.9%	108	5	0.5%
52	Finance and Insurance	3,194	\$62,827	0.68	76	0.5%	2.3%	1.1%	302	24	0.8%
53	Real Estate and Rental and Leasing	3,827	\$41,162	1.91	417	2.3%	2.9%	2.0%	390	42	1.1%
54	Professional, Scientific, and	8,772	\$76,452	1.13	1,502	3.8%	3.5%	2.3%	756	148	1.7%

		Current			Historical				Forecast		
		Four Quarters Ending with 2017q3			Total Change over the Last 5 Years	Average Annual % Change in Employment 2012q3-2017q3			Over the Next 1 Year		
NAICS	Industry	Employed	Avg. Annual Wages	Location Quotient	Employed	Career Source Okaloosa Walton	Florida	USA	Total Approx. Sep Demand	Total Growth Demand	Avg. Annual Growth Percent
	Technical Services										
55	Management of Companies and Enterprises	449	\$82,886	0.26	89	4.5%	4.3%	2.7%	41	5	1.0%
56	Administrative and Support and Waste Management and Remediation Services	6,861	\$36,994	0.89	895	2.8%	4.1%	2.5%	794	107	1.6%
61	Educational Services	6,366	\$40,411	0.65	141	0.5%	1.2%	0.7%	593	127	2.0%
62	Health Care and Social Assistance	11,987	\$45,864	0.71	1,349	2.4%	2.6%	2.5%	1,132	261	2.2%
71	Arts, Entertainment, and Recreation	2,097	\$25,839	0.89	221	2.3%	2.8%	2.3%	295	28	1.3%
72	Accommodation and Food Services	20,376	\$22,757	1.91	3,296	3.6%	4.0%	3.0%	3,306	267	1.3%
81	Other Services (except Public	6,974	\$33,930	1.33	369	1.1%	2.0%	-0.2%	794	74	1.1%

		Current			Historical				Forecast		
		Four Quarters Ending with 2017q3			Total Change over the Last 5 Years	Average Annual % Change in Employment 2012q3-2017q3			Over the Next 1 Year		
NAICS	Industry	Employed	Avg. Annual Wages	Location Quotient	Employed	Career Source Okaloosa Walton	Florida	USA	Total Approx. Sep Demand	Total Growth Demand	Avg. Annual Growth Percent
	Administration)										
92	Public Administration	12,128	\$65,040	2.16	850	1.5%	0.3%	0.1%	1,117	80	0.7%
99	Unclassified	54	\$37,704	0.19	44	38.4%	13.8 %	17.1 %	6	1	1.2%
	Total - All Industries	118,337	\$43,154	1.00	12,246	2.2%	2.8%	1.7%	12,966	1,509	1.3%

Source: [JobsEQ®](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2017Q1 with preliminary estimates updated to 2017Q3. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in the CareerSource Okaloosa Walton is Food Preparation and Serving Related Occupations, employing 17,281 workers. The next-largest occupation groups in the region are Office and Administrative Support Occupations (15,908 workers) and Sales and Related Occupations (15,342). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Food Preparation and Serving Related Occupations (LQ = 1.70), Architecture and Engineering Occupations (1.69), and Building and Grounds Cleaning and Maintenance Occupations (1.34).

Occupation groups in the CareerSource Okaloosa Walton with the highest average wages per worker are Management Occupations (\$110,600), Computer and Mathematical Occupations (\$83,900), and Architecture and Engineering Occupations (\$81,900). The unemployment rate in the region varied among the major groups from 1.2% among Legal Occupations to 5.0% among Food Preparation and Serving Related Occupations.

Over the next 1 year, the fastest growing occupation group in the CareerSource Okaloosa Walton is expected to be Healthcare Support Occupations with a +2.5% year-over-year rate of growth. The

strongest forecast by number of jobs over this period is expected for Food Preparation and Serving Related Occupations (+241 jobs) and Sales and Related Occupations (+120). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (3,099 jobs) and Sales and Related Occupations (2,208).

Occupation Snapshot in CareerSource Okaloosa Walton														
		Current					Historical				Forecast			
		Four Quarters Ending with 2017q3			2017q3		Total Change over the Last 5 Years	Avg. Ann % Change in Employment 2012q3-2017q3			Over the Next 1 Year			
SO C	Occupation	Employed	Avg. Annual Wages ¹	LQ	Unempl oyed	Unempl Rate	Employ ed	Career Source Okaloo sa Walton	Florida	USA	Current Online Job Ads ²	Total Sep Deman d	Total Growth Deman d	Avg. Annual Growth Percent
11-0000	Management	5,682	\$110,600	0.80	79	1.4%	486	1.8%	2.6%	1.5%	309	460	88	1.5%
13-0000	Business and Financial Operations	6,869	\$71,000	1.13	172	2.6%	589	1.8%	2.7%	1.6%	293	625	84	1.2%
15-0000	Computer and Mathematical	2,978	\$83,900	0.86	67	2.4%	309	2.2%	3.3%	2.4%	474	205	54	1.8%
17-0000	Architecture and Engineering	3,384	\$81,900	1.69	73	2.3%	151	0.9%	2.9%	1.0%	137	251	42	1.3%
19-0000	Life, Physical, and Social Science	1,020	\$70,600	1.06	29	2.9%	96	2.0%	2.2%	1.1%	36	94	12	1.2%
21-0000	Community and Social Service	1,683	\$41,600	0.89	25	1.5%	-2	0.0%	1.8%	1.9%	74	192	29	1.7%
23-0000	Legal	765	\$79,300	0.79	10	1.2%	54	1.5%	1.0%	0.4%	12	49	10	1.3%
25-0000	Education, Training, and Library	5,639	\$46,300	0.85	245	4.2%	336	1.2%	1.2%	0.8%	131	526	113	2.0%

Occupation Snapshot in CareerSource Okaloosa Walton

		Current					Historical				Forecast			
		Four Quarters Ending with 2017q3			2017q3		Total Change over the Last 5 Years	Avg. Ann % Change in Employment 2012q3-2017q3			Over the Next 1 Year			
SO C	Occupation	Employed	Avg. Annual Wages ¹	LQ	Unempl oyed	Unempl Rate	Employ ed	Career Source Okaloo sa Walton	Florida	USA	Current Online Job Ads ²	Total Sep Deman d	Total Growth Deman d	Avg. Annual Growth Percent
27-0000	Arts, Design, Entertainment, Sports, and Media	1,893	\$45,000	0.89	50	2.7%	112	1.2%	2.0%	1.1%	48	184	17	0.9%
29-0000	Healthcare Practitioners and Technical	5,650	\$70,500	0.84	77	1.4%	791	3.1%	2.6%	1.7%	550	315	110	1.9%
31-0000	Healthcare Support	2,571	\$29,200	0.78	105	4.0%	440	3.8%	2.5%	2.2%	127	314	65	2.5%
33-0000	Protective Service	2,414	\$38,900	0.95	74	3.0%	-61	-0.5%	1.1%	1.0%	110	243	23	0.9%
35-0000	Food Preparation and Serving Related	17,281	\$24,400	1.70	824	5.0%	2,605	3.3%	3.9%	2.9%	858	3,099	241	1.4%
37-0000	Building and Grounds Cleaning and Maintenance	5,577	\$26,500	1.34	217	4.1%	906	3.6%	2.8%	1.0%	278	733	89	1.6%
39-0000	Personal Care and Service	3,439	\$23,900	0.75	127	3.7%	97	0.6%	2.4%	2.0%	233	549	64	1.9%
41-0000	Sales and Related	15,342	\$32,100	1.26	509	3.4%	1,578	2.2%	2.5%	1.3%	1,544	2,208	120	0.8%
43-0000	Office and Administrative Support	15,908	\$32,700	0.91	571	3.6%	1,607	2.2%	2.8%	1.7%	713	1,830	93	0.6%

Occupation Snapshot in CareerSource Okaloosa Walton

		Current					Historical			Forecast				
		Four Quarters Ending with 2017q3			2017q3		Total Change over the Last 5 Years	Avg. Ann % Change in Employment 2012q3-2017q3			Over the Next 1 Year			
SO C	Occupation	Employed	Avg. Annual Wages ¹	LQ	Unempl oyed	Unempl Rate	Employ ed	Career Source Okaloo sa Walton	Florida	USA	Current Online Job Ads ²	Total Sep Deman d	Total Growth Deman d	Avg. Annual Growth Percent
45-0000	Farming, Fishing, and Forestry	197	\$28,000	0.25	11	4.3%	14	1.5%	-1.4%	1.3%	0	21	2	0.8%
47-0000	Construction and Extraction	6,054	\$36,800	1.13	275	4.7%	868	3.1%	6.2%	2.6%	112	644	103	1.7%
49-0000	Installation, Maintenance, and Repair	5,949	\$41,400	1.32	162	2.9%	563	2.0%	3.1%	1.6%	392	581	78	1.3%
51-0000	Production	3,095	\$36,900	0.43	148	4.5%	151	1.0%	3.0%	1.2%	119	352	7	0.2%
53-0000	Transportation and Material Moving	4,946	\$31,900	0.62	228	4.5%	557	2.4%	3.6%	2.2%	280	613	52	1.0%
00-0000	Total - All Occupations	118,337	\$43,300	1.00	n/a	n/a	12,246	2.2%	2.8%	1.7%	6,896	14,089	1,509	1.3%

Source: [JobsEQ®](#)

Data as of 2017Q3 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Occupation wages are as of 2016 and should be taken as the average for all Covered Employment

2. Data represent found online ads active within the last thirty days in any zip code intersecting or within the selected region; data represents a sampling rather than the complete universe of postings.

Occupation employment data are estimated via industry employment data and the estimated industry/occupation mix. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through 2017Q1, imputed where necessary with preliminary estimates updated to 2017Q3. Wages by occupation are as of 2016 provided by the BLS and imputed where necessary. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

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

To meet the needs of employers in demand industry sectors, CareerSource Okaloosa Walton and its educational partners work closely together to determine the needs of employers and how to translate those needs into the training of potential employees or employed workers. The Business Services Team meets with employers in demand industries to identify both short term and long term needs and solutions. The training institutions have advisory boards made up of representatives from the relevant sectors and also host ad hoc groups for growth sectors such as manufacturing and defense contracts. These relationships continue to guide the development of training.

The CareerSource Okaloosa Walton has adopted an Account Management model in which Account Managers will specialize and become more knowledgeable on the particular talent needs of critical industry sectors. This model will allow account managers to better understand and assess the skill needs of companies in key industries creating workforce solution plans to address those needs.

Retired or otherwise separated military veterans make up one third of Okaloosa's workforce. The large military presence draws a great diversity of technology-based firms. With over 3,000 military men and women separating from the military and staying in the area each year our labor market offers an educated, highly-skilled and highly disciplined workforce. This coveted workforce supplements the defense contractors' needs.

The Technology Coast Manufacturing and Engineering Network (TeCMEN) is a collaborative network of high-technology manufacturing and engineering service companies working together to gain access to larger projects by partnering and teaming. The EDC created TeCMEN in its commitment to growing its technology industries. Assisting in this commitment are Okaloosa's learning institutions that offer associate, undergraduate, master's and doctoral degrees, as well as certification programs and technology-transfer services. The defense contracting in Okaloosa County creates the foundation for growth and expansion in high-technology segments of the economy. Local defense contractors have increased hiring in response to the increased military spending since September 11, 2001. Many are obtaining new contracts each year requiring hundreds of new employees. Okaloosa County is the leading technology center in Northwest Florida and continues to experience unprecedented growth.

With the military being the #1 contributor in Okaloosa's economy the EDC maintains a leading edge through the Defense Support Initiative Committee in order to ensure the retention and continual growth of the Department of Defense in Okaloosa County. Growth management planning is also an objective of the DSI in preparation for the BRAC realignment personnel.

The community's work force is supplemented by the spouses and dependents of the active duty military personnel and civilians, and the retired or separated military personnel from Eglin Air Force Base and Hurlburt Field.

Some occupations appear on both the fastest growing percentage growth and the most new job openings whereas while some occupations have an extremely high rate of growth, the raw numbers

remain small. Planning for training to fill vacancies must take both in consideration when decisions are being made on allocation of limited resources.

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

The population in the CareerSource Okaloosa Walton was 257,326 per American Community Survey data for 2012-2016.

The region has a civilian labor force of 119,595 with a participation rate of 60.6%. Of individuals 25 to 64 in the CareerSource Okaloosa Walton, 28.5% have a bachelor’s degree or higher which compares with 31.8% in the nation.

The median household income in the CareerSource Okaloosa Walton is \$55,053 and the median house value is \$189,578.

Summary ¹						
	Percent			Value		
	CareerSource Okaloosa Walton	Florida	USA	CareerSource Okaloosa Walton	Florida	USA
Demographics						
Population (ACS)	—	—	—	257,326	19,934,451	318,558,162
Male	50.7%	48.9%	49.2%	130,341	9,741,262	156,765,322
Female	49.3%	51.1%	50.8%	126,985	10,193,189	161,792,840
Median Age ²	—	—	—	38.4	41.6	37.7
Under 18 Years	21.8%	20.4%	23.1%	56,078	4,066,276	73,612,438
18 to 24 Years	9.1%	8.9%	9.8%	23,400	1,774,488	31,296,577
25 to 34 Years	14.8%	12.7%	13.6%	38,146	2,532,527	43,397,907
35 to 44 Years	11.7%	12.2%	12.7%	30,165	2,434,272	40,548,400
45 to 54 Years	13.6%	13.8%	13.6%	34,996	2,744,569	43,460,466
55 to 64 Years	13.0%	13.0%	12.6%	33,457	2,584,694	40,061,742
65 to 74 Years	9.4%	10.5%	8.3%	24,111	2,084,139	26,355,308

Summary ¹						
	Percent			Value		
	CareerSource Okaloosa Walton	Florida	USA	CareerSource Okaloosa Walton	Florida	USA
75 Years, and Over	6.6%	8.6%	6.2%	16,973	1,713,486	19,825,324
Race: White	80.8%	75.9%	73.3%	207,909	15,130,748	233,657,078
Race: Black or African American	8.5%	16.1%	12.6%	21,888	3,216,994	40,241,818
Race: American Indian and Alaska Native	0.6%	0.3%	0.8%	1,507	52,904	2,597,817
Race: Asian	2.5%	2.6%	5.2%	6,472	521,272	16,614,625
Race: Native Hawaiian and Other Pacific Islander	0.2%	0.1%	0.2%	432	11,288	560,021
Race: Some Other Race	3.4%	2.5%	4.8%	8,697	505,877	15,133,856
Race: Two or More Races	4.0%	2.5%	3.1%	10,421	495,368	9,752,947
Hispanic or Latino (of any race)	7.8%	24.1%	17.3%	19,970	4,806,854	55,199,107
Population Growth						
Population (Pop Estimates) ⁵	—	—	—	267,059	20,612,439	323,127,513
Population Annual Average Growth ⁵	1.3%	1.3%	0.8%	3,184	244,545	2,474,760
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over)	60.6%	58.7%	63.3%	119,595	9,557,443	159,807,099
Armed Forces Labor Force	4.5%	0.3%	0.4%	9,377	56,151	1,011,641
Veterans, Age 18-64	16.9%	5.8%	5.1%	25,557	694,218	10,165,671
Median Household Income ²	—	—	—	\$55,053	\$48,900	\$55,322
Per Capita Income	—	—	—	\$29,333	\$27,598	\$29,829
Poverty Level (of all people)	13.3%	16.1%	15.1%	33,178	3,139,258	46,932,225

Summary ¹						
	Percent			Value		
	CareerSource Okaloosa Walton	Florida	USA	CareerSource Okaloosa Walton	Florida	USA
Households Receiving Food Stamps	10.2%	14.8%	13.0%	10,267	1,092,862	15,360,951
Mean Commute Time (minutes)	—	—	—	24.2	26.7	26.1
Commute via Public Transportation	0.4%	2.1%	5.1%	447	182,328	7,476,312
Union Membership ³	7.7%	5.9%	10.7%	—	—	—
Educational Attainment, Age 25-64						
No High School Diploma	10.0%	11.4%	11.6%	13,712	1,173,167	19,478,050
High School Graduate	25.0%	28.3%	26.1%	34,186	2,917,112	43,788,541
Some College, No Degree	25.8%	20.9%	21.5%	35,296	2,155,654	36,025,193
Associate's Degree	10.7%	10.8%	8.9%	14,660	1,110,534	14,962,488
Bachelor's Degree	18.4%	18.9%	20.2%	25,136	1,950,524	33,845,524
Postgraduate Degree	10.1%	9.6%	11.6%	13,774	989,071	19,368,719
Housing						
Total Housing Units	—	—	—	142,672	9,152,815	134,054,899
Median House Value (of owner-occupied units) ²	—	—	—	\$189,578	\$166,800	\$184,700
Homeowner Vacancy	1.9%	2.5%	1.8%	1,288	125,551	1,395,797
Rental Vacancy	9.6%	8.5%	6.2%	3,718	245,911	2,855,844
Renter-Occupied Housing Units (% of Occupied Units)	34.8%	35.2%	36.4%	34,944	2,605,942	42,835,169
Occupied Housing Units with No Vehicle Available (% of Occupied Units)	5.0%	6.9%	9.0%	5,052	511,316	10,562,847
Social						

Summary ¹						
	Percent			Value		
	CareerSource Okaloosa Walton	Florida	USA	CareerSource Okaloosa Walton	Florida	USA
Enrolled in Grade 12 (% of total population)	1.1%	1.3%	1.4%	2,780	251,628	4,433,703
Disconnected Youth ⁴	3.1%	3.4%	2.8%	337	32,580	485,589
Children in Single Parent Families (% of all children)	33.9%	39.8%	34.7%	18,148	1,531,708	24,318,038
With a Disability, Age 18-64	12.3%	10.1%	10.3%	18,084	1,195,416	20,188,257
With a Disability, Age 18-64, Labor Force Participation Rate and Size	39.7%	37.8%	41.0%	7,186	452,139	8,278,834
Foreign Born	6.4%	19.9%	13.2%	16,369	3,967,671	42,194,354
Speak English Less Than Very Well (population 5 yrs and over)	3.1%	11.7%	8.5%	7,561	2,199,976	25,440,956

Source: [JobsEQ®](#)

1. American Community Survey 2012-2016, unless noted otherwise

2. Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

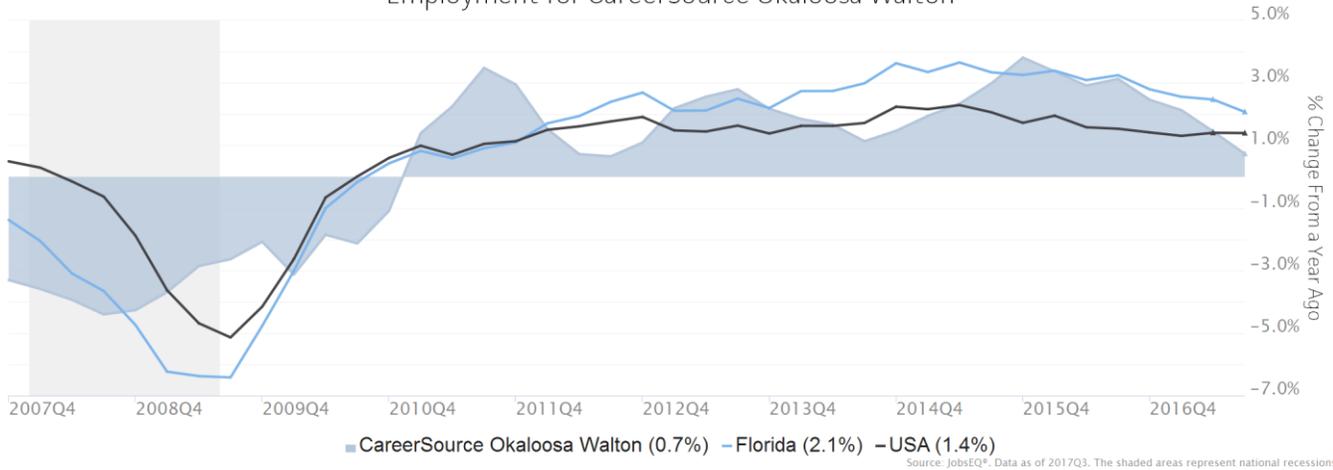
3. 2016; Current Population Survey, unionstats.com, and Chmura; county- and zip-level data are best estimates based upon industry-, MSA-, and state-level data

4. Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

Employment Trends

As of 2017Q3, total employment for the CareerSource Okaloosa Walton was 118,337 (based on a four-quarter moving average). Over the year ending 2017Q3, employment increased 0.7% in the region.

Employment for CareerSource Okaloosa Walton

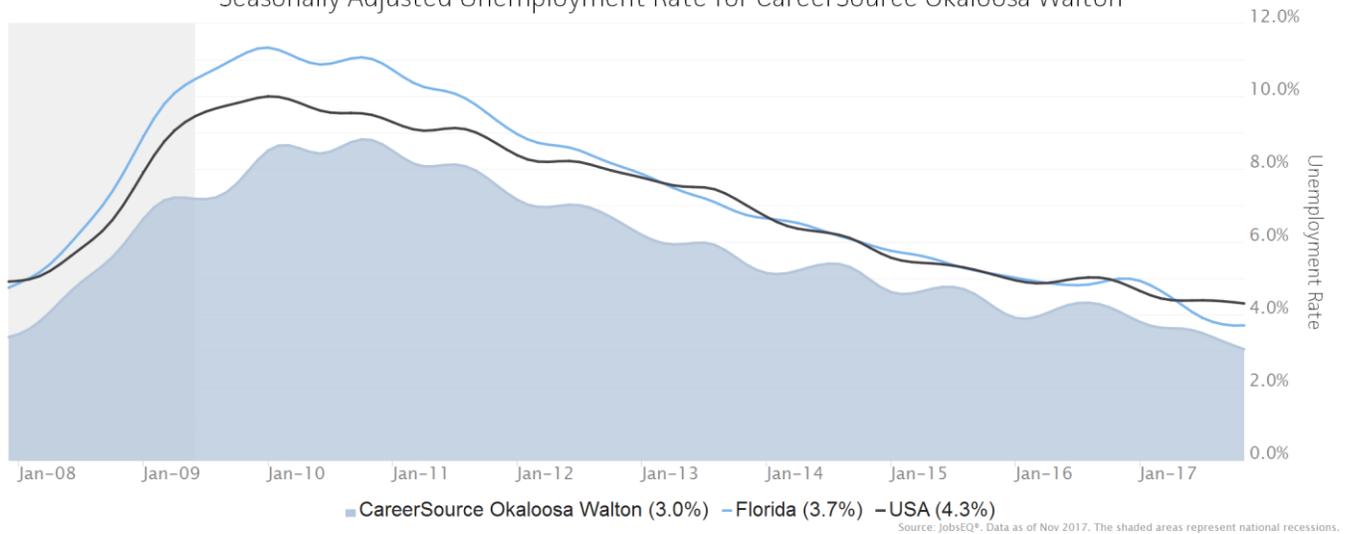


Employment data is derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data is updated through 2017Q1 with preliminary estimates updated to 2017Q3.

Unemployment Rate

The seasonally adjusted unemployment rate for the CareerSource Okaloosa Walton was 3.0% as of November 2017. The regional unemployment rate was lower than the national rate of 4.3%. One year earlier, in November 2016, the unemployment rate in the CareerSource Okaloosa Walton was 4.1%.

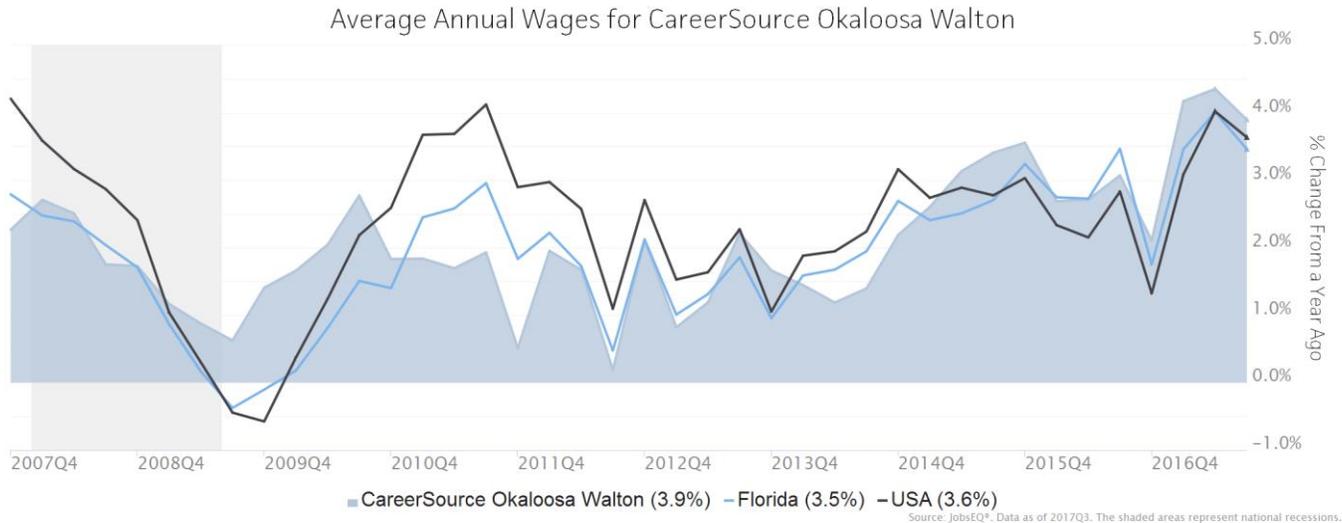
Seasonally Adjusted Unemployment Rate for CareerSource Okaloosa Walton



Unemployment rate data are from the Local Area Unemployment Statistics, provided by the Bureau of Labor Statistics and updated through November 2017.

Wage Trends

The average worker in the CareerSource Okaloosa Walton earned annual wages of \$43,154 as of 2017Q3. Average annual wages per worker increased 3.9% in the region during the preceding four quarters. For comparison purposes, annual average wages were \$54,666 in the nation as of 2017Q3.

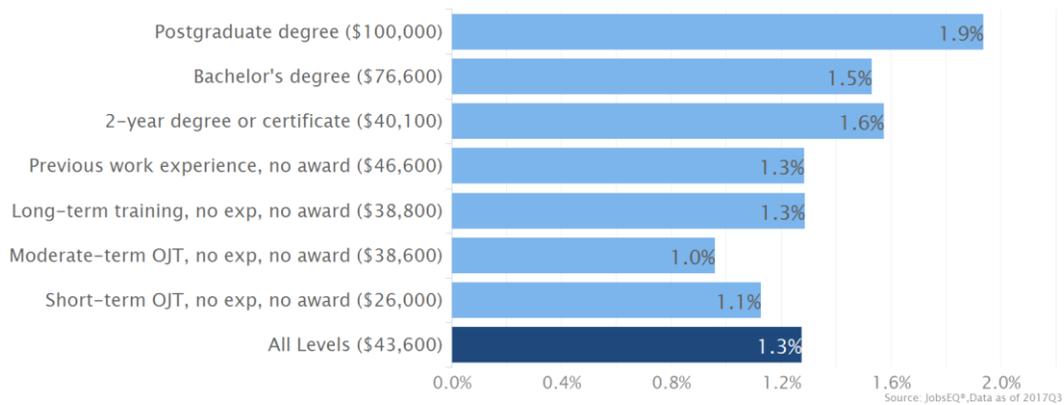


Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2017Q1 with preliminary estimates updated to 2017Q3.

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in the CareerSource Okaloosa Walton is projected to grow 1.3% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 1.9% per year, those requiring a bachelor's degree are forecast to grow 1.5% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 1.6% per year.

Annual Average Projected Job Growth by Training Required for CareerSource Okaloosa Walton



Employment by occupation data are estimates are as of 3rd Quarter 2017(2017Q3). Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Cost of Living

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 4.4% higher in CareerSource Okaloosa Walton than the U.S. average.

Cost of Living Information			
	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
CareerSource Okaloosa Walton	\$43,154	104.4	\$41,318
Florida	\$47,995	101.0	\$47,497
USA	\$54,666	100.0	\$54,666

Source: [JobsEQ®](#)

Data as of 2017Q3

Cost of Living per C2ER, data as of 2017q2, imputed by Chmura where necessary.

The major need of the area’s businesses is to increase the supply of available educated and skilled individuals who are equipped with the worker readiness skills necessary to meet the need of businesses.

CareerSource Okaloosa Walton is continuing to expand the partnership with applicable local community entities to move forward with solutions to the noted barriers to employment.

Because of the rural nature of parts of the workforce region and long distances to commute from home to work, transportation is an issue. The rising fuel costs have increased this challenge. Improvements

have been made; however, gaps still exist in availability of affordable, reliable transportation. Availability of child care for nighttime and shift work remains in short supply for those employees of businesses operating on a schedule different from the traditional 8-5. The Early Learning Coalition has also identified this as an important need for additional recruiting of quality service providers.

Jobseekers also continue to work multiple part time jobs due to the heavy concentration of retail and hospitality related services industry jobs. Part time employment generally has few, if any, benefits; and rarely ever provides medical care options.

Some occupations appear on both the fastest growing percentage growth and the most new job openings whereas while some occupations have an extremely high rate of growth, the raw numbers remain small. Planning for training to fill vacancies must take both in consideration when decisions are being made on allocation of limited resources.

Job Seekers continue to be challenged by lack of affordable housing, transportation, and child care for non-standard operating hours. Despite notable improvements public transportation is almost nonexistent and access to affordable and responsive transportation remains an obstacle for many who are transitioning into or reentering the workforce.

(5) Please provide an analysis of the workforce development activities (including education and training) in the region, 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 region (WIOA §108(b)(1)(D) and WIOA §108(b)(7)).

Training and educational challenges associated with the local population are routinely reviewed by the CareerSource Okaloosa Walton Business Competitiveness Council. The Business Competitiveness Council periodically reviews jobseeker analysis data compiled by the One-Stop Center staff. Local services are reviewed and adjusted as data is presented. The membership of the Business Competitiveness Council includes local community members representing private sector, education, and economic development. The members of the Council ensure that the needs of the jobseeker and employer are afforded an immediate response by the CareerSource Okaloosa Walton Board. One of the challenges identified consistently is meeting the needs of those associated with a high presence of military (active duty, veterans, and military families) and military support personnel in the local community

Currently the CareerSource Okaloosa Walton Veteran DEO (Department of Economic Opportunity) staff provides information as part of the Transitional Assistance Program for active duty military transitioning to the civil community. The TAP programs are conducted on a scheduled basis at Eglin Air Force Base and Hurlburt Field. The Board involvement with the TAP program has allowed the continued analysis of the military population transitioning to the civilian community. A new challenge is emerging since at this time the future of the TAP program is unknown. The Board has established Satellite CareerSource Okaloosa Walton Center at Eglin Air Force Base and provides outreach to Hurlburt Field Family Support Centers. EAFB is staffed by the LWDB 2 Veteran and Military Spouse team.

While some special populations are more prevalent in the CareerSource Okaloosa Walton One-Stop Career Centers than others, the CareerSource Okaloosa Walton Board with its Councils and the

One-Stop System will continue address the challenges involved in reaching out to these special populations.

CareerSource Okaloosa Walton Partnership with Post-Secondary Entities:

Founded in 1963, the University of West Florida (UWF) is distinctive institute of higher learning with undergraduate, graduate and targeted research programs. With multiple locations in Northwest Florida, the University serves a student population of more than 12,000. The University of West Florida is a public university with multiple instructional sites and a strong virtual presence. UWF's mission is to provide students with access to high-quality, relevant, and affordable undergraduate and graduate learning experiences; to transmit, apply, and discover knowledge through teaching, scholarship, research, and public service; and to engage in community partnerships that respond to mutual concerns and opportunities and that advance the economy and quality of life in the region. uwf.edu

Embry-Riddle Aeronautical University Worldwide is known for more than just the highly regarded aviation and aerospace programs. We offer a range of associate, bachelor's, and master's degrees, Ph.D., and certificate programs in multiple sectors — from business to engineering to fire science. Rigorous courses are taught by industry-leading experts who understand the demands of full-time work and military life because they have been there. Embry-Riddle Worldwide also offers flexible modes of learning that enable access to Embry-Riddle online courses anytime, anywhere. - worldwide.erau.edu

Northwest Florida State College has earned a reputation for educational excellence and community involvement. As part of Florida's public system of 28 state and community colleges, NWF State College offers bachelor's degree programs, associate degrees, and certificates. The college's primary service district stretches from the Gulf of Mexico to the Alabama state line. In addition to a 264-acre campus in Niceville, NWF State College operates a joint campus with the University of West Florida in Fort Walton Beach, the Chautauqua Center in DeFuniak Springs, and the Robert L.F. Sikes Education Center in Crestview and a center in South Walton County. - nwfsc.edu.

Emerald Coast Technical College (ECTC), formerly Walton Career Development Center has joined many other technical centers in the state and officially changed the name to better depict what the schools' goals and outcomes represent. Students have the opportunity to graduate with industry certifications and licensure. ECTC offers Post-Secondary Career and Technical Education; Adult Education; Secondary CTE; Career Dual Enrollment; Continuing Workforce Education. Emerald Coast Technical College has articulations with Northwest Florida State College and other state colleges. Tuitions are lowest in the area and financial aid is available to qualified applicants. - wcd.walton.k12.fl.us

Okaloosa Technical College (OTC) offers quality high school and adult education programs featuring state-of-the-art training facilities and professional, industry-experienced instructors. The programs they offer will provide you with nationally recognized industry certifications that will qualify you to enter the workforce or continue your education.

CareerSource Okaloosa Walton updates on a scheduled basis its Eligible Training Provider List (ETPL) (Attachment 4) to adjust programs offered in the local area. Approved providers review the courses approved and provide feedback regarding any revisions or additions to what they offer each year. Courses are reviewed by our CareerSource Quality Assurance to ensure the training is in demand areas that results in employment. If our placements in certain occupations are lagging due

to oversaturating the workforce from the numerous training providers in our area, courses will be removed by CareerSource Okaloosa Walton (at the recommendation of the Business Competitive Council) from the approved list to ensure federal resources are utilized to fill gaps in occupational areas. This reduces duplication within our two county area and enhances the use of federal dollars to provide financial support to our customers.

CareerSource Okaloosa Walton is actively involved with two local entities providing educational opportunities:

Technology Coast Manufacturing and Engineering Network (TeCMEN) - Administered by the Okaloosa Economic Development Council and a partnership between University of West Florida, CareerSource Okaloosa Walton, and Northwest Florida Manufacturing Council to provide skills training to existing manufacturing workforce customized to meet the needs of manufacturers. Certifications include: Lean Six Sigma; AS9100RC; and Project Management Professional

NWFMC Northwest Florida Manufacturing Council - NWFMC recently launched network of middle school and high school manufacturing academies throughout 10 counties of NWFL – over 1,000 students enrolled in first year.

(6) 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)).

- Adult and Dislocated Worker employment, education, and training services are extensively and continuously marketed through the local area.
- Orientations are offered to familiarize customers with programs, services and eligibility requirements.
- Current education and training services are designed and implemented in conjunction with local area labor market information/in-demand occupations and are designed and adjusted as necessary to meet customer and employer needs.
- CareerSource Okaloosa Walton offers a robust menu of employability skills, employment preparation and job retention workshops at full service one-stop career centers.
- Customers are counseled to assess work readiness, identify barriers and develop action plans to include education and training services.
- Customers who need additional assistance in addressing and overcoming barriers are referred to appropriate community services for assistance.
- WIOA customers are administered the Test of Adult Basic Education (TABE) to assess their current academic skill level and suitability for post-secondary training. Customers who are basic skills deficient are offered referrals to adult basic skills/literacy services for assistance.

- Individual Employment Plans are developed with customers so that they are able to move strategically along a career pathway.
- On-the-job training opportunities are developed with area employers to provide customers with access to a direct pathway to employment.
- WIOA Career Advisors provide ongoing counseling and support during enrollment, training, pre-placement and post placement follow-up.
- Employed and Incumbent Worker Training offered to employers in our local area. The training provides both workers and employers with the opportunity to build and maintain a quality workforce and increase both participants' and companies' competitiveness.

(7) 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 CareerSource Okaloosa Walton Board's Youth Program activities were designed using a successful evidenced-based model recommended by United States Department of Labor (USDOL)/Employment and Training Administration (ETA).

The CareerSource Board's Youth Program incorporates all 14 Essential Elements of the Workforce Innovation and Opportunity Act (WIOA) Youth Program. Following an orientation, intake, and assessment, the 14 elements will be available to program participants either through the proposed activities or referral to other partner agencies as appropriate, including activities for youth who are individuals with disabilities.

a. Tutoring and Study Skills Training:

There will be time devoted for the participant to work on homework and receive tutorial assistance. Tutoring will occur with assistance from the youth staff or referrals as appropriate. Specific subject-related tutoring may be coordinated with each participant's instructor so that feedback and effective modification of tutoring can be achieved. Volunteer mentors who will be recruited from the local community will also provide homework assistance and tutoring services.

b. Alternative Secondary School:

Participants may be referred for scheduled alternative educational activities consistent with local school district policies. Youth staff will make referrals to the school district as necessary. All referrals will be documented on a referral log or form and maintained for later reference.

c. Summer Employment Opportunities:

Summer employment opportunities may be provided through a Summer Training Component. This component will concentrate on skills related to specific jobs and the application of those skills. Youth participating in the WIOA Out-of-School Youth Program and meeting program expectations will receive first priority for the Summer Employment Opportunities.

d. Paid and Unpaid Work Experience:

Paid work experience in the form of incentives will be provided for youth through the summer and/or year-round training component. The components will concentrate on skills related to specific jobs and the application of those skills and will provide youth with exposure to the world of work and its requirements. The program will offer supervised acquisition of job specific occupational skills. Incentives, if provided will be based to the appropriate youth incentive plan.

e. Occupational Skill Training:

Occupational Skills Training primarily refers to older youth and out-of-school youth who may receive vouchers for training leading to a credential in a field of study through the Individual Training Account (ITA) system. Youth programs are authorized to pay for training for older/out-of-school youth using the ITA system. Based on availability of funds and appropriateness, Youth Career Advisors will refer participants to training programs listed on the CareerSource Regional Targeted Occupational List (RTOL). This procedure will assist older/out-of-school youth who have been determined to be in need of training services to receive an industry recognized credential. Older/out-of-school may also be enrolled in WIOA Adult Program, if appropriate.

The In-School Youth Program targets sophomores, juniors, and seniors who are attending school. Participants may receive hands-on training in occupational skills. Simulated occupational skills may be incorporated and applied in the context of this comprehensive youth program.

The Florida Ready-to-Work Credentialing System is fully implemented in Okaloosa and Walton Counties, and both in-school and out-of-school youth will be screened and referred for testing, if appropriate. Youth not meeting the criteria for the credential will be encouraged to enroll in prep on-line instruction.

f. Leadership Development Opportunities:

The program will provide leadership development opportunities as part of the curriculum for both the in-school and out-of-school youth. Engaging youth in community service projects is a valuable tool for teaching the value of giving back to the community.

g. Supportive Services:

Supportive service needs will be determined during the objective assessment and the development of the Individual Service Strategy (ISS). The supportive service needs will be documented in the ISS and in EF. Youth Career Advisors will identify the method by which supportive services will be provided; and, specify the method in the ISS, EF, and the ATLAS file. Assessment of needs for services will continue throughout participation in the program.

Acceptable supportive services are assistance for overcoming barriers to participating in a Workforce Innovation and Opportunity Act Program and must be documented in the ISS, EF, and the ATLAS file. Such assistance may include transportation, childcare, tools and required clothing (uniforms) for employment, etc.

Supportive services in the form of incentives will be available to in-school youth and out-of-school youth participants. Participants are eligible to earn an incentive based upon attendance, participation, and completion in accordance with the WIOA Youth Incentive Plan.

Participants in need of supportive services that are available through other agencies will be referred to the appropriate agency for assistance. Support services will be coordinated with schools, churches, youth services organizations, recreation and community centers, public assistance offices, housing authorities, shelters, sharing centers, Chambers of Commerce, public health department, counseling agencies, public transportation services, law enforcement agencies, drug and alcohol abuse prevention and treatment programs, and other suitable organizations, as needed.

Activities will be integrated with the Career Center as needed, and with other youth service organizations to facilitate a two-way referral network for program applicants and participants in need of services beyond those offered by the program. Workforce Innovation and Opportunity Act funds will be used for supportive services when these services cannot be obtained from a One-Stop partner or community agency.

All needs identified for supportive services will be documented in the ISS, EF, and the ATLAS file. All referrals to other agencies as mentioned above will be documented as well. Follow-up activities will ascertain whether supportive services are received. Identifying the need for and coordinating access for supportive services will be ongoing throughout the duration of the program.

h. Adult Mentoring for At Least 12 Months:

Adult mentoring will be offered as part of the program. Volunteer mentors who are interested in youth advancement will be recruited from the local community to provide guidance and leadership that the participants might be lacking at home. Mentors for the in-school youth enrolled in the program will be coordinated with the Okaloosa County School District and the Walton County School District.

i. Follow-Up Services:

Youth Career Advisors will provide 12 months of on-going follow-up activities that will provide a variety of services and support for youth. Follow-up activities will be provided on all youth who exit the program at the 30-Day, 60-Day, 90-Day, 6-month, 9-month, and 12 month points. These services will be performed by the youth Career Advisor through a combination of approaches; and used depending on the method most appropriate. Services will include (but are not limited to) periodic counseling appointments, regular visits to worksites and help with work-related problems, in-school visits with guidance counselors and/or teachers (in-school youth), telephone contact, at-home visits (If approved by the Executive Director), and correspondence and mentoring activities, as appropriate. Youth will be encouraged to continue developing their careers through additional education and training, and shown how this will assist them in obtaining better paying jobs.

Follow-up activities will be documented in the form of counseling notes in EF and files in ATLAS. The ISS will be updated as necessary. Follow-up services will continue for 12 months following successful completion of a program component by the participants.

j. **Comprehensive Guidance and Counseling:**

Guidance and counseling will be on-going and integrated into the entire program, with the activity incorporated on the ISS. All information gathered will be used to enhance counseling activities based on each participant's ISS.

The CareerSource Okaloosa Walton Board has made it a priority to build the capacity to expand youth opportunities and work experiences within a comprehensive service strategy based on lessons learned while administering the program and other workforce programs around the state. In building its capacity the CareerSource Board will require to consider the following:

- (1) How to improve participants' employability skills through work readiness training;
- (2) Work with the private sector, in addition to the public sector, to provide more work experience opportunities for economically disadvantaged and disconnected youth in private sector employment; and
- (3) Strengthen activities that transition youth from subsidized work experiences into unsubsidized employment, career pathways, occupational skills training, or co-enrollment into the WIOA Adult Program.

WIOA Youth Program Design Considerations

As part of designing the CareerSource youth opportunities and work experiences throughout the year; and to ensure quality enrollments, the CareerSource Okaloosa Walton Board and Councils considered the following design elements:

- a. Focusing on Youth Most in Need;
- b. Focusing on Older Youth;
- c. Focusing on Out-of-School Youth;
- d. Focusing on Out Reach and Recruitment Strategies;
- e. Improving Eligibility and Intake Processes;

Using Technology to Aid Program Administration and Reporting.

Focusing on Youth Most in Need

The CareerSource Okaloosa Walton Board encourages staff to focus services on eligible youth most in need such as: out-of-school youth and those most at risk of dropping out; youth in and aging out of foster care; youth offenders and those at risk of court involvement; homeless and runaway youth; children of incarcerated parents; and youth with disabilities.

The hardest to serve youth, like dropouts and out-of-school youth, require additional time and assistance to attain positive outcomes as measured by the Workforce Innovation and Opportunity Act (WIOA) Youth common and statutory measures. Therefore, the CareerSource Okaloosa Walton

Board encourages staff to implement strategies that promote longer term services for these youth to prepare them for post-secondary education and/or the labor market.

Focusing on Older Youth

Regular WIOA formula funds require staff to serve youth 16 to 24 years old. Sometimes it is difficult to locate the older youth population, especially those without a high school diploma or GED and are unemployed or underemployed. Staff will focus on reaching out to this difficult youth population, including eligible veterans and their spouses.

Focusing on Out Reach and Recruitment Strategies

The CareerSource Okaloosa Walton Board has cited several strategies to improve outreach and recruitments efforts to the older youth population:

- a. Think beyond “youth” when designing and promoting youth activities given that many veterans and young adults have children and household responsibilities;
- b. Avoid alienating young adults by characterizing the summer component as only a youth program;
- c. Develop new partnerships or reframe old partnerships with organizations that already serve these young adults; and
- d. Implement strategies to differentiate services based on the unique needs of these older participants.

Improving Intake and Eligibility Processes

According to the Employment and Training Administration (ETA) lessons learned from the Recovery Act Youth Program in 2009, local areas have improved its eligibility process. During 2009 CareerSource had challenges managing an increased volume of youth and in processing and collecting adequate documentation from youth and parents. Using the ETA information, the CareerSource Okaloosa Walton Board and Councils adopted the ETA recommendations as strategies to improve eligibility processes, such as:

- a. Providing more training to less experienced staff members to prepare them for summer tasks if needed;
- b. Relying more heavily on experienced staff to perform eligibility determination; and
- c. Examining other possible strategies to maximize staff resources such as streamlining intake procedures through prescreening applications and coordinating with schools and social service agencies to determine youth eligibility.

Using Technology to Aid Program Administration and Reporting

CareerSource Okaloosa Walton also uses technology to provide online training and webinars as a way to reinforce information provided to support work readiness training offered to participants.

Where possible, staff will utilize creative and efficient approaches to program administration through the use of technology.

Ensuring Youth Preparation and Support

CareerSource Youth Program is to provide a quality experience for the youth in Okaloosa and Walton Counties. An experience that will prepare them to acquire the skills and experience needed to transition into the labor market and obtain and maintain employment leading to a self-sufficient wage. To make this journey successful, the CareerSource Okaloosa Walton Board requires staff emphasis on the following areas:

- a. Work Readiness Training and Other Non-Worksite Activities
- b. Focus on Career Pathways
- c. Measuring Work Readiness
- d. Academic and Occupational Linkages
- e. Supportive Services

Work Readiness Training and other Non-Worksite Activities

The CareerSource Okaloosa Walton Board requires staff to integrate work experiences with related work readiness training, academics, occupational skills training, and/or leadership development as a year-round focus. Work readiness training is one of the most useful aspects of the CareerSource Youth Program. When implementing work readiness training, staff are encouraged to consider the following strategies to maximize the impact of work readiness and related training:

a. Training Design Components

The CareerSource Youth Program model includes these training design components:

- (1) Group orientations that communicate the overall benefits of a work experience, provide program expectations for work behavior, address any outstanding procedural questions from youth prior to the start of the program, and are interactive and motivational;
- (2) Work readiness training prior to worksite placement that is engaging, focuses on the foundation skills desired by employers, lasts at least one week with the length of time dependent on participants' needs, and ensures youth are adequately prepared for their work experience;
- (3) Onsite group or individual orientation by the employer on the first day of worksite placement to introduce youth to the worksite, and review expectations outlined in the worksite evaluation; and
- (4) Ongoing training integrated throughout the work experience that continues a few hours each week in combination with the work experience. The Region is looking at ways to better incorporate this element.

b. Training Content Areas

Work readiness topics focus on training content areas, such as:

- (1) Foundation skills such as communication skills, teamwork, decision making, problem solving, conflict resolution, work habits, customer service, responsibility, appearance, integrity, leadership, and time management;

- (2) Jobseeking skills such as portfolio building (resumes, cover letters, references), job applications, entrepreneurship, interviewing, networking, and transition planning into unsubsidized employment opportunities;
- (3) Career planning including career assessments and options for continued education;
- (4) Financial literacy such as budgeting, use of credit, opening of bank accounts;
- (5) Industry specific training relevant to the work experience; and
- (6) Basic skills including math, reading and computer literacy.

Measuring Work Readiness

Measuring work readiness is not a required activity for a year-round program; however, WIOA provides flexibility in designing work readiness programs. Career Advisors should continue to evaluate methods that will be an effective indicator of whether a youth is ready to be placed in a work experience opportunity or unsubsidized employment.

Career Advisors will continue to develop ways to enhance the effectiveness of the work readiness tool; and, look for additional tools to improved indicators of measuring work readiness. Some examples of work readiness tools to be researched Career Advisors include the following:

- a. *A worksite evaluation measuring performance in the workplace may be used to assess work readiness for the work readiness indicator.* An effective method of assessing work readiness is to require the worksite supervisor to observe and evaluate workplace performance.
- b. *This worksite evaluation may be conducted by the employer.* Using this tool the employer will be responsible for assessing performance; and Career Advisors will assist the employers in order to make the process as simple and seamless as possible.
- c. This tool focuses on attaining a satisfactory level of workplace proficiency as opposed to a measurable increase or gain. The attainment of proficiency or competency in the foundation and worksite-specific skills necessary to be successful in the workplace should be determined by the employer and should be based on the attainment of work behaviors outlined in the worksite evaluation tool. This tool should clearly state the overall criteria necessary to achieve workplace proficiency. For example, worksite evaluation tools could state that work readiness proficiency can only be attained after: a) the supervisor indicates satisfactory performance; and b) a minimum numerical score for determining proficiency is achieved.
- d. *This tool should measure work readiness skills most desired by employers.* This includes universal foundation skills such as work habits/professionalism (i.e., attendance, punctuality, attitude), teamwork/collaboration, communication skills, and critical thinking/problem solving. In addition, the tool should allow for flexibility to include industry or job specific skills as determined by the employer.

Academic and Occupational Linkages

CareerSource Okaloosa Walton Board believes it is appropriate that academic learning be directly linked to work experience for each youth. The CareerSource Okaloosa Walton will continue to link academic learning to work experience opportunities. The Career Advisors and the Business Services Team will continue to build relationships with employers and encourage them to provide work opportunities for youth. Every effort will be made to connect the youth to an occupation related to his or her career choice, including opportunities such as entrepreneurship training. When linking

academic and/or occupational learning to a work experience, the CareerSource Okaloosa Walton Board continues to encourage staff to assess the academic and occupational skills needs and interests of youth and determine appropriate training, especially training leading to credential attainment, combined with a work experience placement that supports the enhancement of identified skills.

Supportive Services

Under WIOA, the provision of supportive services is one of the 14 elements Career Source must make available to eligible youth. Supportive services may include transportation, child care, dependent care, housing, and other services that are necessary to enable an individual who is unable to obtain the services from other programs to participate in activities authorized under WIOA. Career Advisors have extensive experience working with disadvantaged youth and recognizes the need for additional support for youth to overcome their employment barriers. Supportive services most often is needed to help youth resolve transportation issues and to acquire appropriate work clothing and tools. The CareerSource Okaloosa Walton Board encourages staff to provide supportive services to populations in need, such as at-risk youth, in order to support their efforts to connect to and succeed in education, training and work experience opportunities.

Ensuring Quality Work Experiences

Another primary purpose of the CareerSource Youth Program is to provide youth with meaningful “work experiences” in a structured learning environment that takes place in a classroom setting and a workplace setting; and, to promote the development of good work habits and basic work skills. The Board believes that this goal can be best be accomplished by:

- a. Ensuring Quality Worksites
- b. Job Matching
- c. Worksite Monitoring
- d. Incorporating Green Work Experiences

Ensuring Quality Worksites

The CareerSource Okaloosa Walton Board encourages staff to seek employers that are committed to helping participants receive high quality experience and training as well as employers that are willing to work closely with the Career Advisors.

CareerSource Business Services staff are asked to recruit employers based on local workforce investment targeted and priority industries; and employers who are flexible in working with youth who have issues that may present barriers to employment. In addition, Career Advisors are asked to consider a combination of public sector, private sector, and non-profit work experiences for youth.

The ETA evaluation of youth programs found that while not necessarily appropriate for all youth, the private sector can be a good source of high quality jobs for many participants, particularly older youth with previous work experience. Reports have shown that by placing youth in private sector worksites, there is a greater chance for the work experience to lead to unsubsidized employment opportunities.

ETA recommends that CareerSource Okaloosa Walton Board place a strong emphasis on the orientation and preparation of worksite supervisors. To this end, the CareerSource Okaloosa Walton Board requires youth staff to formalize worksite agreements for each youth with worksite supervisors prior to youth beginning their work experience. Worksite supervisors will be fully briefed on the program's elements, mission, and goals. Job descriptions created by the employer for participants ensure that expectations on the part of the employer are the focus of the work experience. In addition, having employers participate in an orientation and provide input on the development of the work experience, and serve as onsite mentors is sure to improve the experience of both employers and youth.

Job Matching

CareerSource Okaloosa Walton Youth Program requires the Career Advisors to make an effort to match worksites with participants' personal and professional interests and goals. The CareerSource Okaloosa Walton Board agrees with this philosophy and believes that a well thought-out and planned match can maximize the likelihood that a youth has a meaningful work experience. Based on the variety of jobs available, every effort will be made to connect the youth to an occupation related to his or her career choice. The CareerSource Okaloosa Walton Board and Councils have adopted four key considerations for staff when matching youth to worksites:

- a. The youth's personal interests expressed through their application, orientation, or meetings with staff;
- b. Direct employer feedback after a formal interview;
- c. The youth's age, experience, and skills; and
- d. Transportation needs or other logistical issues.

Worksite Monitoring

Worksite monitoring is an important component of employment or a work experience program to ensure a meaningful work experience for youth as well as to secure a quality worksite. The CareerSource Okaloosa Walton Board requires ongoing monitoring/oversight through in-person visits as essential to ensuring high-quality experiences and heading off problems between worksite supervisors and youth before they become serious.

The CareerSource Okaloosa Walton Board encourages the CareerSource Program Manager to dedicate appropriate staff to monitor employers and worksite activities. CareerSource Worksite Monitors will work to maintain on-going contact with employers to provide support and technical assistance. In addition, Career Advisors work to ensure that worksite agreements are upheld, adequate supervision and quality mentoring are provided to youth, and worksites are in compliance with workplace safety and child labor laws.

The CareerSource Okaloosa Walton Board believes that having dedicated staff to monitor and work with youth is valuable in assessing the quality of the work experience and measuring youth progress throughout work experience. Career Advisors work to ensure youth are receiving mentoring, are safe and productive, and are achieving success in their placement. Proper and ongoing monitoring can ensure that if problems exist or if the worksite is not a good match for the youth or the employer, staff will have time to effectively address the issue or place the participant in an alternative worksite activity, if appropriate.

Incorporating Green Work Experiences

The CareerSource Okaloosa Walton Board encourages staff to expand opportunities for youth in the emerging green industry. Career Advisors are encouraged to develop a variety of opportunities that expose youth to green jobs. These may include: offering opportunities for youth to receive industry-recognized certifications, occupational skills training in green technology, materials and building techniques, and training courses on green career paths provided by local community colleges. The Career Advisor may coordinate with the public housing authority to do energy audits if appropriate; and/or explore opportunities for youth to receive college credits for exploration of water quality jobs.

Ensuring Transitional Opportunities beyond Work Experience

This component places focus on the following areas:

- a. Transitioning Older/Out of School Youth beyond Work Experience
- b. Work Opportunity Tax Credit adds Transition Incentive for at-risk Youth

Transitioning Older/Out-of-School Youth beyond Work Experience

For older youth and out-of-school youth who are not returning to school following a subsidized work experience, The CareerSource Okaloosa Walton Board encourages staff to work to transition youth into unsubsidized employment, education, training opportunities, or co-enroll them into the WIOA Adult Program. Additionally, the Board staff may test other transitional job models that combine short-term subsidized work experience with support services and career counseling; and explore new and innovative strategies for out-of-school youth. For example, the CareerSource Okaloosa Walton Board will increase paid and unpaid work experience opportunities year-round for out-of-school youth.

Some examples of transition strategies staff may pursue include:

- a. Forming work experience partnerships with business, education, and training institutions, and partner agencies that can continue to assist young adults beyond the work experience;
- b. Hiring program staff who are specifically assigned to connect young adults to transitional opportunities based on their individual interests and needs;
- c. Allocating time in work readiness workshops to promote speakers from local business and educational institutions; and
- d. Holding career transition workshops or related work fairs following the conclusion of the work experience;
- e. Partner with Vocational Rehabilitation for transitioning experiences for youth with disabilities; and
- f. Develop On-the-Job Training opportunities for selected, older youth.

Unsubsidized Employment

Many youth, particularly older/out-of-school youth, aim to directly transition from subsidized to unsubsidized employment. Prior to a youth completing a work experience, utilizing local labor market information, Career Advisors should identify employers with greater potential to hire youth into unsubsidized employment. The ETA evaluation found that a number of local areas reported that private sector employers were more likely to hire youth into unsubsidized positions and that private sector employers can offer high-quality jobs, particularly for older youth with greater work experience.

Therefore, the CareerSource Okaloosa Walton Board continues to encourage staff to expand engagement efforts to private sector employers, thereby increasing unsubsidized employment opportunities.

Education

For out-of-school youth, a work experience can provide a potential path back to education. Through work experiences as well as career mentoring provided by employers, youth are exposed to the skills and education needed to achieve their career goals. This may reinforce the importance of earning secondary and post-secondary credentials. The CareerSource Okaloosa Walton Board encourages staff to link work experiences with opportunities that expose youth to educational pathways. The CareerSource Okaloosa Walton Board also encourages staff to partner with local colleges to explore the possibility of providing integrated work and training experiences that increases the exposure of youth to higher education including the opportunity to earn college credits. A strategy that may be considered is to use academic training to address basic skill deficiencies or stationed staff at partner schools to help promote the return of out-of-school youth.

Occupational Skills Training

Moving from a work experience to occupational skills training can be a natural transition for youth. The CareerSource Okaloosa Walton Board encourages staff to partner with regional occupational training programs, adult education programs, and local colleges to enroll older youth in programs that have successful completion and high placement rates for serving this population of youth. Training areas can include, but are not limited to: allied health, solar installation, aviation mechanics, customer service, welding and diesel mechanics, information technology, and topics related to science, technology, engineering, and math occupations. Occupational skills training should result in the attainment of employer/industry recognized credentials that promote career pathways. Training should be related to occupations listed on the Regional Targeted Occupational List (RTOL).

Registered Apprenticeship

Pre-apprenticeship programs can include summer employment opportunities and work experiences that provide an introduction to the skills and knowledge required to be eligible for registered apprenticeships. The CareerSource Okaloosa Walton Board encourages staff to look for opportunities that transition youth from pre-apprenticeship programs into registered apprenticeships. Through partnerships with schools, employers, labor organizations, registered apprenticeship program sponsors and state apprenticeship offices, staff should work collaboratively to determine how best to coordinate these efforts.

Co-Enrollment in WIOA Adult Services

Older youth who meet the eligibility criteria for the WIOA Adult Program can co-enroll in both the WIOA Youth and Adult programs including both WIOA-funded services. WIOA regulations at 20 CFR 681.430, states that individuals who meet the respective eligibility requirements may participate in adult and youth programs concurrently. If such concurrent enrollment occurs, expenditures must be tracked separately by program.

Work Opportunity Tax Credit adds Transition Incentive for at-risk Youth

The Work Opportunity Tax Credit (WOTC) is a Federal credit available to private for profit employers who hire eligible participants from particular target groups into unsubsidized employment. The WOTC is a potential incentive for employers to hire youth into unsubsidized, permanent employment following the completion of a work experience or summer job. CareerSource Staff are encouraged to promote the awareness, benefits, and execution of the WOTC through multiple strategies that may include the use of promotional materials, employer outreach, and administrative assistance to employers with the WOTC application process.

(1) Provide a description of 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) to support regional economic growth and economic self-sufficiency (WIOA §108(b)(1)(E)).

CareerSource Okaloosa Walton's Mission is to ensure that every citizen has the opportunity and skills necessary to engage in meaningful employment throughout Okaloosa and Walton counties, and that every business has access to educated, and prepared employees that meet their needs

The CareerSource Okaloosa Walton plan parallels the Florida’s strategic vision for WIOA implementation and will be realized by accomplishing these three goals:

- Enhance 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 Okaloosa and Walton citizens 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.
- Promote accountable, transparent and data-driven workforce investment through performance measures, monitoring and evaluation that informs strategies, drives operational excellence, leads to the identification and replication of best practices and empowers an effective and efficient workforce delivery system.
- Improve career exploration, educational attainment and skills training for in-demand industries and occupations for Okaloosa and Walton Counties youth that lead to enhanced employment, career development, and credentialing and post-secondary education opportunities.

Successful workforce investment models for out-of-school youth include pairing secondary education with work-based learning opportunities and post-secondary exposure. This provides career pathway development while the youth is in school. In-school youth are able to participate in work based learning opportunities such as subsidized work experience, job shadowing opportunities, work-place tours etc. to assist in the development of their career plan.

Successful workforce investment models for out-of-school youth include re-engaging disconnected youth who have dropped out of school, or obtained their high school diploma or equivalent. Out of school youth are exposed to post-secondary opportunities such as occupational skills training, two-year and four-year degree programs and the opportunity to participate in work based learning opportunities to determine their career interest. Youth create a career plan based on their desired career pathway and are given the tools and resources necessary to accomplish career goals.

(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.

Industry Certifications have been cited by businesses as clear evidence of an applicant or employee’s ability to perform.

Public education is responding to this message from businesses and is redesigning career education to award not only a high school diploma, GED, or educational degree but to also award industry recognized credentials to indicate the skill level of job seekers. Ideally, the successful job applicant has earned the educational degree, industry-recognized credentials, and the nationally recognized worker readiness credential.

The Florida Career and Professional Education Act (CAPE) distinguishing features include a requirement that all Academies be tied to national industry certifications. CAPE was created to provide a statewide planning partnership between business and education communities, to expand and retain high-value industry, and sustain a vibrant state economy. This emphasis on industry certifications has had a huge impact on Adult Training in the Region as well. Armed with these qualifications, job applicants will be successful in gaining employment and businesses will remain competitive in the regional, national, and international market.

Local employers have repeatedly cited the need for worker readiness skills for entry-level workers. Businesses have consistently provided feedback on lack of worker readiness skills as the number one cause for involuntary terminations. This lack of worker readiness skills also negatively impacts an employee’s chance for advancement and promotion. Businesses have repeatedly cited the need for entry level workers to have the soft skills necessary to be productive and to grow and develop for higher level positions within the company. Because of this expressed need and concern, the CareerSource Okaloosa Walton Board aggressively promotes the “Ready to Work” credentialing to businesses, job seekers, and currently employed workers and conducts scheduled applicable workshops for soft skills training.

(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.

Historically, CareerSource Okaloosa Walton has been a high-performing board and expects to continue this high level of performance under WIOA. Internal quality assurance monitoring of all programs and processes is conducted on a minimum bi-annually. CareerSource Okaloosa Walton management also conducts frequent monitoring and review of processes, services, and performance for continuous improvement purposes.

Customer satisfaction surveys will continue to be promoted and available on the CareerSource Okaloosa Walton website to provide all customers (job seekers, businesses, staff, community agencies, general public, etc.) the opportunity to provide feedback, and to raise awareness regarding any deficiencies and/or needs. CareerSource Okaloosa Walton management staff review these completed surveys and take action as appropriate.

All applicable CareerSource Okaloosa Walton front line staff members receive a minimum of 15 hours of continuing training annually to ensure that staff skills remain current and relevant.

(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.

The full service and satellite one-stop centers have been equipped with technology to assist customers with disabilities to access services. The full service job center hosts a Disabled Veterans Outreach (DVOP) unit. CareerSource Okaloosa Walton staff are culturally and ethnically diverse and dedicated to upholding non-discrimination standards. Representatives from Vocational Rehabilitation (VR) attend our Board meetings regularly and provide advice and technical assistance as requested. We are currently have VR in our office. We are currently developing a manual with a list of all partners and the services they provide. This will assist with referrals as needed to all customers which will include special populations.

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

CareerSource Okaloosa Walton visions and goals are ever changing and evolving based upon current labor market and customer needs. It is driven by the economy and our local employers as well as future employment initiatives. The CareerSource Okaloosa Walton Board members and staff are involved in community initiatives and organizations and bring that expertise to our local operations and services which shape our vision and goals. The local areas vision and goals has been a long process that has transpired over many years. The vision and goals are periodically reviewed to ensure alignment with the local community at their regularly scheduled Board of Directors meeting and sub-Committees, i.e. the Business Competitiveness Council.

(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)).

The CareerSource Board will ensure its goals supports the achievement of the federal performance measures, economic growth, and self-sufficiency in the region by making a commitment to transparency and maintaining the highest level of standards across all workforce programs. The CareerSource Board is committed to having a living wage for all employees; and, to providing a qualified, educated, reliable, and skilled workforce to meet the needs of employers throughout the region.

The CareerSource Board has adopted pro-growth objectives that will ensure the accomplishment of it longer term goals to promote:

- The achievement of the federal performance measures;
- Long term economic growth; and
- A Self-sufficient wage for all employees in Okaloosa and Walton Counties.

The pro-growth objectives below were adopted by the CareerSource Board and will ensure economic growth in Okaloosa and Walton Counties:

- Ensure alignment of regional workforce, education, and economic goals.
- strengthen ties with local education agencies for the school districts, Community Colleges, and University to ensure academic success, increase graduation rates, increase number of skilled and credentialed graduates, and promotion of a continuum of education through life-long learning.
- Increase the Workforce Development investment in Economic Development through stronger ties, higher-level membership and participation with the Okaloosa County Economic Development Council, the Walton County Economic Development Alliance and regional economic development initiatives to ensure needs of existing businesses are being met.
- Establish the CareerSource Board as the recognized convener and facilitator for solving workforce issues in order to meet the needs of businesses, job seekers, employed workers, and the community for stable economic growth.
- Ensure the voice of business is the driving force for designing all services for workforce development.
- Ensure the competitiveness of local businesses not only for employee recruitment but also employee retention through promotion of training for the employed workers through local and state resources for incumbent workers.
- In collaboration with economic development agencies, identify targeted industries with emphasis on improving the pipeline for the future workforce as well as need for upgrade training of existing workforce.
- Continue to reduce the number of individuals with dependent children who need to rely on Temporary Assistance for Needy Families by providing effective programs and services designed to achieve employment and self-sufficiency.
- Elevate and actively promote the vital role of Career Education as a viable and attractive choice for secondary students to develop a career path that includes a continuum of life-long learning and industry recognized credentials.

The CareerSource Board's goals and pro-growth objectives will continue to be reviewed and revised as needed locally to ensure continued alignment with Florida's Strategic Plan.

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

CareerSource will use the statistical model that is still under development by the federal departments of education and labor, and CareerSource Florida. Consideration will be given to the state and local economic factors including unemployment rates, industry sectors, and characteristics of participants entering the program (e.g., work history, work experience, educational/occupational skills attainment, literacy levels, disability status, etc.). The core measures include:

- Percentage of participants in unsubsidized employment during second quarter after exit.
- Percentage of participants in unsubsidized employment during fourth quarter after exit.
- Median earnings of participants during second quarter after exit.
- Percentage of participants who obtain a postsecondary credential or secondary school diploma within 1 year after exit.

- Achievement of measureable skill gains toward credential or employment. And,
- Effectiveness in serving employers (To be determined by United States Department of Labor (USDOL) and United States Department of Education (USDOE)).

CareerSource Okaloosa Walton will use the **negotiated** local levels of performance displayed in the chart below (**Performance Goals (100%)**) for the federal performance goals:

 		
CareerSource Okaloosa Walton Performance WIOA Goals for Program Year 2017 – 2018		
Adults/ Dislocated Worker/ Youth/ Wagner-Peyser	Performance Goals (100%)	Performance Goals (90%)
Adults Measures:		
Employment Rate: Employed 2 nd Quarter After Exit	89.00%	80.1
Employment Rate: Employed 4 th Quarter After Exit	85.00%	76.5%
Median Wage 2 nd Quarter After Exit	\$7,850.00	\$7,065.00
Credential Attainment within 4 Quarters After Exit	Not Determined	Not Determined
Dislocated Worker Measures:		
Employment Rate: Employed 2 nd Quarter After Exit	83.00%	74.00%
Employment Rate: Employed 4 th Quarter After Exit	79.00%	71.00%
Median Wage 2 nd Quarter After Exit	\$6,850.00	\$6,165.00
Credential Attainment within 4 Quarters After Exit	Not Determined	Not Determined
Youth Measures:		
Title I Youth Education and Training Rate: *****Employed 2 nd Quarter After Exit	76.00%	68.40%
Title I Youth Education and Training Rate: *****Employed 4 th Quarter After Exit	69.00%	62.10%
Median Wage 2 nd Quarter After Exit	Not Determined	Not Determined

Credential Attainment within 4 Quarters After Exit	Not Determined	Not Determined
Wagner-Peyser Measures:		
Employment Rate: Employed 2 nd Quarter After Exit	61.00%	54.90%
Employment Rate: Employed 4 th Quarter After Exit	63.00%	56.70%
Median Wage 2 nd Quarter After Exit	\$4,850.00	\$4,365.00
Credential Attainment within 4 Quarters After Exit	N/A	N/A

(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)).

CareerSource Okaloosa Walton measures fiscal performance based upon several fiscal requirements. These include our Annual Independent Audit conducted by an outside firm; the Fiscal Monitoring conducted by DEO; our adherence to all required percentages outlined by the State. All required fiscal percentages and audits are reviewed with the CareerSource Okaloosa Walton Board of Director and Finance Committee at the applicable regularly scheduled meetings.

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

Definition of Self-Sufficiency: The CSOW Self-Sufficiency for employed workers, adults and dislocated workers, are those earning \$16.71 and above; and for TANF participants those earning \$15.50 and above.

COORDINATION OF SERVICES

- (1) Coordination of programs/partners: Describe how individualized career services are coordinated across programs/partners in the one-stop centers, including Vocational Rehabilitation, TANF and Adult Education and Literacy activities. Specify how the local area coordinates with these programs to prevent duplication of activities and improve services to customers (TEGL 3-15).**

CareerSource Okaloosa Walton establishes and maintains communication and information at each of the Board of Directors meetings. In addition, exchange of program services with community partners are on-going scheduled via joint meetings, workshops, staff training, and advisory councils. CareerSource Okaloosa Walton is instrumental with coordination and implementation of individualized career services with identified program service partners.

The joint communications maximize resources within the region and ensure that all programs are aware of each other's services and prevent duplication. CareerSource Okaloosa Walton has long standing relationships with community partners such as Vocational Rehabilitation, TANF, Adult Education and Literacy Services. Customers are asked to sign a "Release of Information" so that information can be exchanged between One-Stop Career Center staff and these agencies, to allow for coordination of efforts and prevent duplication of services.

CareerSource Okaloosa Walton management and career advisors receive cross training and on-going information regarding all partner services within the one-stop, and agency services within the local area, that provide support to address the barriers of the local workforce. CareerSource Okaloosa Walton customers are provided with referrals to community agencies as appropriate to address and assist them in overcoming barriers, and to assist customers in accessing needed services.

- (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 region (or planning region) in which the local area is located, and promotes entrepreneurial training and microenterprise services (WIOA §108(b)(5)).**

CareerSource Okaloosa Walton is active on our local and regional economic development agency's boards and committees. This active involvement ensures that our services, staff and participants are seen as solutions to the economic development challenge. The CareerSource Okaloosa Walton Executive Director holds a leadership role with the Okaloosa Economic Development Council; Florida's Great Northwest; and is supportive of the Walton County Economic Development Alliance.

CareerSource Okaloosa Walton also is supportive and involved with the activities of the Florida Veterans programs (Entrepreneurship) and Okaloosa Economic Development Council and Gulf Power. CareerSource Okaloosa Walton continues to support entrepreneurial development efforts throughout the region.

Florida's Great Northwest represents 12 Counties in the Florida Panhandle. Local Workforce Development Boards 1 – 4 are actively engaged in the planning process for this 12 county economic development marketing agency.

(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)).

CareerSource Okaloosa Walton works very closely with our education and economic development partners. CareerSource Okaloosa Walton's Executive Director, Chief Operating Officer, and Business Services Team are involved in industry sector advisory councils tied to secondary career academies and nationally recognized industry certifications that lead to post-secondary degrees and certifications.

CareerSource Okaloosa Walton Executive Director meets with our economic development partners when asked so that interactions can occur between local businesses and/or new businesses looking to locate within our two county areas.

CareerSource Okaloosa Walton partners with Okaloosa and Walton County Schools, Northwest Florida State College (NWFSO), Northwest Florida Manufacturing Council (NWFOC), the Panhandle Job Fair Foundation. CareerSource Okaloosa Walton is a founding member of the Panhandle Job Fair Foundation.

The Panhandle Job Fair began in the spring of 1993 to primarily assist military service members seeking employment opportunities after completing their military careers. It was later expanded to include military spouses and the general public. The Panhandle Job Fair attracts companies nationwide who are seeking well-qualified, educated, and experienced individuals for employment opportunities worldwide. The continued success and growth of the Panhandle Job Fair is based on finding high-quality companies and well qualified job seekers, while keeping costs at a minimum. It attracts over 100 companies and averages 1,000 jobseekers at each fair.

In a continuing response to the business community to secure the "skilled workforce", CareerSource Okaloosa Walton and Okaloosa and Walton School Districts in partnership with the Okaloosa Economic Development Council and the Walton Economic Development Alliance have implemented a program entitled "Educate the Educators" (EtE). The purpose of this program is to provide to K-12 educators local labor market information. Labor Market Information (LMI) is described as the body of knowledge that reports information on the number of people employed or unemployed, unemployment rates, average wages, population, income, occupational projections, and other economic variables. At the request of one of the local employer EtE participants, this event will be titled EtE Plus One – adding the invitation for a student to join the event.

(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 Okaloosa Walton is a member of the Okaloosa-Walton Transportation Planning Organization and the Okaloosa County Transit Cooperative.

The Okaloosa-Walton Transportation Planning Organization (TPO) is the local, intergovernmental transportation policy board for Okaloosa and Walton counties in Florida. The board is comprised of local government officials who make decisions regarding transportation at the regional level. The

Okaloosa-Walton TPO is required by federal and state legislation to establish a continuing, cooperative, and comprehensive planning process. The TPO also works to increase safety, security, accessibility, mobility, and connectivity for people and goods. The TPO is made up of local government staff and other stakeholders.

The Okaloosa County Local Coordinating Board comprised of 18 state agency and community representatives of the transportation disadvantaged population, was created in 1990 to identify local service needs and to provide information, advice, and direction to the Okaloosa County Community Transportation Coordinator (CTC), Okaloosa Board of County Commissioners.

LWDA 02 Okaloosa Walton provides support services in the form of debit cards and bus tickets to our Welfare Transition program participants. In addition, bus tickets may be provided to our veteran populations on occasion to assist with job interviews and/or job search activities.

CareerSource Okaloosa Walton has excellent relationships with Goodwill Easter Seals, United Way and Catholic Charities, Caring and Sharing (and others) to understand services offered through those community based organizations and to provide information on the support services and transportation assistance that we provide. Referrals are made between organizations for various services dependent upon the specific needs of the participants.

The Executive Director of CareerSource Okaloosa Walton is also on the Board of Directors for the Early Learning Coalition. This interaction assists in ensuring subsidized childcare for not only Welfare Transition participants, but also the working poor, are not duplicated.

(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)).

Department of Economic Opportunity (DEO) partner programs (Wagner-Peyser, LVER, DVOP) are located on-site at CareerSource Okaloosa Walton's One-Stop Career Centers.

State Merit staff are co-located to ensure seamless delivery of services and program integration. Merit staff registers and updates Employ Florida registration information ensuring data validity. They also notify Veteran and Eligible Persons of Priority of Service, and refer appropriate customers to the Veteran's Unit if the Veteran signifies that significant barriers to employment are present. After completion of registration and/or validation, customers are referred to appropriate programs and resources to complete the one-stop interaction. DEO staff are available for one-on-one career counseling and resume coaching to offer the customer an improvement in their employment outlook. Employment Security Representatives are on-site to perform Reemployment Services and Eligibility Assessment (RESEA) Program services to assist all claimants receiving Reemployment Assistance Benefits in decreasing their time to gainful employment. DEO staff are integrated into the one-stop center along with WIOA and TANF/WT staff.

In addition the State of Florida Division of Vocational Rehabilitation and National Caucus on Black Aged have office space at the Fort Walton Beach CareerSource Okaloosa Walton Center to provide employment assistance to disabled and older job seekers. All partners are integrated into operations and function as part of the system as a whole.

- (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).**

Literacy barriers are identified by CareerSource Okaloosa Walton staff and identified customers are assisted in addressing/overcoming barriers to employment or training. Customers are administered the Test of Adult Basic Education (TABE) to determine their suitability for post-secondary education or job training. Those customers who do not achieve the scores needed to enter training, are referred to Adult Education/Literacy programs in the local area to assist the customer in achieving the required skill levels necessary to enter post-secondary training programs.

Customers are administered assessment instruments to determine their suitability and readiness for various career pathway activities. CareerSource Okaloosa Walton has existing relationships with providers of Adult Education and Literacy. CareerSource Okaloosa Walton will follow the state's lead in establishing Adult Education's role in one-stop support. Any applications submitted to the Board will be reviewed consistent with the requirements of Title II, Section 232.

- (7) (New) Reduction of Welfare Dependency: Describe how the local board coordinates workforce investment activities to help reduce welfare dependency, particularly how services are delivered to TANF and Supplemental Nutrition Assistance Program (SNAP) recipients, to help such recipients become self-sufficient. Additionally, describe the strategies the local area uses to meet CareerSource Florida's goal of reducing welfare.**

The Career and Youth Council has responsibility for the oversight of all adult and youth programming provided through the One-Stop Delivery System. In that regards, the Council focuses on strategies for targeted groups such as Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF)/Welfare Transition Program (WTP). The goal is to provide these populations with education, job skills training, and work readiness skills needed to attain and retain employment that will lead to increased wages and a reduction in welfare dependency.

CSOW Temporary Assistance for Needy Families (TANF) caseloads have fallen since the program was enacted in 1996. While the demographic characteristics of adults receiving benefits have been similar over time, the caseload has shifted, with the percentage of "child-only" cases rising slightly, while the percentage of single-parent and two-parent cases has fallen. Factors such as the local economy and the earned income tax credit (EITC) played a key role in the caseload decline, State and local policy has also had a substantial impact on caseload reduction. Specific TANF policies such as financial incentives, support services, sanctions, and time limits help explain changes in caseload exits and entries and overall caseload size.

7 CFR 273.7 (c) (5), states that each component of the State Agency's E&T program must be delivered through its statewide workforce development system, unless the component is not available through a local workforce system. To comply with this requirement all SNAP Program activities are administered by the Department of Economic Opportunity (DEO) through the statewide

workforce development system operated by CareerSource Boards (CSBs) through a One-stop Deliver System.

Similarly to TANF, Factors such as the local economy and the earned income tax credit (EITC) played a key role in the SNAP caseload decline, State and local policy has also played a significant role on the impact of caseload reduction.

CSOW's Supplemental Nutritional Assistance Program is designed to provide SNAP recipients who are able bodied adults without dependents (ABAWDs) with the education, training, support services; and skills needed to become self-sufficient through employment.

The Career and Youth Council has placed great emphasis on establishing and maintaining an environment that ensures continuous improvement in a seamless delivery of services through the One-Stop system. The Council also places great emphasis on developing and using strategies that will achieve CareerSource Florida's goal of reducing welfare dependency. To this end, the council has adopted the following welfare to work pro-growth strategies to improve the lives of the SNAP and Welfare Transition customers, and lead to a reduction in caseloads.

- SNAP and Welfare Transition Career Advisors provide ongoing assessment of customer's progress toward self-sufficiency that include assessment of barriers affecting progress toward self-sufficiency. Changes in activities and hours of participation are made in accordance with the need for attaining successful transition from welfare programs to self-sufficiency.
- SNAP and Welfare Transition customers who do not have a high school diploma (or equivalent) and whose English-speaking skills need improvement are referred for the appropriate services. By obtaining the required education and skills for today's workplace, welfare dependence will decrease, and opportunities will increase for high-skill and high-wage careers.
- Reduce the number of individuals with dependent children who need to rely on Temporary Assistance for Needy Families by providing effective programs and services designed to achieve employment and a self-sustaining family wages.
- Integrate SNAP and Welfare Transitional services into the full menu of CareerSource services provided through the CareerSource One-Stop System to maximize the numbers and percentages of successful transitions from welfare to self-sufficiency.
- Provide educational opportunities for SNAP and Welfare Transition "potential employees" needing vocational training and remediation of basic skills in order to be hired.
- Subject to the availability of funding, support services will be provided as needed to allow Welfare Transition participation in allowable work activities. The participants are briefed that support services are not an entitlement and may be provided only as funding permits. All support services provided to participants will be documented in the One-Stop Service Tracking (OSST) and other data management systems as directed by the CareerSource Board.

- Support services are intended to assist the Welfare Transition participant in participating in required allowable activities that are designed to lead to employment and self-sufficiency. Supportive Services may include, but are not limited to such items as transportation assistance, automotive repairs in some limited instances, driver's license fees, work-related clothing and/or tools, books, emergency housing assistance, emergency child care, short-term individual or family counseling necessary for successful participation in assigned activities, and not covered by Medicaid or other funding sources, medical second-opinions for deferred customers, and other allowable costs essential for participation in allowable and countable activities.
- SNAP participants are referred to community partners as needed for support services.

(8) Cooperative Agreements: Describe the 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 (29 U.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 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 Okaloosa Walton partners with the Division of Vocational Rehabilitation and the Division of Blind Services through Memoranda of Understanding. The purpose of the MOU is to facilitate cooperative workforce training and employment placement efforts. The goal for the MOU and the work undertaken by all three entities is to facilitate cooperation, collaboration and coordination including planning, referrals and preventing duplication for the advancement of our mutual clients. (See Attachment).

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)).

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

All of the required WIOA partners are included in the CareerSource Okaloosa Walton Workforce Development System.

The CareerSource Okaloosa Walton Board oversees the local Workforce Development System that includes one comprehensive One-Stop Center located in Ft. Walton Beach in Okaloosa County; a satellite office located at Eglin AFB, Florida, Okaloosa County; and, a satellite office located in DeFuniak Springs in Walton County; and a Mobile Business Center with 13 work stations available to serve customers located in the rural areas of both counties.

The CareerSource Okaloosa Walton Board was approved by the CareerSource Florida Board to operate a direct service model and provide Career Services for WIOA adults and dislocated workers; and WIOA youth programs.

The Career Council provides the vision, guidance, direction, and evaluation of performance of the CareerSource Okaloosa Walton One-Stop System. The Career Council also provides oversight and analysis of performance of the system and its partners. Chaired by a private sector Board member, the Career Council provides continual feedback and recommends policy changes or new policy development to the full CareerSource Okaloosa Walton Board of Directors.

The CareerSource comprehensive center is managed by a CareerSource Okaloosa Walton Center Coordinator who reports directly to the CareerSource Okaloosa Walton Chief Operating Officer, who reports to the Executive Director. The Department of Economic Opportunity has designated state staff to provide Wagner-Peyser and Veterans Services. MOU's outline the terms and conditions for providing services through the Workforce Development System by other One-Stop partners. Please see the attached MOUs with our partners.

The Chief Operating Officer is responsible for the integration of all services provided as part of the One-Stop System. The Monthly Managers Dashboard Report includes performance of all programs provided through Wagner-Peyser funding, WIOA, Welfare Transition, Veterans, Military Spouse, Individuals with Disabilities, and other special populations.

As indicated below, five of the six core programs are co-located in the Career Centers and pay a proportionate amount of infrastructure costs:

a. WIOA Title I - Adult Program

The WIOA Adult Program services include Career Services, Training Services and job placement assistance. Priority is given to recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills-deficient.

b. WIOA Title I - Dislocated Worker Program

The WIOA Dislocated Worker Program services target individuals who lost jobs due to plant closures, company downsizing, or some other significant change in market conditions. In most cases, eligible workers are unlikely to return to their occupations, and they must be eligible for (or have exhausted) unemployment compensation.

c. WIOA Title I - Youth Program

The WIOA Youth program services include the attainment of a high school diploma or its recognized equivalent, entry into postsecondary education, and individualized delivery of 14 types of career readiness opportunities.

d. WIOA Title II – Adult Education and Literacy Act Program (Adult Education or AEFLA)

The Adult Education and Literacy services include: adult education; workplace literacy and family literacy; English language acquisition activities; and integrated English literacy and civics education, workplace preparation activities, and integrated education and training.

Note: This core program is not currently co-located in the Career Centers and do not pay a proportionate amount of infrastructure costs.

e. WIOA Title III – Wagner-Peyser Act Program (As amended by WIOA Title III)

Wagner-Peyser, often referred to as basic labor exchange services, provides access to employment services to all job seekers including job search preparation and placement assistance services. Employers may receive general or specialized recruitment services through self-service or staff assisted job orders.

f. WIOA Title IV – Rehabilitation Act of 1973 Programs (Title I of the Rehabilitation Act of 1973, as amended by WIOA Title IV)

Division of Vocational Rehabilitation – Vocational Rehabilitation programs provide training services to help eligible individuals with disabilities become employed. The priority is competitive, fulltime employment. Depending on the individual's disability and functional limitations, however, other outcomes such as part-time

employment, self-employment, or supported employment are also appropriate. Services focus both on helping high school students plan as they prepare for transition to work, as well as delivery of a range of individualized adult services.

In addition to the six core programs, the following required partner programs are co-located in the Career Centers and pay a proportionate amount of infrastructure costs:

a. Temporary Assistance for Needy Families (TANF)/Welfare Transition Program.

Prior to 1996, states used welfare funds strictly to provide ongoing cash assistance so children in qualified families could be cared for in their own homes or the homes of relatives. Only by approval of a federal waiver were states able to develop programs that included training, employment services or support services with welfare dollars. With the passage of the 1996 legislation, Personal Responsibility Work Opportunity and Reconciliation Act (PRWORA), states were provided with increased flexibility to spend TANF dollars. The Act ended the welfare entitlement programs and introduced the TANF block grant. The TANF block grant was designed to provide states flexibility in designing and implementing ongoing cash assistance programs, self-sufficiency programs and pregnancy prevention programs. The TANF block grant is comprised of federal funds CareerSource uses to implement TANF programs, provide services and provide benefits that meet one of the four purposes of TANF.

According to federal legislation, CareerSource must use TANF funds to serve one of the [four purposes of TANF](#). CareerSource Okaloosa Walton must spend TANF funds in an effort to:

- (1) Provide assistance to needy families so that children may be cared for in their own homes or in the homes of relatives;
- (2) End the dependence of needy parents on government benefits by promoting job preparation, work, and marriage;
- (3) Prevent and reduce the incidence of out-of-wedlock pregnancies and establish annual numerical goals for preventing and reducing the incidence of these pregnancies; and
- (4) Encourage the formation and maintenance of two-parent families.

Depending on the availability of funds, the CareerSource Okaloosa Walton Board authorizes the use of TANF funds to operate special projects for eligible youth and adults.

b. Supplemental Nutrition Assistance Program (SNAP E & T)

Florida's Supplemental Nutritional Assistance Program (SNAP) is designed to provide SNAP recipients who are able bodied adults without dependents (ABAWDs) with the education, training, support services and skills needed to become self-sufficient through employment.

7 CFR 273.7 (c) (5), states that each component of the State Agency's E&T program must be delivered through its statewide workforce development system,

unless the component is not available through a local workforce system. To comply with this requirement all SNAP Program activities are administered by Department of Economic Opportunity (DEO) through the statewide workforce development system operated by the CareerSource Boards (CSBs) through the One-Stop Delivery System.

CareerSource Okaloosa Walton's SNAP E & T Program will serve all ABAWDs ages 18 – 49 in Okaloosa and Walton Counties. The CareerSource SNAP Program will focus on assisting ABAWDs in meeting their work participation requirements, in order to ensure continued program access for compliant individuals. In order for ABAWDs to meet work participation compliance, they must meet the following work requirements:

- (1) Work 20 hours per week (20 hours a week averaged monthly means 80 hours a month);
- (2) Participating in and complying with the requirements of a work program 20 hours a week;
- (3) Performing any combination of work and participation in a work program for a total of 20 hours per week; or
- (4) Participating in and complying with a workfare

CareerSource has Six Guiding Principles for the SNAP Employment and Training Program:

- (1) Focus on work attachment.
- (2) Balances the short-term goal of moving participants into immediate employment and the long-term goal of moving households to self-sufficiency.
- (3) Respond and adapt to the local economy.
- (4) Maximize collaboration and expertise of local partners.
- (5) Use measureable results to ensure program funds are used for efficient and effective components.
- (6) Uses communication skills that expand cooperation and respect for customers.

c. Trade Adjustment Assistance (TAA) Program.

The Trade Adjustment Assistance (TAA) Program was first established at the Department of Labor by the Trade Act of 1974, and has been amended several times. Individual workers who are members of the certified worker group apply for benefits and services at an American Job Center. Individual workers who meet the qualifying criteria may receive: job training; income support in the form of Trade Readjustment Allowances (TRA); job search and relocation allowances; and Health Coverage Tax Credit (HCTC) (as determined by the Internal Revenue Service (IRS)); and for workers age 50 and older, a wage supplement in the form of Reemployment Trade Adjustment Assistance (RTAA).

The TAARA 2015, title IV of the Trade Preferences Extension Act of 2015 (Public Law 114-27), was signed into law by President Barack Obama on June 29, 2015, and both amends and reauthorizes the TAA Program. The Trade Adjustment Assistance Reauthorization Act (TAARA) of 2015 restores the worker group eligibility and benefits established by the Trade Adjustment Assistance Extension Act of 2011 (TAAEA). The TAARA 2015 also authorizes the operation of the 2015 Program and continuation of the 2002 Program, the 2009 Program, and the 2011 Program through June 30, 2021.

CareerSource Okaloosa Walton Board will provide services for all eligible workers covered by a certification who are eligible for employment and case management services, including Basic Career Services and Individualized Career Services either through the TAA Program or through and in coordination with WIOA and Wagner-Peyser Programs.

The CareerSource Okaloosa Walton Board, Executive Director and Board staff understands the requirement that merit employees at the regional level should be designated as TAA program staff. The Chief Operating Officer is included as a member on the Rapid Response Team and will be able to ensure this requirement is in full compliance.

d. Jobs for Veterans State Grants (JVSG) Programs.

(1) Local Veterans' Employment Representatives (LVER) Program.

Under 38 U.S.C. 4104(b), the LVER's principal duties are to: (1) conduct outreach to employers in the area to assist veterans in gaining employment, including conducting seminars for employers; and, in conjunction with employers, conducting job search workshops and establishing job search groups; and (2) facilitate employment, training, and placement services furnished to veterans in a state under the applicable state employment service delivery systems.

(2) Disabled Veterans' Outreach Program (DVOP).

- a. Veterans And Eligible Spouses With Significant Barriers To Employment (SBE)
- b. DOL has directed that DVOP staff must *limit their activities* to providing services to eligible veterans and eligible spouses who:
 - (1) Meet the definition of an individual with a Significant Barrier to Employment (SBE) as defined in the paragraphs below, or
 - (2) Are members of a veteran population identified by the Secretary under 38 U.S.C. 4103A (a) (l) (C) as eligible for DVOP services, as explained in separate guidance from DOL.
- c. The following paragraphs describe the criteria for having a significant barrier to employment:
 - (1) An eligible veteran or eligible spouse is determined to have a SBE if he or she attests to belonging to at least one of the six criteria below:
 - (a) *A special disabled or disabled veteran, as those terms are defined in 38 U.S.C §4211(1) and (3); special disabled and disabled veterans are those:*
 - 1) *Who are entitled to compensation (or who, but for the receipt of military retired pay would be entitled to compensation) under laws administered by the Secretary of Veterans' Affairs; or*
 - 2) *A person who was discharged or released from active duty because of service-connected disability.*
 - (b) A homeless person, as defined in Sections 103(a) and (b) of the McKinney-Vento Homeless Assistance Act (42) U.S.C. 11302(a) and (b)), as amended;
 - (c) A recently-separated service member, as defined in 38 U.S.C. § 4211(6), who has been unemployed for 27 or more weeks in the previous 12 months;
 - (d) An offender, as defined by WIOA Section 3 (38), who is currently incarcerated or who has been released from incarceration;
 - (e) A veteran lacking a high school diploma or equivalent certificate; or
 - (f) A low-income individual (as defined by WIOA Section 3 (36)).

(2) Priority Category Veterans include veterans aged 18-24. This population is to be served by DVOP staff and includes any veteran ages 18-24.

(3) Other Allowable Categories. JVSG funds used by DVOPs to provide services to veterans with SBEs may also be used to provide services to the following populations:

(a) Transitioning Service Members (TSM):

- 1) Who have participated in the Transition Assistance Program (TAP) and are identified as having a SBE. The targeting of resources to this group is intended to facilitate their entry into the labor market early in their separation from military service.
- 2) TSMs that have participated in the TAP and are identified as in need of intensive services but do not have a SBE should be referred to a WIOA Dislocated Worker Career Advisor for services.

(b) Wounded Warriors: Recuperating in military treatment facilities or warrior transition units, in order to facilitate the employment assistance needed by members of this group.

e. Reemployment Assistance (RA) Program (Wagner Peyser)

Through the state's Reemployment Assistance program, individuals who have lost employment through no fault of their own and have earned sufficient wage credits may receive RA benefits if they meet initial and continued RA eligibility requirements.

CareerSource Okaloosa Walton administers a labor exchange system that has the capacity to meet the work test requirements of the state Reemployment Assistance system. In order to comply with the RA work test, a RA claimant must be able and available to accept suitable employment; and be actively seeking work. To ensure compliance with the state's RA program, CareerSource Staff will:

- (1) Inform the Department of Economic Opportunity's (DEO) staff if they become aware that a RA claimant fails to comply with the RA work test.
- (2) Report to DEO RA staff any issues they become aware of that could affect the claimant's RA benefits, such as inability to work, lack of transportation, or other availability issues.
- (3) Provide access to a computer or telephone in the Career Centers for individuals who want to file a claim for RA benefits or may be responding to a RA inquiry.

- (4) Provide RA claimants access to a telephone, fax machine, and a location within the Career Centers where the claimant can participate in a telephone RA appeal hearing, if necessary.
- f. Reemployment Services and Eligibility Assessment (RESEA) Program (Wagner-Peyser).

USDOL and participating states have been striving to address individual reemployment needs of UI claimants, and to prevent and detect UI improper payments, through the voluntary UI Reemployment and Eligibility Assistance Program since 2005. A new provision in the 2015 appropriation allows funds to be expended for both traditional UI Reemployment and Eligibility Assessments (REA) activities and for reemployment services. These activities are referred to collectively as the Reemployment Services and Eligibility Assessment (RESEA).

The following services are required for all RESEA participants and will be provided by CareerSource Okaloosa Walton staff as part of intensive one-on-one service:

- (1) Orientation: RESEA staff must provide an orientation about all of the CareerSource Okaloosa Walton services with particular emphasis on accessing available labor market and career information. This activity code should be manually entered and resulted in EF by the facilitator following the end of the orientation. Staff will use Activity Code: 101, Staff Assisted Orientation for this activity.
- (2) Initial Assessment: RESEA staff must conduct a one-on-one assessment interview with the RESEA participants to review their employability skills, strengths, weaknesses, and barriers. In addition to the assessment tools mentioned in this LOP, other tools may also be used such as Florida Ready to Work Credentialing Program, Kuder Journey, Provelt!, Barriers to Employment Success Inventory (BESI), etc. When using these assessments, staff should not set additional standards for participants to attain in order to be shown as successful completers. The only standards that may be used are those included with the assessment tool. Staff will use Activity Code 102, Initial Assessment for this activity.
- (3) Labor Market Information (LMI): RESEA staff must conduct a briefing on the Provision of Labor Market Information unique to the RESEA participant's experience, skills and desired occupation. Staff will use Activity Code 107, Provision of Labor Market Information for this activity.
- (4) Employability Development Plan: RESEA staff must assist the participants with developing an Employability Development Plan (EDP) unique to their challenges, skills, and goals discovered during the initial assessment. The EDP should be thorough and complete as it provides a road map for the participant to follow. Staff will use Activity Code 205, Develop Service Strategies (IEP, ISS, and EDP) for this activity.

g. Military Family Employment Advocacy Program (MFEAP).

The Military Family Employment Advocacy Program was established due to the recognition of the challenges that military families face on a daily basis, to include and not limited to frequent relocations, recurring deployments, and lengthy periods of separation. Florida legislature recognized these occurrences impact a military spouse's ability to gain job skills and maintain a career. The purpose of the MFEAP is to develop and provide outreach services to engage job seeking military dependents in CareerSource services and to help educate the workforce community about the unique employment barriers faced by military family members.

h. Senior Community Service Employment Program (SCSEP).

CareerSource Okaloosa Walton includes the Senior Community Service Employment Program (SCSEP) in both of the full services Career Centers. SCSEP is a community service and work based training program for older workers. The Program is authorized by the Older Americans Act, and provides subsidized, service-based training for low-income persons 55 or older who are unemployed and have poor employment prospects. Participants have access to both SCSEP services and other employment assistance through the CareerSource Okaloosa Walton One-Stop Delivery System.

i. Employment Network and Ticket-to-Work Program (Social Security Administration (SSA)).

The CareerSource Okaloosa Walton Board is an approved Employment Network (EN) and approved to operate the Social Security Administration (SSA) Ticket to Work Program. The Ticket to Work Program is a supportive, active, and resource rich path to employment for SSI and SSDI recipients. The Region offers the full menu of re-employment related services to SSI and/or SSDI beneficiaries who want to join or return to the workforce.

Individuals who enroll in the Ticket to Work Program must:

- 1) Be 18 to 64 years old
- 2) Be Receiving SSI and/or SSDI Based on a Disability
- 3) Have a true desire and ability to return to work
- 4) Be motivated and capable of working on goals with Ticket to Work staff members
- 5) TTW provides a safety net to help SSI/SSDI recipients maintain benefits and work.

j. Disability Program Navigator.

CareerSource Okaloosa Walton has designated a Regional Disability Program Navigator (DPN) who oversees services addressing the needs of individuals with

disabilities. Each Career Center has a designated staff member as a resource for matters concerning disabilities. The focus of the DPN is to address the needs of individuals with disabilities seeking training and employment opportunities through the CareerSource One-Stop System. The DPN provides expertise and serve as a resource person to the workforce investment system for individuals with disabilities, including Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) disability and blindness beneficiaries. The Disability Program Navigator has expertise regarding the One-Stop partner programs and services

k. Division of Blind Services

Florida Division of Blind Services helps blind and visually impaired Floridians achieve their goals and live productive and independent lives. Our services cover all ages from babies to senior citizens. We also offer Employer Services, the Braille and Talking Books Library, and the Business Enterprise Program. We encourage you to explore our website and then contact your nearest DBS office to find out more about eligibility requirements and how we can help you achieve your goals.

l. Child Care Services.

(1) LWDA 02 enjoys close working relationship with the Okaloosa Walton Child Care Services. The LWDA 02 Executive Director serves on the WWCCS (ELC) Executive Committee.

(2) The mission of the WWCCS of the Coalition is to promote a collaborative school readiness and early childhood service system, to deliver an integration of cognitive, social/emotional and physical development experiences that increase children's opportunities for success.

(3) LWDA 02 supports the priorities of the WWCCS which are:

- (a) Increase child care capacity, as number of slots available for young children is severely limited.
- (b) Increase quality of subsidized school readiness services through training and technical assistance.
- (c) Utilize appropriate screening and assessment tools for subsidized child care in accordance with state statutes.
- (d) Increase outreach to unique populations, and increase community awareness of strategies for increasing child well-being.

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

At this time, there are no non-required partners in the local One-Stop Delivery System. Notification to the State will be provided if additional partners are included in the Center/s.

C. The LWDB, with the agreement of the chief elected official, shall develop and enter a memorandum of understanding between the local board and the one-stop partners. Please provide a copy of sector executed MOUs (WIOA §108(b)(6)(D)).

The CareerSource Okaloosa Walton Board with the agreement of the chief elected official has entered into Memoranda of Understanding (MOUs) between the local board and required One-Stop partners for the provision of seamless delivery of services and cost/resource sharing agreements.

The following required workforce programs are not administered by CareerSource Okaloosa Walton Board and require an MOU:

- Adult education and literacy activities authorized under title II of WIOA.
- The Vocational Rehabilitation program authorized under title I of the Rehabilitation Act of 1973.
- The Senior Community Service Employment Program (SCSEP) authorized under title V of the Older Americans Act of 1965.
- Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006.

The following required workforce programs are administered by the CareerSource Okaloosa Walton and there is no separate entity for which an MOU is required. These programs are:

- WIOA Title I - Adult Program.
- WIOA Title I - Dislocated Worker Program.
- WIOA Title I - Youth Program.
- WIOA Title III – Wagner-Peyser Act Program (Wagner-Peyser Act, as amended by Title III).
- Temporary Assistance for Needy Families (TANF)/Welfare Transition Program.
- Supplemental Nutrition Assistance Program (SNAP).
- Trade Adjustment Assistance (TAA) Program.
- Jobs for Veterans State Grants (JVSG) Programs.
- Local Veterans' Employment Representatives (LVER) Program.
- Disabled Veterans' Outreach Program (DVOP).
- Unemployment Compensation (UC) Program (Wagner-Peyser).

- Reemployment Services and Eligibility Assessment (RESEA) Program (Wagner-Peyser).
- Military Family Employment Advocacy Program (MFEAP).
- Employment Network and Ticket-to-Work Program (Social Security Administration (SSA)).
- Disability Program Navigator.

The CareerSource Board remains open to negotiation for new MOUs as new partners and new customer needs are identified. As potential partners are identified, negotiations will be held to determine if an MOU could facilitate access to needed services the CareerSource customers.

(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 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. Describe how the LWDB incorporates feedback received during consultations with local Independent Living Centers on compliance with Section 188 of WIOA (WIOA §108(b)(6)(C)).

In 2007, the Department of Labor (DOL) with input from the Social Security Administration (SSA) entered into cooperative agreements with the state level workforce system in 45 states, the District of Columbia, and Puerto Rico to implement the Disability Program Navigator (DPN) Initiative. CareerSource Okaloosa Walton volunteered to participate in the initiative. Because of the added value of the DPN to the Workforce Development System during the initiative, when it ended in 2010, the CareerSource Board of Directors agreed to sustain the DPN initiative and make it a permanent part of the One-Stop Delivery System in Okaloosa and Walton Counties.

The DPN is a critical component of the Workforce Development System in Okaloosa and Walton Counties; and is the Regional expert and single point of contact on all matters relating to the Americans with Disabilities Act. A primary purpose of the DPN in the One-Stop System is the formation of relationships across multiple programs that impact individuals with disabilities; and, establishing means of coordination on policy, service delivery, blending and braiding of funds, and other activities that improve opportunities for careers, and successful employment outcomes for individuals with disabilities.

The DPN reports to the Chief Operating Officer and is charged with the responsibility along with Quality Assurance Officer of ensuring the One-Stop operators and One-Stop partners complies with the Americans with Disabilities Act regarding physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities; including providing staff training and support for addressing the needs of individuals with disabilities.

The CareerSource DPN Initiative is designed to:

- a. Guide One-Stop staff in helping people with disabilities access and navigate the complex provisions of various programs that impact their ability to gain/retain employment.
- b. Develop partnerships to achieve integrated services, systemic change, and expand the capacity to serve customers with disabilities.
- c. Increase employment and self-sufficiency for Social Security beneficiaries and others with disabilities.
- d. Facilitate seamless and comprehensive services for persons with disabilities in the Career Centers. Serve as resources on SSA's work incentives and employment support programs and the provision of services through Work Incentives Planning and Assistance Projects (WIPA), Protection and Advocacy systems (P&As); and employment-related demonstration projects.
- e. Facilitate access to programs and services. Serve as a resource to the workforce development community to ensure the availability of comprehensive knowledge of Federal, State, local and private programs that impact the ability of persons with disabilities to enter and remain in the workforce.
- f. Facilitate linkage to the employer community. Develop linkages and collaborate on an ongoing basis with employers to facilitate job placements for persons with disabilities [facilitate access to employment opportunities].
- g. Conduct outreach to agencies/organizations that serve people with disabilities.
- h. Facilitate the transition of in-school or out-of-school youth with disabilities to obtain employment and economic self-sufficiency.

DPN as a Workforce Systems Change Agent:

- a. Improved access to One-Stop services through readily available assistive technology.
- b. Assist in development and implementation of a reasonable accommodation policy and procedure.
- c. Assist in building relationships with a specific collaborator, including negotiation of co-location and/or MOU.
- d. Advocate for increased access and use of Individual Training Accounts (ITAs) by job seekers with disabilities.
- e. Training on serving customers with disabilities as part of One-Stop new-hire orientation.

DPN as a Workforce Problem Solver:

- a. Identifying appropriate community resources for job seekers with disabilities to remove barriers to employment (i.e., training, transportation, housing, assistive technology needs, etc.).

- b. Working together with the WIPA Specialist to show customers how to use work incentives to reach employment goals.
- c. Finding the answers to questions that One-Stop staff have regarding the ADA or other disability-related topics.
- d. Providing consultation with employers on providing reasonable accommodations to employees with disabilities.

DPN as a Workforce Relationship Builder:

- a. Coordinating One-Stop orientations, tours, and Open Houses targeting the disability community.
- b. Regularly participating in community events, resource fairs and business roundtables as a One-Stop representative.
- c. Consulting with mandated and non-mandated partners regularly about accessibility, accommodations and other disability-related topics.
- d. Organizing or joining an interagency collaboration which focuses on accessibility, sharing of resources and/or improving employment outcomes for persons with disabilities.

DPN as a Workforce Resource:

- a. Being available to answer questions staff have on serving job seekers with disabilities.
- b. Offering guidelines to One-Stop staff on interacting with people with a wide range of disabilities.
- c. Presenting orientations on WIOA and One-Stop services to a wide variety of community service providers.
- d. Coordinating workshops in One-Stops on disclosure, reasonable accommodations, work incentives and job seekers' rights and responsibilities under the ADA.
- e. Offering information to the business community on hiring/retaining individuals with disabilities.

DPN as a Workforce Facilitator:

- a. Bringing together multiple partners who are working with one individual to foster a collaborative effort.
- b. Coordinating staff training on a variety of disability-related topics.

- c. Improving communication between the One-Stop and partners by educating both about their systems.
- d. Bridging the gaps between the business and human service communities by organizing forums for discussion.

Going forward, CareerSource will establish a partnership with the local/regional Independent Living Centers and incorporate feedback received during consultations regarding compliance with Section 188 of WIOA.

Ticket-to-Work

In 2009, the CareerSource Okaloosa Walton Board became an Employment Network (EN) for the Social Security Administration (SSA). The approval of CareerSource as an EN allows the CareerSource Board to operate the SSA Ticket to Work and Self-Sufficiency Program, which is the centerpiece of the Ticket to Work and Work Incentives Improvement Act of 1999.

This Ticket to Work program provides Social Security beneficiaries with disabilities more choices for receiving employment services. Under the Ticket to Work program the Social Security Administration issues Tickets to eligible beneficiaries who, in turn, may assign those Tickets to an EN of their choice to obtain employment services. Other services include: vocational rehabilitation services or other support services necessary to achieve a vocational goal.

CareerSource has responsibility for the coordination and delivery of appropriate employment services to those beneficiaries who have assigned their tickets to the CareerSource Employment Network.

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

The CareerSource Okaloosa Walton Board's vision for WIOA and the One-Stop Delivery System utilizing principles of universal design in its operations includes an integrated, job-driven public workforce system that links diverse talent to businesses. The CareerSource Board will continue to emphasize three hallmarks of excellence included in universal design:

- a. The needs of business and workers drive workforce solutions;
- b. CareerSource Centers provide excellent customer service to jobseekers and employers and focus on continuous improvement; and
- c. A One-Stop System that supports strong regional economies and plays an active role in community and workforce development.

The employer and job seeker services are designed and implemented in accordance with the guidance and direction of the CareerSource Board, its Business Competitiveness Council, and Career Council. The CareerSource Board's philosophy is that CareerSource has three basic customer groups; and, in order to provide excellence to one group, you must also provide excellent services simultaneously to the other groups." As the CareerSource Board continues to place emphasis on universal design in the delivery of services, it will also continue to emphasize the importance of providing "outstanding" customer service to the workforce system's primary customer groups:

- a. Businesses and organizations that employ individuals;
- b. Job seekers who are seeking their first job, a better job, and/or who wish to reenter the workforce; and,
- c. The general public who fund the CareerSource services through payment of taxes.

CareerSource staff understands that the One-Stop System is the gateway to employment opportunities and education for many job seekers, which includes individuals with disabilities. To ensure CareerSource produces an excellent product for the business community, CareerSource will provide its job seeking customers with evidence-based education and training tools that lead to success.

The CareerSource Board relies heavily on its Integrated Business Services Team, which consist of the CareerSource Business Services Team, Disability Program Navigator, Local Veterans Employment Representatives, and the CareerSource Rapid Response Team to work hand-in-hand promoting the Workforce Development System as a valuable asset in the community.

The CareerSource Board understands that “outstanding” customer service is important for the employer community, and equally as important for the job seeker customers. In order to provide outstanding service to One-Stop customers, CareerSource staff will provide effective and quality integrated job seeker and employer services to One-Stop customers. The goal of this service delivery is to achieve customer satisfaction for all customer groups. Therefore, it is essential that the CareerSource staff meet or exceed customer expectations; and, the employer’s hiring needs, while meeting the training and employment needs of job seekers, including those with disabilities.

The CareerSource integrated services are facilitated through the Employ Florida (EF) management information system. EF is the lynchpin in the management of the labor exchange and development of our workforce. The CareerSource staff will take the lead in promoting EF and its integrated case management services to job seekers and the employer community. CareerSource staff has been trained on how to administrator EF and will continue to receive EF enhancement training to ensure the highest level of customer satisfaction.

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

In order to better serve all customers in Okaloosa and Walton Counties, the CareerSource Okaloosa Walton Board procured a Mobile One-Stop Unit to use as a Mobile Business Center so that various services, including special events for employers can be taken directly to customers. The Mobile Business Center has the capability to access the and printing, copying, and fax capability; includes enough computers (13 stations) to be able to accommodate various classes, seminars and training sessions that can be delivered to employees, program participants, job seekers and the employer customers. The Mobile Business Center travels to remote locations within the region to bring services to customers that may not otherwise be able to access services.

Employers can use the Mobile Business Center for on-site recruitment efforts, job fairs, testing and training. Often times the employer customer has employees who are in need of additional soft skills and/or hard skills training in order to retain employment, be more productive, and be eligible for promotion and pay increases; but time away from work means loss of production.

Job Seeking customers can search for work, create and print resumes, access local and statewide job listings, and receive referrals to and information about the programs offered by CareerSource Okaloosa Walton.

The Mobile Business Center is also available for Disaster Assistance, if needed. CareerSource Okaloosa Walton staff are available to travel to remote locations to assist Florida's Emergency Management Team and the Federal Emergency Management Agency (FEMA), and disaster affected individuals and employers.

The Mobile Business Center is handicapped compliant and will provide a means for continued employment solutions to our local business community and its workforce, including individuals with disabilities.

The Career Centers in Okaloosa and Walton Counties and the Mobile Business Center are in compliance with the applicable requirements related to architectural accessibility, as set forth at 29 CFR 32.26 through 32.28.

In addition to the aforementioned virtual services that are available to CareerSource employers and jobseekers, the Employ Florida (EF) is available 24 hours a day, seven days a week. The EF website at www.employflorida.com provides access to employment opportunities, resume-building resources, etc.

The Florida Abilities Work portal is available at <https://abilitieswork.employflorida.com/vosnet/Default.aspx>. The micro-portal is housed on the EF website. The portal was specifically designed to provide resources to persons with disabilities and to assist employers who are interested in hiring.

CareerSource Okaloosa Walton has the capability to develop virtual workshops which universal customers will have easy access to at the CareerSource website: www.careersourceokaloosawalton.com. There will be a variety of workshops offered on a 24/7 basis when the project is completed.

Veterans Connecting Outreach

The CareerSource Okaloosa Walton Board's Veteran staff conducts transitional assistance for active duty military transitioning to the civilian community. The transitional assistance is conducted on a scheduled basis at Eglin Air Force Base and Hurlburt Field. The Board has established CareerSource Connecting Sites at Eglin Air Force Base and Hurlburt Field Family Support Centers, staff by the CareerSource Veteran team. CareerSource often will adjust services to meet the needs of the transitional military population.

Military Family Employment Advocacy Connecting Outreach

The Military Family Employment Advocacy (MFEA) Program was established due to the recognition of the challenges that military families face on a daily basis, including frequent relocations, recurring deployments, and lengthy periods of separation. These hardships heighten the anxiety experienced by military families and added to the uncertainties associated with deployments. Florida legislature recognizes these occurrences impact a military spouse's ability to gain job skills and maintain a career. Oftentimes, this hampers the military spouse from contributing to the financial well-being of the family and/or experiencing personal satisfaction with military life. This negatively affects the military's mission and it impacts retention.

The purpose of the MFEA program is to develop and provide outreach services to engage job seeking military dependents in the CareerSource One-Stop System services, and help educate the workforce community about the unique employment barriers faced by military family members. It also provides the MFEAs with an opportunity to highlight the unique talents military families, particularly military spouses, can bring to the workforce. CareerSource Okaloosa Walton operates remote CareerSource Connecting Sites at Eglin AFB, Hurlburt Field, and 7th Special Forces Group.

- (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 WIOA and programs carried out by one-stop career center partners (WIOA §108(b)(21)).**

The CareerSource Workforce Development System uses an Integrated Service Delivery Model for delivering services to CareerSource customers. All One-Stop programs and partner services are fully integrated with an entire menu of services offered through the One-Stop System. All functions are carried out with oversight from the CareerSource Okaloosa Walton Board, Business Competitiveness Council and Career Council.

Automated Tracking, Linking and Archiving Solution (ATLAS)

ATLAS Overview

CareerSource Okaloosa Walton utilizes an Electronic Data Management System (EDMS) known as ATLAS. ATLAS supports programs and manages all of the Career Center traffic and participant records.

ATLAS is web-based software developed for the Workforce Development Industry. ATLAS operates in a manner that's similar to having an extra staff member onboard. It performs nine different functions and contains seven unique system features.

ATLAS offers self-service technology for participants and customers. This allows customers to complete routine sign-in tasks with a high degree of independence while still maintaining a high level of service. The ATLAS system platform allows CareerSource staff to provide an increased level of service to all customers visiting the CareerSource Centers.

ATLAS is a centralized document storage system that stores, tracks and retrieves the traditional

“hardcopy” case file information on program participants. The information on each participant can also be securely shared allowing partners and auditors access to information. ATLAS also allows staff members access to customer case files and related information in real-time.

ATLAS Functions

- a. Electronic Document Management System
- b. Service Tracking
- c. Self-Service Document Submission (Kiosk, Scan, Fax, Email, Upload)
- d. Program and Registration Queue Workflow
- e. Electronic Courses
- f. Complete Audit Functionality
- g. Reporting and Statistics on Traffic and Workload
- h. Electronic Signature
- i. Virtual Job Fair

ATLAS System Features

- a. Storage - Secure centralized web-based document storage and retrieval system that accept activity and document data from many ATLAS modules, including: Self Sign, Staff-Scan, E-course, Self-Scan, Orientations etc. It stores detailed records of customer activity and document data and has the capacity to generate customized reports.
- b. Staff-Scan - Streamlines document filing and acts as CareerSource document management system. Staff-Scan allows staff members to review and file customer eligibility, activity compliance and other customer documentation via a web based interface (EDMS). Staff members will scan documents via copier/scanners and can even load customer related e-mail into the EDMS customer file.
- c. Customer Self-Sign In - The Self-Sign application allows staff members to track and assist customers in the most efficient way possible. Utilizing kiosk hardware and touch-screen technology, all customers choose from the menu selections/buttons and appropriate staff members are then notified of customers' arrival.
- d. Customer Alerts – Can alert specific staff members when specific activity events occur i.e. appointment arrivals or customer requests. Alerts can be configured to notify multiple staff members, supervisors or management staff members of specific customer logins, activity or document action.
- e. Customer Self-Scan Documents - Customers will scan documentation without staff member assistance using the Self-Service kiosks in the lobbies. That documentation is then immediately made available for review by staff members and the customers' cases will be updated in EF/OSST and then the document is stored in the customers EDMS files.
- f. E-Course - Allows for custom lessons to be created and administered from within ATLAS. These courses/modules can incorporate different types of lesson media (Video, Audio, PowerPoint, DOC, EXCEL, PDF, etc.) Once the curriculum is developed, CareerSource will be able to track lesson performance, issue completion certifications and E-file the results for customers and staff members.
- g. Customer Program Orientation - Provides the ability to conduct initial and ongoing orientation for long-term or temporary workforce programs i.e. TANF/WTP & WIOA etc. Once developed, the ATLAS Orientation module allows customers to progress through a self-guided, customizable orientation from their home, local CareerSource Center or anywhere there is a

computer with internet access.

Integration of Service Delivery through the One-Stop Delivery System for Business Customers

Business partnerships are essential in training Florida's workforce to meet the current and future needs of diverse business sectors, particularly in those industry clusters that hold the most promise for high-wage jobs and diversifying Florida's economy. The workforce system has made progress in partnering with business and industry and our current employer penetration/usage metrics indicates tremendous opportunity exists to develop a systematic, mutually beneficial approach to developing business partnerships. Both business and workforce have a vested interest in partnering and the onus is on the workforce system to effectively communicate and market the value of the partnership.

Certain career services must be made available to local businesses, specifically labor exchange activities and certain types of labor market information. CareerSource Okaloosa Walton will continue to establish and develop relationships and networks with large and small employers and their intermediaries.

The CareerSource Okaloosa Walton Board will offer customized business services to employers, employer associations, or other organizations. The full range of customizable services available through the Workforce Development System will be considered are tailored for specific employers. In situations where CareerSource is not a provider of the service, CareerSource staff will assist the employer in finding an appropriate service provider. The following is a list of services that may be customized to meet the needs of employers:

- a. Customized screening and referral of qualified participants in training services to employers;
- b. Customized services to employers, employer associations, or other employer organizations, on employment-related issues;
- c. Customized recruitment events and related services for employers including targeted job fairs;
- d. Human resource consultation services, including but not limited to assistance with:
 - (1) Writing/reviewing job descriptions and employee handbooks;
 - (2) Developing performance evaluation and personnel policies;
 - (3) Creating orientation sessions for new workers;
 - (4) Honing job interview techniques for efficiency and compliance;
 - (5) Analyzing employee turnover; or
 - (6) Explaining labor laws to help employers comply with wage/hour and safety/health regulations;
- e. Customized labor market information for specific employers, sectors, industries or clusters; and
- f. Other appropriate customized services.

The CareerSource Okaloosa Walton Board will also deliver other business services and strategies with partners that meet the workforce investment needs of the region's employers. All such services will be delivered with consideration given to partner programs' statutory requirements and consistent

with Federal cost principles. These business services may be provided through effective business intermediaries working in conjunction with CareerSource or through the use of economic development organizations, philanthropic, and other public and private resources in a manner determined appropriate by the CareerSource Board; and in some cases, in cooperation with the State. Allowable activities, consistent with each partner's authorized activities may include, but are not limited to:

- a. Developing and implementing industry sector strategies (including strategies involving industry partnerships, regional skills alliances, industry skill panels, and sectorial skills partnerships);
- b. Customized assistance or referral for assistance in the development of a registered apprenticeship program;
- c. Developing and delivering innovative workforce investment services and strategies for area employers, which may include career pathways, skills upgrading, skill standard development and certification for recognized post-secondary credential or other employer use, and other effective initiatives for meeting the workforce investment needs of area employers and workers;
- d. Assistance to area employers in managing reductions in force in coordination with rapid response activities and with strategies for the aversion of layoffs, which may include strategies such as early identification of firms at risk of layoffs, use of feasibility studies to assess the needs of and options for at-risk firms, and the delivery of employment and training activities to address risk factors;
- e. The marketing of business services to appropriate area employers, including small and mid-sized employers; and
- f. Assisting employers with accessing local, State, and Federal tax credits.

Integration of Service Delivery through the One-Stop Delivery System for Universal Customers

All One-Stop programs and services are fully integrated for the job seeking customers with an entire menu of services offered through the Career Centers. To highlight the value of the Workforce Development System, the CareerSource Board will offer a full array of career services to the CareerSource customers. The three basic types of career services are:

- a. Basic Career Services;
- b. Individualized Career Services; and
- c. Follow-up Services.

Basic Career Service

CareerSource Okaloosa Walton Board will ensure that Basic Career Services are made available and, at a minimum, will include the following services, as consistent with allowable program activities, partner programs, and Federal cost principles.

- a. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
- b. Outreach, intake (including worker profiling), and orientation to information and other services available through the One-Stop Delivery System;

- c. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
- d. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the One-Stop Delivery System;
- e. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the One-Stop Delivery System and, when appropriate, other workforce development programs;
- f. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed; and
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- g. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
- h. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's One-Stop Delivery System;
- i. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
- j. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.

- (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
- (2) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.

k. Individualized Career Services

CareerSource Okaloosa Walton Board must ensure that Individualized Career Services are made available if determined to be appropriate in order for an individual to obtain or retain employment. These services include the following services, as consistent with program requirements and Federal cost principles:

- (1) Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include:
 - (a) Diagnostic testing and use of other assessment tools; and
 - (b) In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals
- (2) Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information about, the eligible training providers (As described in § 680.180);
- (3) Group counseling;
- (4) Individual counseling;
- (5) Career planning;
- (6) Short-term pre-vocational services including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training;
- (7) Internships and work experiences that are linked to careers (as described in § 680.170);
- (8) Workforce preparation activities;
- (9) Financial literacy services (As described in sec. 129(b)(2)(D) of WIOA and § 681.500);
- (10) Out-of-area job search assistance and relocation assistance; and
- (11) English language acquisition and integrated education and training programs.

Follow-up Services

Follow-up Services must be provided, as appropriate, including: counseling regarding the workplace, for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment.

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

The CareerSource Okaloosa Walton Board operates under a direct service delivery model approved by the CareerSource Florida Board. The CareerSource Okaloosa Walton Board chose to provide Direct Services primarily for four reasons:

- a. To Streamline Service Delivery by eliminating management layers and focusing more resources on delivery of services;
- b. Cost Savings that eliminated duplicative costs for senior management, audit costs, financial processing services for participants, procurement costs, dual software licenses fee, insurance and other overhead costs;
- c. To be able to respond more quickly and effectively to dynamic changes in the labor market and funding fluctuations;
- d. The Direct Services Model selected by the Board is clear, well defined, and allows maximum decision making at the Center level while clearly delineating expectations for performance and accountability.

In the eight years of providing Direct Services, the CareerSource Board has been able to respond much more quickly to changing labor market conditions. The Board was able to respond quickly and effectively during the recession, increased ARRA funding, and the Deepwater Horizon oil spill. The CareerSource Board was also able to respond quickly to take advantage of other funding opportunities. The Direct Services Model also allowed the Board staff to implement new policies and new special projects in a minimum amount of time. The Board was also able to “gear up” and “gear down” staffing to accommodate the time-limited, one-time ARRA funding opportunities for businesses and unemployed workers.

The CareerSource Okaloosa Walton Board recently received approval for the modification to its Plan to renew its request for a waiver to allow the Board to continue to operate as One-Stop Operator and to provide direct core and intensive services. With the approval of the extension, the Board will continue to operate one full-service Career Center in Ft Walton Beach; a CareerSource Connecting Center in DeFuniak Springs; and, offer services to rural customers through its CareerSource Mobile Business Center.

The Organizational Structure of the management staff shows that the Executive Director is the sole person responsible and accountable to the Board of Directors for the delivery of services. The Executive Director reports to the CareerSource Okaloosa Walton Board who has delegated authority to the Board Chair and the Executive Committee to act on their behalf. The Chair and/or Executive Committee have the option of bringing any topic to the attention of the full Board of Directors.

The Operations Organizational Structure shows the Executive Director has delegated authority for day-to-day operations management to the Chief Operating Officer (COO). The COO has authority and responsibility for all programs and services provided through the CareerSource One-Stop System. A Center Coordinator is in place for each Center with the responsibility for the delivery of all services in the Career Center. Program Coordinators are responsible for the delivery of program services in the centers. The COO will provide direct supervision to the Center and Program Coordinators.

Staff training and professional development will be ongoing; any needed corrective actions will be taken to meet the identified inadequacies of the system and/or specific staff. New staff is required to complete a specific "New Hire Training Plan" with a required sign off by the Chief Operating Officer. Probationary periods will be effectively used to provide training, supervision, and evaluations to ensure only trained, qualified and competent staff will be retained. The COO with support from the Center and Program Coordinators assists with the initial training, refresher updates, monitoring for compliance and performance, and recommends any needed corrective actions.

Competitive Process for Awards to Service Providers

The CareerSource Board may elect to competitively procure components of services or special projects if the Board deems it to be in the best interests of effective and efficient delivery of services. The CareerSource Board process for awards for service providers will be as follows:

The CareerSource Board believes in and practices open and full competition in order to procure the best services possible at a reasonable price. The process includes advertisement in the local newspapers, website, workforce regions within Florida, and direct notification through the yellow pages if the vendor list for services is found to be limited. Written notification of Intent to Issue a Request for Proposal (RFP) or Invitation to Negotiate (ITN) is sent to each addressee on the Vendor list with instructions on how to request a copy of the solicitation. In an effort to continually improve the solicitation process and to ensure open and free competition, the CareerSource Board has a policy of conducting periodic surveys of vendors who request copies of the solicitation and then do not submit proposals or bids. This is done to determine if the process discouraged competition or if other factors were the primary reasons for the decision not to submit a proposal or bid. Information gained from the surveys is factored into improvement of the solicitation process.

The final selection of Service Providers is made by the CareerSource Board following a recommendation from an appointed Ad-Hoc Selection Committee named by the Chairman of the CareerSource Board. The staff of the CareerSource Board is charged with the responsibility of certifying the integrity of the solicitation process was met by ensuring that all requirements of the RFP are met in each proposal, that the proposal was received by the published deadline, and that the proposal was responsive to the RFP. After the proposals have been received and deemed responsive by the Board staff, the proposals are provided to the named members of the Ad-Hoc Selection Task Force for review, evaluation, and rating. The Ad-Hoc Task Force then meets in an open and advertised public meeting to complete the evaluation and rating process. The Ad-Hoc Task Force will report its results and make a recommendation to the full CareerSource Board for selection of the Service Provider/s. The Competitive Solicitation process includes a provision for any proposing agency to protest the decision of the Ad-Hoc Task Force or the CareerSource Board. The final decision is made by the CareerSource Board.

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

Continuous improvement, professional development for individual staff, and system-wide training are under the purview of the Career Council. The Career Council also oversees youth services and provides leadership and coordination to prevent overlapping of services; and identify gaps in services for youth and adults who are in need of career services. The Career Council also coordinates and collaborates with the Business Competitiveness Council in the design and delivery of employed worker services to the local business community.

Staff Training and Development

The CareerSource Board recognizes staff training as a critical component to System Improvement; and to ensuring high quality service delivery to CareerSource customers. To ensure the professional development of all CareerSource staff:

- a. The Chief Operating Officer and Quality Assurance Manager will ensure staff are trained on all new systems, policies and procedures, and other guidance.
- b. The Center coordinators and Program Coordinators, as appropriate, are responsible for the initial training of all newly hired staff, as well as on-going staff training. They are encouraged to request technical assistance, when needed.

A key piece of the CareerSource center standards is the credentialing of CSOW staff. All frontline staff, *including temporary staff* expected to be with the organization for more than six months will complete Florida's Workforce Professional training requirements (Tier 1 certification). Tier 1 certification must be completed within 6 months of the individual's hire date. All volunteers must, at a minimum, complete all appropriate no-charge DEO and Dynamic Works on-line training as defined by CareerSource Okaloosa Walton within 90 days of assignment.

CareerSource frontline staff are required to complete 15 hours of continuing education (CE) each year, with the first annual time period beginning one year after the employee's date of hire. Currently, CareerSource tracks CEs by Program Year. Each staff member is expected to complete their 15 hours of continuing education during each Program Year.

If a staff member does not successfully complete initial training, including Tier 1 certification, by the established dates, the applicable staff member will NOT be permitted to work at any of the CareerSource centers until all requirements are met. *This requirement may be modified by the Executive Director to align with CareerSource Florida, Inc. and/or DEO's One-Stop Certification Policy when finalized.*

The objectives of the continuing education requirement are to:

- a. Obtain information on current trends;
- b. Acquire knowledge in specific content areas;

- c. Master new skills and techniques;
- d. Expand and upgrade current knowledge and skills;
- e. Develop critical inquiry skills; and
- f. Achieve more balanced professional judgment.

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 Carl D. Perkins Career and Technical Education Act of 2006 (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 CareerSource Okaloosa Walton Board and Councils oversee the local CareerSource One-Stop System. The system provides an integrated delivery of employment and training services for the local business community and job seeking customers.

There is one full-service One-Stop Career Centers currently operating in LWDA 2 Fort Walton Beach (Okaloosa County). In addition to the one comprehensive Centers, there is a CareerSource One-Stop satellite site located in DeFuniak Springs in Walton County. The CareerSource Board also support Community Outreach Centers (COC) located at local community-based/faith-based organizations, and military installations at Eglin AFB, Hurlburt Field, and 7th Special Forces Group (SFG).

The CareerSource Okaloosa Walton serves as the One-Stop Operator providing and operating several workforce programs such as the Workforce Innovation Opportunity Act (WIOA), Welfare Transition Program, Wagner- Peyser (WP) Labor Exchange Programs, Supplemental Nutrition Assistance Program (SNAP) and other employment and training programs. As administrative entity and grants recipient, CareerSource Okaloosa Walton has responsibility for oversight and accountability for the CareerSource centers in Okaloosa and Walton Counties.

Reemployment Services System

All CareerSource programs are fully integrated with an entire menu of services offered in the Career Centers. These programs include Wagner-Peyser services, Workforce Innovation Opportunity Act services, the Trade Adjustment Assistance (TAA) Program services, Supplemental Nutrition Assistance Program services, Temporary Assistance for Needy Families (TANF)/Welfare Transition Program services, Reemployment Services and Eligibility Assessment (RESEA) Program services, Emergency Unemployment Compensation/Reemployment services, Veterans services, Military Family Employment Advocate (MFEA) services, Vocational Rehabilitation (VR) services, child care services, and the Senior Employment Program (SEP) services are all co-located in at least one of the Career Centers.

The provisions of the LWDA 2 Reemployment Services ensure a seamless integration of service offerings available to claimants and other Career Center customers. This approach seeks to maximize resources and enhance the job seekers' ability to return to the labor force at the earliest opportunity.

The Business Competitiveness Council and the Career Council provides the vision, guidance, direction, and evaluation of performance of the CareerSource One-Stop System, as well as design and delivery of employed worker services to the local business community. Chaired by private sector Board members, the councils provide continual feedback and recommends policy changes or new policy development to the full CareerSource Board. The councils also monitors the system for overlapping and gaps in services for targeted groups and universal customers who are in need of services.

The Business Competitiveness Council provides leadership through communication, coordination, and collaboration with local businesses, chambers of commerce, economic development organizations, and education providers, including school districts in Okaloosa and Walton Counties.

The Business Competitiveness Council oversees the development of the region's Targeted Occupations List (TOL) and makes recommendations to the full Board on which occupations are included on the Regional Targeted Occupations List (RTOL).

The Business Competitiveness Council will also oversee the development of the region's Eligible Training Providers List (ETPL) and makes recommendation to the full Boards on which training providers should be approved as Eligible Training Providers (ETP).

Having a single council oversee both the RTOL and ETPL will ensure the inclusion of programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006 (20 U.S.C. 2301 et seq.). This structure also supports the strategy identified in the State Plan under WIOA section 102(b)(1)(E) and WIOA §108(b)(2) .

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

Direct Services Model

The CareerSource Okaloosa Walton Board has chosen to operate a Direct Services Model that streamlines the delivery of services through the elimination of duplicate management layers. The Direct Services Model is clear, well defined, and allows maximum decision making at the Career Center level while clearly delineating expectations for performance and accountability. The Board will continue to operate under the waiver until such time as CareerSource Florida and the Department of Economic Opportunity provides additional guidance on what the structure should be in the future.

As provided in the Florida state legislation, the CareerSource Okaloosa Walton Board unanimously chose to request a waiver from the Governor to allow the Board to serve as the One-Stop Operator and to provide Core and Intensive services. In lieu of procuring Service Providers, the Board has elected to operate its one full service center located in Okaloosa County in Ft. Walton Beach; and, satellite center in Walton County in DeFuniak Springs. Additionally, the CareerSource Board will operate the CareerSource Mobile Business Center to deliver off-site services to the residents and businesses of Okaloosa and Walton Counties. The CareerSource Board will continue to make its

CareerSource Mobile Business Center available to Workforce Florida Inc., Board and the Department of Economic Opportunity in the event of a national or state emergency.

Competitive Process for Awards to Service Providers

The CareerSource Board may elect to competitively procure components of services or special projects if the Board deems it to be in the best interests of effective and efficient delivery of services. The CareerSource Board process for awards for service providers will be as follows:

The CareerSource Board believes in and practices open and full competition in order to procure the best services possible at a reasonable price. The process includes advertisement in the local newspapers, website, workforce regions within Florida, and direct notification through the yellow pages if the vendor list for services is found to be limited. Written notification of Intent to Issue a Request for Proposal (RFP) or Invitation to Negotiate (ITN) is sent to each addressee on the Vendor list with instructions on how to request a copy of the solicitation. In an effort to continually improve the solicitation process and to ensure open and free competition, the CareerSource Board has a policy of conducting periodic surveys of vendors who request copies of the solicitation and then do not submit proposals or bids. This is done to determine if the process discouraged competition or if other factors were the primary reasons for the decision not to submit a proposal or bid. Information gained from the surveys is factored into improvement of the solicitation process.

The final selection of Service Providers is made by the CareerSource Board following a recommendation from an appointed Ad-Hoc Selection Committee named by the Chairman of the CareerSource Board. The staff of the CareerSource Board is charged with the responsibility of certifying the integrity of the solicitation process was met by ensuring that all requirements of the RFP are met in each proposal, that the proposal was received by the published deadline, and that the proposal was responsive to the RFP. After the proposals have been received and deemed responsive by the Board staff, the proposals are provided to the named members of the Ad-Hoc Selection Task Force for review, evaluation, and rating. The Ad-Hoc Task Force then meets in an open and advertised public meeting to complete the evaluation and rating process. The Ad-Hoc Task Force will report its results and make a recommendation to the full CareerSource Board for selection of the Service Provider/s. The Competitive Solicitation process includes a provision for any proposing agency to protest the decision of the Ad-Hoc Task Force or the CareerSource Board. The final decision is made by the CareerSource Board.

- (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)).**

USDOL's vision for WIOA and the Workforce System presents an extraordinary opportunity to improve job and career options for our nation's workers and jobseekers through an integrated, job-driven public workforce system that links diverse talent to businesses. It supports the development of strong, vibrant regional economies where businesses thrive and people want to live and work.

To realize this vision, the CareerSource Board will revitalize the CareerSource One-Stop system to be characterized by three critical hallmarks of excellence:

- a. The needs of business and workers drive workforce solutions;
- b. CareerSource Centers provide excellent customer service to jobseekers and employers and focus on continuous improvement; and
- c. The CareerSource system supports strong regional economies and plays an active role in community and workforce development.

While all of the three elements are important to an effective and efficient workforce system, this response focuses on the second of the three hallmarks of excellence; and how CareerSource will expand access to employment, training, education and supportive services for eligible individuals, particularly eligible individuals with barriers to employment.

This effort will require a complete relook at the entire CareerSource workforce system. The CareerSource Board will facilitate this review which will include input from CareerSource partner agencies.

This review will require input from education and business on the development of career pathways and how to improve access to activities leading to recognized postsecondary credential, including industry-recognized credentials that are portable and stackable.

This review will require CareerSource to refocus its strategy on how services are delivered:

- a. First and foremost, the staff at the CareerSource centers will provide excellent customer service to jobseekers, workers and employers. Staff will focus on continuous process improvement, i.e., CareerSource staff and partners provide jobseekers, including individuals with barriers to employment, such as individuals with disabilities, with the skills and credentials necessary to secure and advance in employment with family-sustaining wages.
- b. Secondly, CareerSource staff, using improved processes, will enable employers to easily identify and hire skilled workers and access other supports, including education and training for their current workforce.
- c. Thirdly, the CareerSource Board will ensure rigorous evaluations and support continuous process improvement of CareerSource staff and centers by identifying which strategies work better for different populations and ensuring training providers remain accountable for performance; ensuring high-quality integrated data informs policy makers, employers and jobseekers' decision making; and, ensuring training providers are accountable for performance using the data and evidence.
- d. Finally, the review will ensure the CareerSource network and partner programs are organized to provide high quality services to individuals and employers. CareerSource Board and partners will increase coordination of programs and resources to support a comprehensive system that seamlessly provides integrated services that are accessible to all jobseekers, workers, and businesses.

(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)).

The One-Stop Center network and partner programs are organized to provide high-quality services to employers. The CareerSource Board, through the Business Competitiveness Council, CareerSource Business Services Team, and partners will increase coordination of programs and resources to support a comprehensive system that seamlessly provides integrated services that are accessible to all jobseekers, workers, and businesses.

The Workforce Innovation Opportunity Act’s (WIOA) support for sector strategies encourages the growth of sector partnerships as a proven industry-driven strategy for advancing workers and addressing employer skill needs. WIOA’s emphasis on job-driven investments that directly connect training to employment should provide more people with jobs and employers with a skilled workforce force.

The CareerSource Okaloosa Walton Board will continue to use a variety of service strategies to better align its resources to support and meet the training and employment needs of key industry sectors in the LWDA 2. The CareerSource Board has continued to emphasize the continued improvement of employer services as one of the top priorities for the 2017-2020 Program Planning Years. The Business Competitiveness Council will recommend to the CareerSource Board any new policies regarding employer and business services including opportunities for employed worker or incumbent worker training.

As part of the WIOA Sector Strategy, the CareerSource Okaloosa Walton Board will target the following eight key industry sectors:

NAICS	Industry Sector	Number Employed	Average Annual Wage	Historical Annual Growth Past Five Years	Projected Annual Growth Next 10 Years	Total Job orders	Total Job Openings	Total Job Referrals	Surveys
62	Health Care and Social Assistance	11,987	\$45,864	2.4%	2.2%	1,534	1,708	4,901	1
54	Professional, Scientific and Technical Services	8,772	\$76,452	3.8%	1.7%	1,671	1,717	2,818	6
72	Accommodation and Food Services	20,376	\$22,757	3.6%	1.3%	384	1,134	1,939	3
23	Construction	7,887	\$42,297	3.0%	1.7%	441	710	1,296	7
92	Public Administration	12,128	\$65,040	1.5%	0.7%	575	1,610	2,856	5
31	Manufacturing	3,541	\$61,858	-1.2%	0.0%	659	663	1,403	8
44	Retail Trade	17,988	\$27,941	2.6%	0.8%	315	367	1,397	4
48	Transportation and Warehousing	1,919	\$45,155	2.0%	0.8%	158	165	908	2

By focusing on critical industries, the Business Services (BS) Team will be able to operate more effectively aligning resources to address sector-specific talent needs of companies in the community. With increased knowledge in key sectors, BS team members will be able to create successful workforce solution plans to build talent pipelines addressing the needs of businesses.

CareerSource Okaloosa Walton will develop and implement a Sector Strategy Operational Plan for Business Services that includes specific objectives and action plans aimed to fulfill the LWDB 2 vision and mission. The LWDB 2 Sector Strategy model includes an Account Management approach where all members of the BS Team will carry a caseload of employers in the industries of choice. This will allow the Account Managers (AM) to become experts on the particular talent needs of assigned sectors leading to a more effective and organized way to operate.

One of the objectives of the sector strategy will be to increase the number of resume searches for companies with jobs in target industries. With the industry knowledge, Account Managers (AM) will be more successful at identifying and matching participants with the skills sets necessary for jobs in specific sectors. This action will increase our ability to fill job openings and place job seekers with employers.

Another objective of the LWDB 2 Sector Strategy is to conduct industry-focused Hiring Events. During this type of functions, we will not only extend an invite to employers in target sectors but educational partners with programs available to address the talent needs of those sectors. This will allow for career opportunities and the ability to create talent pipelines to tap on skills gap for companies in the region.

The CareerSource Board will initiate industry consortiums and increase participation in industry-focused committees. The purpose of this initiative is to identify current and future critical talent needs of local employers and agree on mechanism to address those needs. The CareerSource Board maintains membership and involvement in organizations such as chambers of commerce, Economic Development Council (EDC) in Okaloosa County and Economic Development Alliance (EDA) in Walton County, Society for Human Resource Management (SHRM), and other employer organizations. The CareerSource Business Services Members will become ac provide a copy of the CareerSource Sector Strategy Operational Plan including all established performance goals to the Executive Director for review and input. The Plan will be reviewed for any necessary modifications and presented to the Business Competitiveness Council for review and/or approval.

Below are samples of CareerSource Sector Strategies:

- a. Create effective workforce solution plans to fulfill talent needs of companies in the local area.
- b. Be ready and available to assist in the recruitment of potential new and expanding businesses with the guidance, direction, and coordination with the CareerSource Board and its coordination with the economic development organizations
- c. Provide mass recruitment services for new and expanding businesses by offering on-site services, use of CareerSource Center facilities, assessment services, extended or designated hours or other customized services to meet the needs of the businesses.
- d. Provide quality services for employers with specific talent needs including candidate search, pre-employment assessments, provisions for on-site interviewing at one or more of the CareerSource Centers
- e. Plan and industry-specific hiring events at least twice a month. In addition, Business Services will participate in community job fairs and any career fairs on customer needs, such as a targeted audience of veterans, senior workers, youth graduating from high school, dislocated workers in response to a large business or industry downsizing, specific industry needs, mass hire for new and expanding businesses, or other initiatives identified by the Board.
- f. Continue to promote the “Florida Ready to Work” credentialing for appropriate and potential employees and other assessments.

(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:

The CareerSource Board will invest in partnership infrastructure where key industry partnerships are not yet developed by increasing awareness of the important role and contributions of workforce development with a greater emphasis on economic development activities that promote:

- Growth of new and existing businesses;
- Demand-driven needs of business through stronger ties with the workforce community;
- Higher-level membership with employer focused organizations such as, participation with Chambers of Commerce, Florida Great Northwest, the Okaloosa County Economic Development Council, Northwest Florida Manufacturing Council, Walton County Economic Development Association, and regional economic development initiatives, Technology Coast Manufacturing and Engineering Network (TeCMEN), Northwest Florida Forward Talent Council and the statewide energy consortium.

These types of investments will highlight the workforce community's commitment to ensuring the needs of new and existing businesses are a top priority for CareerSource. They will also show that efforts are being made to meet the need of employers, which will give the economic developers in the region a stronger hand when partnering to recruit targeted industries for expansion into the workforce region.

The CareerSource Board will establish the workforce as the recognized convener and facilitator for solving workforce issues that meet the needs of business, job seeker, employed worker, and the community, for stable economic growth; keeping in mind, that the voice of business is the driving force for designing all services for workforce development.

The CareerSource Board will invest where the opportunity abounds to ensure the competitiveness of local businesses, not only for employee recruitment, but also for employee retention through promotion of training for the employed workers and incumbent workers with local resources, and through state resources for incumbent workers when the need is too great for the regions to handle.

The formation of industry consortiums to pool resources and helping to identify common workforce and training issues and possible solutions are being explored through organizations such as, Technology Coast Manufacturing and Engineering Network, Northwest Florida Manufacturing Council and the statewide energy consortium. An expected outcome of the industry-specific focus groups is to build participant commitment and foster stronger relationships among the participants

The CareerSource Board will continue to strongly support TeCMEN, a part of the Economic Development Council of Okaloosa County. This group brings together manufacturing, engineering and technology businesses to collaborate on business opportunities and discuss common business issues. The CareerSource board will also continue to support the mission of Florida's energy workforce consortium, both on a statewide and a regional basis. The CareerSource Board has also established a closer working partnership with the Building Industry Association (BIA) to help address the stresses and strains of the construction industry while also addressing the new and emerging needs of training for "green jobs" and new requirements in the construction industry.

The CareerSource Board will continue to serve on the Northwest Florida Manufacturers Council (NWPMC). NWPMC exists to strengthen the economic competitiveness of the region's manufacturers by acting as a single voice to address common interests. The Council represents manufacturers and partners in the Northwest Florida region to include Escambia, Santa Rosa, Okaloosa, Walton, Bay, Holmes, Washington, Jackson, Calhoun, and Liberty counties.

The program of work will be developed through input from the members, but will at least initially serve to deepen the manufacturing talent pool by working with education and workforce development partners to create programs that develop skillsets (technical and employability) that are needed in the region's manufacturing industry.

The CareerSource Board through the Business Competitiveness Council (BCC) will serve to identify and develop plans to meet the employment, skills and training needs of businesses in local targeted, high-value industries. The BCC will work in partnership with the Career and Youth Council to insure that the needs of these industry-specific businesses are known throughout the local one-stop system and individuals with the interest and aptitude for successfully working for these businesses are targeted for referrals.

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

WIOA establishes the development and implementation of industry sector partnerships as a required activity at both the state and local levels. WIOA section 134(a)(2)(B) provides that states must use a portion of state set-aside funds to assist local areas by providing information on and support for the effective development, convening, and implementation of industry or sector partnerships. Section 134(c)(1)(A)(v) requires that Title I-B funds are allocated to local areas must be used to develop, convene, or implement industry or sector partnerships.

These statutory changes reflect the growing recognition of sector partnerships as a key element of successful workforce development systems. Therefore, the CareerSource Okaloosa Walton Board will work with CareerSource Florida and the Department of Economic Opportunity to obtain additional funds to assist with developing industry and sector partnerships.

The Business Competitiveness Council will assist the CareerSource Board in the development and expansion of strategies for meeting the needs of employers, workers, and jobseekers, particularly through industry or sector partnerships related to in-demand industry sectors and occupations.

The CareerSource Board prioritize target industry clusters using LMI projections of growing industries within the Region. The largest industries in LWDB 2 are service industry occupations. Current and projected employment opportunities also show opportunities in the aerospace and defense related industries; information technology; construction; hospitality, tourism and retail industries; medical services; and professional services. Although, manufacturing does not show growth in the 10-year projection, local job orders and job openings support its inclusion on the list. Customer service has been identified as a necessary skill in the majority of the business sectors but most notably in the hospitality, tourism and retail industries. CSOW's Targeted Industry Sectors are included in the chart below.

NAIC Sector	Target Industry Sector
23	Construction
31-33	Manufacturing
48 -49	Transportation and Warehousing
72	Accommodation and Food Services
44 -45	Retail Trade
54	Professional, Scientific and Technical Services
62	Health Care and Social Assistance
92	Public Administration

CareerSource Okaloosa Walton Sector Strategy – March 13, 2018; Source: BLS

Before deciding on which sectors to include, the Business Competitiveness Council reviewed labor market data from BLS, JobsEQ, DEO LMI, and Employ Florida. The specific data reviewed is contained in the chart below:

NAICS	Industry Sector	Number Employed	Average Annual Wage	Historical Annual Growth Past Five Years	Projected Annual Growth Next 10 Years	Total Job orders	Total Job Opening	Total Job Referral	Survey
62	Health Care and Social Assistance	11,987	\$45,864	2.4%	2.2%	1,534	1,708	4,901	1
61	Educational Services	6,366	\$40,411	0.5%	2.0%	334	337	1206	3
54	Professional, Scientific and Technical Services	8,772	\$76,452	3.8%	1.7%	1,671	1,717	2,818	6
23	Construction	7,887	\$42,297	3.0%	1.7%	441	710	1,296	7
56	Administrative and Support and Waste Management and Remediation Services	6,861	\$36,994	2.8%	1.6%	1,255	2,143	6,844	2
72	Accommodation and Food Services	20,376	\$22,757	3.6%	1.3%	384	1,134	1,939	3
44	Retail Trade	17,988	\$27,941	2.6%	0.8%	315	367	1,397	4
48	Transportation and Warehousing	1,919	\$45,155	2.0%	0.8%	158	165	908	2
92	Public Administration	12,128	\$65,040	1.5%	0.7%	575	1,610	2,856	5
81	Other Services (except Public Administration)	5590	\$32,222.00	1.10%	0.70%	668	677	1,886	10
51	Information	1,105	\$69,161	-1.1%	0.5%	172	185	517	3
31	Manufacturing	3,541	\$61,858	-1.2%	0.0%	659	663	1,403	8

Sources: BLS, JobsEQ, DEO LMI, and Employ Florida

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

Alignment with both counties and regional economic development initiatives – Florida’s Great Northwest and Northwest Florida Forward; and alignment with education institutions within the region.

Sector strategy increases our ability to build talent pipelines that meet the needs of companies in a geographical area with similar worker skills needs in partnership with EDC, Educational Partners, Public and Private businesses and other stakeholders.

C. Describe how the local area ensures that the sector strategies are driven by industry;

Alignment with the needs of area businesses and industry organizations through surveys, participation in industry events, job fairs, close working relationships; profit and nonprofit

businesses on board, Business Competiveness Council, etc. and data driven – positions advertised and hired.

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

Internally the Board, executive director and Business Competiveness Council oversight, monthly management meetings and *is incorporated into everything we say and do.*

Externally – existing or created committees will provide input as toward use of training funds.

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

Training funds are distributed accordingly to both business through EWT and individuals through ITA

Business services organized by account manager experts who understand the needs and challenges of key industries and create effective workforce solution plans to address the specific talent needs. are delivered through sector job fairs, recruitment events, etc.

Job placement services are delivered through sectors, creating industry specialized employment placement specialists

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

Measure through performance funding model, common measures, industry surveys, continued industry engagement is the key measure.

Improve by continually adapting to the changes in the market, maintaining focus on continually meeting the needs of businesses.

Sustain by staying relevant - maintain the link between economic development, workforce development and education.

(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)).

The CareerSource Board will ensure 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. The Board believes that the needs of businesses and workers will drive workforce solutions in several ways.

First, the needs of businesses will inform and guide the workforce system. As businesses shape and drive regional workforce investments to build a pipeline of skilled workers, they will have access to skilled and talented pool of workers. This engagement will be facilitated by CareerSource and include other leadership in the workforce system.

Active participation in the development and provision of education and training, work-based learning, career pathways, and industry sector partnerships, will ensure business has a voice at the table. Through these partnerships, job seekers and workers, including those individuals with barriers to employment, such as individuals with disabilities, as defined by WIOA, will have the information and guidance to make informed decisions about training and careers, as well as access to the education, training and support services they need to compete in current and future labor markets.

In addition to direct input from businesses, the best and most reliable source of information on the jobs of today and tomorrow is the demand side. In Florida, the demand-side solutions or Job-driven demand means programs that are developed to advance the workforce are derived from employer driven data. It is important to ensure that businesses, as ultimate customers of the workforce system, are integral participants in developing and implementing policies and programs of the system; and that the workforce system is designed with the needs of employers as well as employees, in mind.

The CareerSource Board staff will better utilize the workforce supply and demand reports to anticipate employer needs in targeted industries and to tailor training programs to meet those needs. This approach is based on the understanding that analyzing occupations and critical skill sets within targeted industry clusters can help identify which occupations provide the best opportunities for investment to build different types of skills, identify gaps and build career ladders in high growth areas. The supply and demand model that focuses on demand-driven solutions can help guide both new and incumbent workers into the workforce by providing them with the best possible data to inform their decision about which career path to choose.

The LWDA 2 Board will provide a platform for creating and receiving input of industry specific training programs by staying informed on local and state initiatives. The CareerSource Board has a great relationship with the five area Chambers of Commerce, two economic development organizations, SHRM, education, and other business organizations. The Board will continue to develop opportunities for these organizations to come together and jointly develop strategies that will continue to focus on forming strong ties with economic development, educations and business partners to establish programs goals and objectives that keep pace with a demand-driven economy and maximize the delivery of services to business. The Region Two CareerSource Board's Business Competitiveness Council has in the past hosted an Information Technology (IT) focus group and job fair. As the Board continues down the path to sector partnerships, it intends to host more focus groups in the coming year.

Florida's Great Northwest is a prime location or business relocation and expansion of existing businesses. Both the Okaloosa and Walton County economic development organizations are very active in promoting the area as part of Florida's Great Northwest (9-county area). The CareerSource Board is a fully participating partner with these three leading economic development organizations; consequently, the Board stands ready to seize new employment opportunities with new targeted businesses and business expansions.

The CareerSource Board will promote the special Incumbent Worker Training Program and the Quick Response Training Program provided through CareerSource Florida. Additionally, the CareerSource Board and its Training Service Providers offer targeted businesses training for its employed workers designed to increase the skill-level and award certification to the newly trained employees.

The CareerSource Board will focus on demand-driven jobs, which will ensure the voice of business is the driving force for designing all services for workforce development. This will also ensure the competitiveness of local businesses not only for employee recruitment but also employee retention. CareerSource will partner with industry to promote training for employed or incumbent workers using local and state resources.

Identifying and taking action to solve workforce needs have established the CareerSource Board as the recognized convener and facilitator for developing workforce solutions that meet the needs of businesses, job seekers, employed workers, and the community for stable economic growth.

(7) Employer Engagement: Describe strategies and services 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;

WIOA emphasizes the creation and use of industry or sector partnerships, which bring together stakeholders connected to local industries to develop short and long-term workforce strategies in those industries. The CareerSource Board will engage employers in order to ensure that workforce investment activities meet the needs of businesses. CareerSource partners will be included in planning local sector partnerships in order to engage employers and ensure that participants can access emerging job opportunities.

The CareerSource Board will facilitate engagement of employers, including small employers, and employers in in-demand industry sectors and occupations, in workforce development programs by increasing awareness of the workforce system in Okaloosa and Walton Counties. The employers need to know that CareerSource is here for them. They need to know that CareerSource exist to primarily meet their employment needs. Businesses need to know the important role and contributions of CareerSource, with a great emphasis on the investment in economic development; and the demand-driven needs of employers. To that end, CareerSource will continue to develop relationships with businesses through membership and participation with chambers of commerce, Florida Great Northwest, the two local economic development organizations, and regional economic development initiatives to ensure the needs of existing businesses are being met and to facilitate recruiting targeted industries for expansion into the workforce region.

The CareerSource Board will pursue workforce solutions that position the region for stable economic growth. Keeping in mind that the voice of business is the driving force for designing program services for workforce development, the CareerSource Board will work to ensure the competitiveness of local businesses not only for employee recruitment but also employee retention through promotion of training for the employed workers using local and state resources for incumbent workers.

The formation of industry consortiums to pool resources and helping to identify common workforce and training issues and possible solutions will be explored through focus groups and surveys. An expected outcome of the industry-specific focus groups is to build participant commitment and foster stronger relationships among the participants.

The CareerSource Board will continue to strongly support the Technology Coast Manufacturing and Engineering Network, a member of the Economic Development Council of Okaloosa County. This group brings together manufacturing, engineering and technology businesses to collaborate on business opportunities and discuss common business issues.

The CareerSource Board will also continue to support the mission of Florida's Energy Workforce Consortium; To enhance engagement among key stakeholders (contractors, contractor associations, trade unions, legislators, Governor's office, Florida Energy Workforce Commission, etc.) both on a statewide and a regional basis.

The CareerSource Board has also established a close working partnership with the Building Industry Association (BIA) to help address the stresses and strains of a declining construction industry while also addressing the new and emerging needs of training for "green jobs" and new requirements in the construction industry.

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

A responsibility of the CareerSource Board is to ensure services are in place to support the local workforce development system that meets the needs of businesses in the local area. To meet this goal, the Board operates an Integrated Services Model in the CareerSource centers.

The Integrated Services Model aligns programs and ensures integrated service delivery throughout the workforce system in Okaloosa and Walton Counties. The Integrated Services Model relies on support through communication, coordination, and collaboration across the core programs (Adult, Dislocated Worker and Youth, Wagner-Peyser, Adult

Education and Vocational Rehabilitation) to create a single unified and integrated strategy for delivering services.

The Integrated Services Model views all of the core programs as one workforce system, assessing strategic needs and aligning them with service strategies that ensure the workforce system meets employment and skill needs of all workers and employers. The Board will also collaborate with other Career Center partner programs, and other partners at the state and local levels to ensure the needs of CareerSource customers are met. The WIOA and the State uses a certification process and competition to help achieve this vision and ensure continuous improvement in the workforce one-stop system.

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

The CareerSource Board promotes accountability and transparency, and believes that data drives decisions and informs customer choice. The CareerSource Board and other partners and local leaders ensure investments in employment, education and training programs are evidence-based and data-driven, and programs are accountable to participants and tax payers. Promoting accountability, transparency, and customer choice ensures the Board is a trusted partner in the community.

The CareerSource Board through the Business Competitiveness Council uses its leverage and good standing in the community to developed strong partnerships with local and regional economic development organizations and local chambers of commerce. The Council ensures these organizations are aware of workforce development programs and services. Finding and retaining qualified employees is at the top of the list of the identified needs the Council promotes.

The CareerSource Board has engaged the services of the consortium of chambers of commerce, economic development organizations, and education, to better coordinate workforce development programs. This partnership and forum will continue to help disseminate timely information to businesses regarding opportunities for training. To that end, these partners are committed to assisting with focus groups, seminars, and the promotion and coordination of workforce programs.

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

WIOA was enacted in July 2014. It provides a new blueprint for the nation's public workforce system. Under WIOA, the Wagner-Peyser Unemployment Insurance (UI) program is a vital program within the workforce system and continues to be a mandatory partner in the CareerSource centers. UI claimants continue to be critical customers for the workforce system. As CareerSource begin to engage partner programs to carry out strategic planning under WIOA, particularly as the Board considers service delivery design for the CareerSource centers, the Board will consider how to most effectively leverage the Reemployment Services and Eligibility Assessment (RESEA) program.

Wagner-Peyser is the State's labor exchange program that brings together individuals who are seeking employment with employers who are seeking employees. CareerSource administers a labor exchange program that has the capacity to:

- a. Assist job seekers to find employment; to assist employers in filling jobs;
- b. Facilitate the match between job seekers and employers;
- c. 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 Wagner-Peyser Act; and

- d. Meet the work test requirement of the State Reemployment Assistance system.

CareerSource ensures self-services are available to all job seekers and employer customers. Services may be accessed from computer workstations at the CareerSource centers or 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 the CareerSource centers.

Wagner-Peyser is an *essential core partner* in the One-Stop System. Career Services such as the Workforce Innovation and Opportunity Act's (WIOA) *intensive services and training/retraining* through the ITA (Individual Training Account) systems will be offered around *core services* to those unable to secure employment through core services.

Wagner-Peyser services are an integral part of the foundation for the universal services provided at the CareerSource centers. Customer flow in the Career Centers has been designed to make maximum use of the resources available to universal customers. An initial assessment -- taking a snap shot of the customer needs, will immediately direct the customer for appropriate services provided by either WIOA or Wagner-Peyser, depending on the needs of the customer. The state Management Information System (MIS) system for tracking of individuals seeking service will be the initial information gathering tool to collect necessary information for serving the customer as well as documentation for services provided. The Employ Florida (EF) system is the primary system for data collection of all CareerSource funded programs.

All CareerSource partners will coordinate, collaborate, and integrate resources, ideas, and services to serve the customer in the most effective manner.

With all Wagner-Peyser services available at CareerSource including access to Reemployment Assistance (RA) claims filing, the customer is directed to the appropriate staff person or service. The local CareerSource centers have been very effective in assisting customers in filing RA claims filed by the internet. Because of the need to assist customers on the use of the computer for filing claims, and unusual situations due to being near the border with another state, and other unique situations, considerable staff time must still be devoted to providing services including reemployment services for the RA claimant. All CareerSource staff persons have received basic training on how to access the website for filing claims.

The mix of Wagner-Peyser and WIOA services will have Wagner-Peyser carrying a significant role in core services with WIOA resources supplementing, not duplicating, core services. Wagner-Peyser resources will also provide selected offerings in intensive services such as specialized assessment, testing, and certification of skills such as those needed for Civil Service applications, federal bonding program for ex-offenders, certification for any targeted assistance for tax credits, and other special services. Wagner-Peyser staff will also supplement WIOA staff in providing group activities for job seekers.

CareerSource Customer Flow

First-time customers will be provided an orientation to the Resource Room and other services available through the CareerSource Center. The orientation will be geared toward encouraging the use of all facilities in the Career Center that are needed in order to secure employment. Self-help will be encouraged at the level the customer is able to comfortably succeed. Individual assistance will be provided to those customers who need a more intensive level. Instruction and information will be available through computer programs, videos on pertinent employment and training topics, and one-on-one instruction when necessary. Customers will be referred to CareerSource partner agencies for services when need or preference is indicated.

In areas where Wagner-Peyser staff is severely limited, WIOA staff and other CareerSource partners will supplement Wagner-Peyser resources in providing full core services. Wagner-Peyser staff, WIOA staff, and other cross-trained CareerSource partners will jointly and collaboratively provide the following services in the CareerSource Centers:

Labor Exchange Services:

- a. Applicant registration, selection and referrals for job openings;
- b. Job Search and placement assistance to job seekers;
- c. Occupational and Labor Market Information (LMI);
- d. Reemployment Services and Eligibility Assessment (RESEA) services;
- e. Referral and tie-in to Emerald Coast Professionals (ECP);
- f. Access to Reemployment Assistance Claims filing.
- g. Facilitate TAA/TRA/NAFTA activities.
- h. Specialized veterans employment and training services.
- i. Solicit job orders from employers.
- j. Recruitment services and special technical services for employers, including on-site employer visits;
- k. File Search for matching job listings with applicants;
- l. Update Job Listings with employer follow-up;
- m. Provide tax credit information for job seekers and employers;
- n. Conduct mass recruitment;
- o. Participate in Rapid Response;
- p. Market Services to Employers;

- q. Recruit for Job Corps;
- r. Provide services to federal contractors;
- s. Provide services for Migrant and Seasonal Farm workers, if needed;
- t. Provide services for Farm Labor Contractors, if needed;
- u. Assist with Disaster Reemployment Assistance Claims Filing;
- v. Skills Testing;
- w. Core services for dislocated workers;
- x. Resource Room Facilities.

Employer and job seeker customer services will be designed and implemented in accordance with the guidance and direction of the CareerSource Board and its Business Competitiveness Council and Career Council. The philosophy and position of the CareerSource Board is: "CareerSource has three basic customer groups and in order to provide excellence to one group, CareerSource must also provide excellent services simultaneously to the other groups." The three groups are:

- a. Businesses and organizations that employ individuals;
- b. Job seekers who are seeking the first job, a better job, and/or who wish to reenter the workforce;
- c. The general public who fund CareerSource services through payment of taxes.

To achieve customer satisfaction for all customer groups, it is essential to meet or exceed the employers' expectations and hiring needs while meeting the training and employment needs of the job seeker. This provides a balanced approach to meeting the goals of the CareerSource Board and making sound expenditure of the public funding received from the general public.

Reemployment Services and Eligibility Assessment (RESEA) Program

Preparing To Serve Reemployment Assistance (RA) Claimants and Customers

These services are designed to significantly reduce the number of weeks an individual receives unemployment payments.

Each RESEA participant will receive a career assessment or initial assessment interview to determine the employability needs of the individual. The initial assessment will be customer focused with the goal of empowering the participant to take responsibility for improving his or her economic circumstances.

The initial assessment will start with an orientation that includes information on the full menu of CareerSource Okaloosa Walton services available to assist the participant with reemployment. The orientation will serve as the intake process where information can be gathered for the more in-depth one-on-one interview later on with the RESEA staff. The RESEA staff will bring their appointment calendars with them to the orientation to facilitate the scheduling of appointments. This approach may ease the fear of the reemployment services process and allow the participant time to reflect on what's coming next on the road to reemployment.

As a part of the orientation, information on available workshops should be provided to the claimants.

Below are the services the participants should receive on the first visit to the CareerSource Okaloosa Walton Centers:

- a. An orientation that includes information on the full menu of CareerSource Okaloosa Walton services;
- b. Career Success Workshops attendance as appropriate;
- c. Labor Market Information tailored for the participants in attendance; and,
- d. An appointment for a one-on-one interview to address the specific needs of claimants.

The RESEA Interview Requirements

The RESEA Program has established specific requirements for the RESEA assessment that CareerSource staff must use when administering RESEA services. The following are the minimum requirements for the RESEA Program:

- a. The RESEA participants must have a one-on-one interview with the RESEA staff and receive an assessment of their employability skills, strengths, weaknesses, and barriers. The interview must include:
 - (1) Providing labor market information;
 - (2) Assisting participants in developing an Employability Development Plan, which must include:
 - a) Strengths, weaknesses, barriers, and employment or training goals;
 - b) Specific details regarding the assigned work search activities;
 - c) Specific details to show who is responsible for each action;
 - d) A statement to show that the EDP Responsibility Statement was reviewed with the participant to clarify program responsibilities for work search activities;
 - e) Documentation of referrals to other appropriate services, as required; and,
 - f) Assigned work search activities such as resume writing, interviewing skills, etc.

- (3) Referring participants for other employment services, including training when appropriate.
- a) The RESEA participants must be provided labor market information unique to their area of work experience using the EF Occupational Profile as the primary LMI Tool. If the labor market information shows the participant's occupation is in decline, they may be referred for training;
 - b) The EDP must be signed by the participant and the RESEA staff. A copy of the EDP must be given to the participant. The original should be scanned and filed in the ATLAS System;
 - c) The RESEA Staff should provide several job referrals to the participant as well as information on other CareerSource services. Referrals should be to jobs for which they are qualified for or suitable;
 - d) After all services have been provided, the RESEA staff must result each participant's attendance in EF to either "Attended" or "No-Show". If one of these is not marked, the region will not receive credit for the assessment. It is the RESEA staff's responsibility to ensure all of the 4-pack of services are provided and "resulted" in EF.

Documenting RESEA Services

The following RESEA services are required for all RESEA participants and will be provided as part of the intensive one-on-one interview:

- a. Orientation: RESEA staff must provide an orientation about all of the CareerSource Okaloosa Walton services with particular emphasis on accessing available labor market and career information. This activity should be manually entered and resulted in EF by the facilitator following the end of the orientation. Staff will use Activity Code: 101, Staff Assisted Orientation for this activity.
- b. Initial Assessment: RESEA staff must conduct a one-on-one assessment interview with the RESEA participants to review their employability skills, strengths, weaknesses, and barriers. In addition to the assessment tools mentioned in the local operating procedures (LOP), other tools may also be used such as Florida Ready to Work Credentialing Program, CHOICES360, Provelt! Barriers to Employment Success Inventory (BESI), etc. When using these assessments, staff should not set additional standards for participants to attain in order to be shown as successful completers. The only standards that may be used are those included with the assessment tool. Staff will use Activity Code 102, Initial Assessment for this activity.
- c. Labor Market Information (LMI): RESEA staff must conduct a briefing on the Provision of Labor Market Information unique to the RESEA participant's experience, skills and desired occupation. Staff will use Activity Code 107, Provision of Labor Market Information for this activity.

- d. Employability Development Plan: RESEA staff must assist the participants with developing an Employability Development Plan (EDP) unique to their challenges, skills, and goals discovered during the initial assessment. The EDP should be thorough and complete as it provides a road map for the participant to follow. Staff will use Activity Code 205, Develop Service Strategies (IEP, ISS, and EDP) for this activity.

(8) Priority for Services: Describe local policies and procedures are established to prioritize 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.

WIOA Enhanced “Priority of Service”

WIOA includes enhanced “priority of service” requirements to ensure that recipients of public assistance and other hard-to-serve populations are able to access critical employment and training services through the one-stop system. CareerSource will review the Temporary Assistance for Needy Families (TANF) program to enhance priority of service policies to ensure that TANF recipients are prioritized under such policies and that they are offered services that meet their needs.

Under WIA, CareerSource was required to provide priority for intensive and training services to recipients of public assistance and other low-income individuals in instances where local funds were “limited.” WIOA strengthens this requirement by eliminating the conditional language relating to “limited” funding, and adding individuals who are basic skills deficient to the categories of WIOA participants who must receive priority of service. These statutory changes will help to address concerns that individuals with barriers to employment were often underserved through the one-stop system under WIOA, and ensure that resources are more equitably allocated to support those with the greatest needs.

WIOA section 134(c)(3)(E) states in part, that with respect to funds allocated to a local area for adult employment and training activities under paragraph (2)(A) or (3) of WIOA section 133(b), priority shall be given to recipients of public assistance, other low- income individuals, and individuals who are basic skills deficient for receipt of career services described in paragraph (2)(A)(xii) and training services. The CareerSource Board will instruct CareerSource staff to ensure these priority groups receive priority of services without consideration to limited funding.

CareerSource Okaloosa Walton supports WIOA new regulation implementing the new priority of service requirements, including designating those career services subject to the priority of service requirements as “individualized” services.

How to Apply Priority of Services for Veterans and Eligible Spouses

Eligibility for Priority of Services

For the purpose of implementing priority of services in LWDA 2, the CareerSource Board will use the broad definition of veteran found in 38 U.S.C. 101(2). Under this definition, the term “veteran” means a person who served at least one day in the active military, naval, or air service, and who

was discharged or released under conditions other than dishonorable, as specified in 38 U.S.C. 101(2).

“Active service” includes full-time Federal service in the National Guard or a Reserve component. This definition does not include full-time duty performed strictly for training purposes (i.e., often is referred to as “weekend” or “annual” training); nor does it include full-time active duty performed by National Guard personnel who are mobilized by State rather than Federal authorities (usually occur in response to events such as natural disasters).

The CareerSource Board has adopted the definition for “Eligible Spouse” as defined at section 2(a) of the JVA (38 U.S.C. 4215[a]) which means the spouse of any of the following:

- a. Any veteran who died of a service-connected disability;
- b. Any member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been listed for a total of more than 90 days:
 - (1) Missing in action;
 - (2) Captured in the line of duty by a hostile force; or
 - (3) Forcibly detained or interned in the line of duty by a foreign government or power;
- c. Any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or
- d. Any veteran who died while a disability was in existence. A spouse whose eligibility is derived from a living veteran or service member (i.e., categories b. or c. above) would lose his or her eligibility if the veteran or service member were to lose the status that is the basis for the eligibility (e.g. if a veteran with a total service-connected disability were to receive a revised disability rating at a lower level). Similarly, for a spouse whose eligibility is derived from a living veteran or service member, that eligibility would be lost upon divorce from the veteran or service member.

Implementing Priority of Services in the CareerSource Centers

The priority of services refers to those veterans and spouses who are eligible for priority of services as “covered persons” and refer to those not eligible for priority of services as “non-covered persons.”

Priority of services means that veterans and eligible spouses are given priority over non-covered persons (Within the population receiving the services) for the receipt of employment, training, and placement services provided under a qualified job training program.

Priority means that veterans and eligible spouses are entitled to precedence over non-covered persons (Within the population receiving the services) for services. This means that a veteran or an eligible spouse receives access to a service before a non-covered person; or, if the resource is

limited, the veteran or eligible spouse receives access to the service instead of or before the non-covered person.

For a service such as classroom training, priority of service applies to the selection procedure:

- a. First, if there is a waiting list to start a training class, priority of services is intended to require a veteran or eligible spouse to go to the top of that list.
- b. Second, priority of services applies up to the point at which an individual is both:
 - (1) Approved for funding; and,
 - (2) Accepted or enrolled in the training class.

Therefore, once a non-covered person has been both approved for funding and accepted/enrolled in a training class, priority of services is not intended to allow a veteran or eligible spouse who is identified subsequently to “bump” the non-covered person from that training class.

Administering Priority of Services

Qualified job training programs fall into two basic categories:

- a. Universal access programs; or
- b. Programs that require participants to meet specified eligibility criteria.

Universal Access Programs -- For workforce programs that deliver services to the public as a whole without targeting specific groups, veterans and eligible spouses must receive priority of services over all other program participants. For example, the primary universal access services are the “core” services delivered through the one-stop system under the Wagner-Peyser and WIOA programs. Veterans and eligible spouses receive the first level of priority in universal access programs.

Programs with Eligibility Criteria -- Eligibility criteria identify basic conditions that each and every participant in a specific program must meet. It is important to note that a veteran or eligible spouse must first meet any and all of the statutory eligibility criteria in order to be considered eligible for:

- a. Enrollment in a qualified program;
- b. Receipt of priority for enrollment in the program; and
- c. Priority for receiving services in the program.

(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)).

WIOA made some significant changes to how services are delivered to adults and dislocated workers in the one-stop delivery system. Under WIOA, adults and dislocated workers may access career services and training services. WIOA provides for a workforce system that is universally accessible,

customer centered, and training that is job-driven.

Training is supported through a vigorous Eligible Training Provider List (ETPL), comprised of providers with a proven capability of securing quality employment outcomes for participants. WIOA also provides enhanced access and flexibility for work-based training options, such as Registered Apprenticeship (RA), on-the-job training, customized training, and incumbent worker training.

Training services are critical to the employment success of adults and dislocated workers. *There is no sequence of service requirement for training services.* This means that CareerSource staff may determine training is appropriate regardless of whether the individual has received basic or individualized career services first. Under WIOA, training services may be provided if the CareerSource staff determine, after an interview, evaluation or assessment, and career planning, that the individual:

- a. Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- b. Is in need of training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment, through career services alone; and
- c. Have the skills and qualifications to successfully participate in the selected program of training services.

Training services, when determined appropriate, will be provided either through an Individual Training Account (ITA) or through a training contract. Training services must be linked to in-demand employment opportunities in Okaloosa and Walton Counties or the planning region, or in a geographic area in which the adult or dislocated worker is willing to commute or relocate.

There are exceptions to the use of an ITA for training. In these situations, a contract for services may be used to provide for the training services. The exceptions include:

- a. OJT, which could include placing participants in a registered apprenticeship, customized training, incumbent worker training, or transitional jobs;
- b. Where CareerSource Okaloosa Walton Board determines there are an insufficient number of eligible providers in the local area to accomplish the purpose of an ITA. If this process is initiated, CareerSource Okaloosa Walton will:
 - (1) Follow the guidance outlined in CareerSource Florida Administrative Policy Number #90, effective March 1, 2016, for Initial Eligibility and Continued Eligibility for eligible training providers;
 - (2) The following will be taken into consideration when making the decision whether to approve provider:
 - (a) The training to be provided;
 - (b) Prior performance of the Training Vendor;
 - (c) Eligibility to provide contracted services with the state of Florida;

- (d) Certification as a Training Provider by the Department of Education or CIE; and
 - (e) Agreement to provide performance data FETPIP or CIE or the CareerSource Okaloosa Walton.
- c. If the CareerSource Okaloosa Walton Board determines a community-Based Organization or other private organization provides effective training services to individuals with barriers to employment. If this process is initiated, CareerSource Okaloosa Walton will follow the procedures outlined in the paragraph above. In addition to the criteria above, the following will also be taken into consideration:
- (1) Completion rate;
 - (2) Employment rate in related occupation at 1 Year;
 - (3) Percentage of individuals who obtain unsubsidized employment;
 - (4) Wages at placement in employment;
 - (5) Retention rate in unsubsidized employment at six months after employment;
 - (6) Wages at six months after employment;
 - (7) Rate of licensure;
 - (8) Cost per participant.
- d. Training for multiple individuals in in-demand industry sectors or occupations, as long as the contract does not limit the individual's consumer choice.
- e. Circumstances in which a pay-for-performance contract is appropriate, consistent with 20 CFR 683.510.

This policy includes “individuals with barriers to employment” instead of the term “special participant,” as used under WIA. “Individuals with barriers to employment” is broader than “special participants” and includes: Displaced homemakers (20 CFR 680.630); low-income individuals; Indians, Alaska Natives, and Native Hawaiians; individuals with disabilities; older individuals; ex-offenders; homeless individuals; youth who are in or have aged out of the foster care system; individuals who are English learners, have low literacy levels, or face substantial cultural barriers; eligible MSFWs; individuals within 2 years of exhausting lifetime eligibility under TANF; single parents (including pregnant women); long-term unemployed individuals; and members of other groups identified by the Governor.

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

The WIOA consumer choice requirements are similar to those established under WIOA. The term

“Career Advisor,” used in WIOA, replaces the term “case manager,” used in WIOA. CareerSource staff or Career Advisors will coordinate funding for ITAs with other funding sources in order to assist individuals in obtaining training services. Priority consideration will be given to programs that are aligned with in-demand industry sectors or occupations on the Regional Targeted Occupational List.

WIOA training services will be provided in a manner that maximizes consumer choice in the selection of an eligible provider of such services and includes the following functions:

- a. **Eligible Providers.** The CareerSource Board, through the CareerSource centers, will make available the list of eligible providers of training services described in WIOA section 122(d), and accompanying information.;
- b. **Individual Training Accounts.** An individual who seeks training services and who is eligible pursuant to previous guidance, may, in consultation with a Career Advisor, select an eligible provider of training services from the list of providers on the ETPL. Upon such selection, the Career Advisor involved will, to the extent practicable, refer such individual to the eligible provider of training services, and arrange for payment for such services through an individual training account;
- c. **Coordination of Funds.** The CareerSource Board, through the Career Advisor, will coordinate funding for individual training accounts with funding from other Federal, State, local, or private job training programs or sources to assist the individual in obtaining training services;
- d. **Priority consideration** will be given to programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in Okaloosa and Walton Counties.

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

Individual Training Accounts (ITAs) are the primary method used by CareerSource Okaloosa Walton to procure training services under WIOA. In certain circumstances a contract for training services may be used instead of an ITA. The CareerSource Board may also determine that providing training through a combination of ITAs and contracts is the most effective approach. This approach could be used to support placing participants in programs such as Registered Apprenticeships and other similar types of training.

Individual Training Accounts are established on behalf of eligible participants. ITA services are made available to employed and unemployed adults and dislocated workers who have met the eligibility requirements for WIOA Individualized Services, and have been determined to be unable to obtain or retain employment leading to the local definition of self-sufficiency. The participant after an interview, evaluation or assessment, and career planning, has been determined to be in need of training and has the necessary skills and qualifications to successfully complete the selected training program. Selection of a training program must include the identification that the training is directly linked to occupations that are on the Regional Targeted Occupations List.

An ITA may be used for a training program that is up to two years in length. Limited additional time may be pre-approved by the Executive Director or Chief Operating Officer on an individual basis, and is dependent upon the participant's circumstances.

Funding for training is limited to individuals who:

- a. Are unable to obtain grant assistance from other sources to pay the costs of their training; or
- b. Require assistance beyond that available under grant assistance from other sources to pay the costs of such training. ITA funding can only be utilized after Pell Grant, TAA, and any other scholarship/aid for training.

Payments for training may be made through electronic transfers of funds, vouchers, or other appropriate methods. Payments may be made at the beginning of the training program or on an incremental basis.

Workforce Planning Areas

Because of the commonalities of the labor market of surrounding workforce regions and the geographical proximity of the labor market as well as for Training Vendors in neighboring Workforce Planning Regions, the CareerSource staff are empowered to use discretion in issuing ITA's. Staff are authorized to issue an ITA for training for an occupation that does not appear on the Regional List but does appear on one of the planning regions list; or on the statewide list, providing the individual is willing to move if necessary to find employment or to commit to an out of the region commute. Impacting this decision is the willingness of the trainee to relocate, if necessary, in order to find employment in a training-related field. However, commuting between Regions in the Workforce Planning Area is a natural work commute for individuals seeking employment in northwest Florida.

A. Describe any ITA limitations established by the board;

ITA's are utilized to procure training services for WIOA adult and dislocated workers. The amount of an ITA per person may vary based on other financial assistance. The CareerSource ITAs are capped at \$6,000.00 maximum per person. The cap amount includes the costs for covered tuition, required books, and fees of training providers and other training services prescribed and authorized by the Workforce Innovation and Opportunity Act of 2014. The Executive Director (ED) and Chief Operating Officer (COO) may approve specialized courses or programs on a case-by-case basis for those that exceed the established limit, assuming the reason is at no fault of the participant. Request for exceptions must be made prior to enrollment.

B. Describe any exceptions to the use of ITAs.

In general, providers of on-the-job training, customized training, incumbent worker training, internships, and paid or unpaid work experience opportunities, or transitional employment shall not be subject to the ITA requirements.

Under section 134(c)(3)(G)(ii) of WIOA, the contract exceptions to an ITA have been expanded to include the full list of exceptions as provided below:

- a. On-the-job training, which may include placing participants in a Registered Apprenticeship program, customized training, incumbent worker training, or transitional jobs;
- b. If the CareerSource Board determines that there are an insufficient number of eligible providers of training services to use ITAs;
- c. If there is a training services program of demonstrated effectiveness offered in the Region by a community-based organization or other private organization;
- d. If the CareerSource Board determines that the most appropriate training could be provided by an institution of higher education to train multiple individuals for jobs in in-demand sectors or occupations; and
- e. If the CareerSource Board determines, a pay-for-performance contract is the most effective means of providing training services (note that no more than 10 percent of the local funds may be spent on pay-for-performance contract strategies as they are defined in section 3(47) of WIOA).

(12) Microenterprise and Entrepreneurial Training: Describe mechanisms currently in place or in consideration that provide microenterprise and entrepreneurial training. Describe mechanisms 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)).

CareerSource Okaloosa Walton recognizes the importance of coordinating workforce and economic development activities in order to focus on long-term economic growth.

Part of the CareerSource plan for long-term economic growth is a strong referral mechanism through the one-stop system; and coordination strategies established to enhance entrepreneurial training and microenterprise services.

Funds allocated to a local area for adults under paragraph (2)(A) or (3), as appropriate, of WIOA section 133(b), and funds allocated to the local area for dislocated workers under WIOA section 133(b)(2)(B), may be used to provide, through the one-stop delivery system, innovative programs and strategies designed to support and meet the needs of employers.

The CareerSource Board supports implementing innovative programs and strategies designed to support and meet the needs of employers (Including small employers). The CareerSource Board will work with the economic development organizations in Okaloosa and Walton Counties to identify training and support programs that may benefit microenterprises (Generally, less than six employees) and entrepreneurial' s in Okaloosa and Walton Counties. Programs and strategies may include incumbent worker training, customized training, and other appropriate training.

(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 DEO and other partners, including educational partners. Describe how job seekers are made aware of apprenticeship opportunities (TEGL 3-15).

CareerSource Okaloosa Walton is committed to promoting Registered Apprenticeship (RA) opportunities as a career pathway for job seekers; and as a job-driven strategy for employers and industries. Resources will be made available to support eligible participants of apprenticeship programs in the form of ITAs; OJT contracts for new hires; supportive services to include training materials such as books and tools; and employed worker training funds for companies that carry out programs under the National Apprenticeship Act.

There is one local apprenticeship program in Okaloosa and Walton Counties; however, CareerSource will work with the Florida Department of Education Division of Career and Adult Education and regional apprentice training representatives to assist in the expansion of existing, or development of new apprenticeship programs in the local area based on employer demand in LWDA 2.

The coordination with eligible training providers, employers, joint apprenticeship training programs; and local educational institutions at the secondary and post-secondary levels will also be encouraged to provide support to these programs to meet industry demand and align with local workforce initiatives. Additionally, apprenticeship programs will be promoted to employers as a solution to the challenges of finding workers with the skills required to fill essential positions.

Apprenticeship programs will be promoted to job seekers in the CareerSource centers; and through partner organizations co-located in the centers; as a career pathway. Promotion of apprenticeships will include resource room staff; and, other career development planning with center staff and Career Advisors. Promotion items may include the organization's website, flyers, and brochures.

An additional resource is target recruitment efforts for regional openings in specific programs. CareerSource Okaloosa Walton will also assist regional apprenticeship programs with the placement of apprentices not currently engaged with a participating employer by providing referrals of job seekers seeking an apprentice to employers.

CareerSource Okaloosa Walton sees Registered Apprenticeship as an important component of potential training and employment services that the workforce system can provide to its customers. CareerSource staff, specifically, Career Advisors will be encouraged to use RA; and it should be used more often as a career pathway for job seekers; and as a job-driven strategy for employers and industries. RA can be funded through several mechanisms. Section 122(a)(3) of WIOA provides a new opportunity for RA programs to be more directly connected to the public workforce system.

As Registered Apprenticeship programs, they automatically qualify to be placed on the Statewide and Regional Eligible Training Provider List (RETPL), allowing ITAs to support participants in RA programs, and more directly connect those programs to one-stop centers.

(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, 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).

Incumbent Worker Training

Incumbent worker training provides both workers and employers with the opportunity to build and maintain a quality workforce. CareerSource may use incumbent worker training to help avert potential layoffs of employees, or to increase the skill levels of employees so they can be promoted within the company and create backfill opportunities for employers. Under section 134(d)(4) of WIOA, CareerSource can use up to 20 percent of its adult and dislocated worker funds to provide for the federal share of the cost of providing incumbent worker training. Incumbent worker training needs to take into account the following factors:

- a. The characteristics of the participants in the program;
- b. The relationship of the training to the competitiveness of a participant and the employer; and
- c. Other factors the State or CareerSource may determine appropriate (e.g., the number of employees participating in the training, wage and benefit levels of those employees (both pre- and post-participation earnings)), and the existence of other training and advancement opportunities provided by the employer).

Employers are required to pay for a significant cost of the training for those participants in incumbent worker training; this can be done through both cash and/or in-kind payments. The wages paid to participants, while in training, may be considered as a source of matching funds (Rules for matching funds are provided in the Uniform Guidance and DOL exceptions at 2 CFR 200.306 and 2 CFR 2900.8). Under section 134(d)(4)(D) of WIOA, the minimum amount of employer share in the incumbent worker training depends on the size of the employer:

- a. At least 10 percent of the cost, for employers with 50 or fewer employees;
- b. At least 25 percent of the cost, for employers with 51 to 100 employees; and
- c. At least 50 percent of the cost, for employers with more than 100 employees.

ETA encourages States and local areas that utilize incumbent worker training to ensure contracts with employers provide sufficient information to include participants in reporting. Incumbent workers should be coordinated with the DEO to ensure the appropriate reporting codes are considered.

Employed Worker Training Program

The employed worker is an employed individual who is served at the local level. These individuals may be served with local level formula adult funds if they do not qualify as a dislocated worker. The funding for this activity comes from the WIOA local adult allocation.

The focus on serving the employed worker is the employer. WIOA eligibility requirements must be met for participants. These individuals may be served by documenting that they are in need of services in order to obtain or retain employment that allows for self-sufficiency. Employed workers who currently meet the local definition of self-sufficiency but need services in order to retain their

self-sufficient employment may be served if documentation is obtained from the employer stating that the employee(s) will not be retained unless additional training or services are received.

The LWDA 02 Employed Worker training is designed to upgrade skills, provide training involving new equipment, systems, or procedures, and for improving the productivity, increasing quality, and remaining or gaining competitiveness. The CareerSource Board welcomes applications from local businesses to provide training for its currently employed workforce.

Employed Worker Training allows the Board to provide training to Employed Workers of local businesses who are currently (at the time of application) earning \$16.71 or below per hour (income of the individual only; no determination is made of household income.)

In order for the employees of a local business to receive funded training, a determination of eligibility must be completed. As part of the enrollment process, each trainee must complete a WIOA Application. The individual provides most of the information; however, the business may verify or attest to whether the individual is earning \$16.71 or below per hour.

The current Self-Sufficiency rates for employed workers, adults and dislocated workers, and TANF participants for LWDB 2 are as follows:

- a. Adults and Dislocated Workers \$16.71
- b. TANF Participants \$15.50

The Florida's Great Northwest is designed to create high-wage, high-skill jobs within the 9 counties in Northwest Florida. To realize its goal of job creation, the great majority of its grant funding is tied directly to job creation efforts. The industries targeted for the initiative are the industries the Region will target for skills upgrade. The Florida's Great Northwest has chosen the following industries as high growth and high demand for the region. The industries targeted for the initiative are the industries the Region will primarily target for skills upgrade: Aviation, Aerospace, Defense and National Security; Life Sciences (Human Performance Enhancement, Medical Device Manufacturing, Medical Technologies, Health Services, and Biotechnology); Information Technology; Engineering; Renewable Energy and Environment; Transportation, Logistics and Distribution; and Construction Products Manufacturing.

Layoff-Aversion Incumbent Worker Training Program (LAIWT)

The CareerSource considers a layoff aversion exists when:

- a. A worker's job is saved with an existing employer that is at risk of downsizing or closing; or
- b. A worker at risk of dislocation transitions to a different job with the same employer or a new job with a different employer and experiences no or a minimal spell of unemployment.

CareerSource will contact the business after learning of the planned lay-offs. Based on the immediate needs and time table, the Rapid Response Team will design the level of response needed for the business. The Rapid Response Team includes key staff such as the COO, Business Services, Wagner-Peyser, and other designated staff. CareerSource will determine the number of affected workers involved and work with the employer to develop a strategy to avert any layoffs.

The CareerSource team will work with business to determine the circumstances surrounding the probable layoffs and how training will prevent or reduce the magnitude of the layoff. The CareerSource will also determine the likelihood of future layoffs and training needs.

CareerSource Board has a great relationship with the five area Chambers of Commerce, two Economic Development Councils, SHRM, and other business organizations and regularly brief their members to keep them up to date on workforce programs.

Based on funding availability, the CareerSource Board will work with the employer on lay-off aversion strategies. Business Services representatives will also work with the employer to assist completion of an application for IWT funds as administered by Workforce Florida.

Quick Response Training

The CareerSource mix of One-Stop services include providing labor market information to employers to assist those businesses with monitoring growth, retention/training needs, expansion, and to help prevent business closure. The Governor is committed to increasing training opportunities to individuals through alternate delivery vehicles such as OJT and customized training. CareerSource Boards are encouraged to develop local partnerships with community businesses and industry thus encouraging economic development in their areas.

Additionally, Florida's Quick Response Training (QRT) and Incumbent Worker Training (IWT) programs (identified as Florida Flex), two of the flagship tools at CareerSource Florida, are market relevant providing just-in-time training driven by industries' needs and industries' choices in training providers. QRT and IWT serve as powerful tools for workforce investment by leveraging public workforce system funds with private sector resources. The QRT and IWT programs have an outstanding track record of return on investment as it relates to wage income. Region 02 employers have taken advantage of these opportunities in the past and will continue to do so. These short-term, cost-effective training projects are aimed at generating the skills and competencies necessary to support industry now and in the future. A close partnership between CareerSource Business Services and the existing Business Services of the Economic Development Councils combine efforts at identifying businesses that may benefit from QRT and/or IWT.

The Business Services Team informs businesses through outreach at service clubs, community events, chamber functions and one-on-one visits, and other methods of the availability of these, value added, business-focused, training programs, such as Incumbent Worker Training, Quick Response Training, Employed Worker Training and On-the-Job Training. The Business Services Team, the CareerSource Center staff, and the CareerSource Board's Business Services staff also assist businesses in applying for and completing applications. The CareerSource Board is increasing its marketing of these programs to ensure more businesses are aware of these value added services. Particular emphasis will be placed on small and minority owned businesses and on enterprise zones within our community.

On-the-Job Training

CareerSource Okaloosa Walton will continue to use OJT as a key method of delivering training services to adults and dislocated workers. WIOA provides for CareerSource to provide up to 50 percent of the wage rate of the participant to employers for the costs of training while the participant is in the program. Additionally, CareerSource has the flexibility under WIOA to increase the reimbursement level to up to 75 percent taking into account the following factors:

- a. The characteristics of the participants (e.g. length of unemployment, current skill level, and barriers to employment);
- b. The size of the employer (e.g. small and medium-sized business often have more barriers to participation at lower reimbursement rates);
- c. The quality of employer-provided training and advancement opportunities; and
- d. Other factors the State or local boards may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees (both pre and post participation earnings)), and relation of the training to the competitiveness of the participant).

Customized Training

Customized training is defined as training that is designed to meet the special requirements of an employer or group of employers that is conducted with a commitment by the employer to employ one or more individuals; or in the case of incumbent workers, continue to employ an individual on successful completion of the training and for which the employer pays for not less than fifty percent of the training.

Customized training is employer driven and may be provided for an individual employee or a group of employees. Employers requesting customized training are required to complete and sign a Customized Training Agreement. A copy of the agreement will be placed in each participant's case file. An Employed Worker Application will be completed for each participant identified in the employer agreement.

Customized Training may be provided for any of the following reasons:

- a. Introduction of a new technology;
- b. Introduction to new production or service procedure;
- c. Upgrading to a new job that required additional skills or workplace literacy; and
- d. To increase productivity and retention.

The employer is to pay a significant portion of the cost of training, as determined by the CareerSource Board, taking into account the size of the employer and such other factors as the local board determines to be appropriate, which may include the number of employees participating in training, wage and benefit levels of those employees (at present and anticipated upon completion of the training), relation of the training to the competitiveness of a participant, and other employer-provided training and advancement opportunities.

The minimum amount of employer share in the Customize Training depends on the size of the employer:

- a. At least 10 percent of the cost, for employers with 50 or fewer employees;
- b. At least 25 percent of the cost, for employers with 51 to 100 employees; and
- c. At least 50 percent of the cost, for employers with more than 100 employees

Transitional Jobs

Transitional jobs are a new type of work-based training that is allowed under WIOA. Under WIOA, CareerSource has a new tool in the toolbox to help the long-term unemployed. Transitional jobs:

- a. Are time-limited work experiences that are subsidized and are in the public, private, or nonprofit sectors for individuals with barriers to employment who are chronically unemployed or have an inconsistent work history; and
- b. Are combined with comprehensive career planning and supportive services.

The goal of transitional jobs is to establish a work history for the individual that demonstrates success in the workplace, and develops the skills that lead to entry into and retention in unsubsidized employment. Unlike OJT, there is no assumption that the individual will be retained in their transitional job after the experience is over, although, that would be a successful experience and outcome. Under section 134(d)(5) of WIOA, CareerSource may use up to 10 percent of its adult and dislocated worker funds to provide transitional jobs to individuals.

CareerSource will use transitional jobs as part of its service delivery strategy. The CareerSource Business Services Team will adopt policies and identify employers (public, private or nonprofit) that can provide quality experiences for individuals to eventually obtain unsubsidized employment. The CareerSource OJT and Supportive Services policies will be used to determine reimbursements for the job; what supportive services should be included; and, any limits on the duration of transitional jobs.

Career Pathways

WIOA requires states and local areas to develop career pathways. The Business Competitiveness Council, which includes economic development organizations, education representatives from secondary and post-secondary schools, will oversee the development of any career pathways and make recommendations to the full Board for approval. Career Pathways are a combination of education, training, career counseling, and support services that align with the skill needs of industries. Career pathways enable an individual to attain a secondary school diploma and a postsecondary credential.

To ensure that they are responsive to the employment and educational needs of Temporary Assistance for Needy Families (TANF) recipients and other low-income individuals, the Business Competitiveness Council will engage additional partners as needed in developing and implementing career pathways models. In addition to training activities, TANF and WIOA funds can also be leveraged where appropriate to provide supportive services (such as child care assistance) that can help low-skilled individuals sustain participation in career pathways programs.

- (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 they meet the needs of local employers, workers and job-seekers (WIOA §108(b)(6)(A)).**

WIOA sec. 134(a)(2)(B), requires that the CareerSource Board must ensure that the State' ETPL is disseminated publicly through the local one-stop system, and its partner programs. The list is a tool to assist CareerSource customers in evaluating training programs and provider options.

The CareerSource Board encourages Training Providers to apply for designation as an Eligible Training Provider (ETP) through its website, social media, and periodic solicitation in publications. In response to a request for an application, the Board provides the application packet that includes the Region's Targeted Occupational List that also designates those occupations deemed to be High Skills/High Wages. Following the receipt of a completed application, Board staff will review the application and make a recommendation to the Business Competitiveness Council to approve/disapprove the application. This decision is made based on:

- a. The training to be provided;
- b. Prior performance of the Training Vendor;
- c. Eligibility to provide contracted services with the state of Florida;
- d. Certification as a Training Provider by the Department of Education or CIE; and
- e. Agreement to provide performance data FETPIP or CIE.

The Eligible Training Provider List and copies of the Regional Targeted Occupational Lists are provided to all One-Stop Center staff within the workforce region. Additionally, these lists are included on the website and maintained in each Resource Room of the CareerSource centers.

Individual Training Accounts can only be issued for training identified as meeting the needs of a Targeted Occupation for the Region; and the provider of the training must be on the Regional Eligible Training Providers List (RETPL).

Workforce Planning Areas

Because of the geographical proximity of the labor market as well as for training vendors in neighboring Workforce Planning Regions, the CareerSource staff do not have discretion when enrolling a student with a Provider that is not on Region 2's RETPL until such time a common application can be developed. However, staff are authorized to issue an ITA for training for an occupation that does not appear on the RTOL but does appear on one of the surrounding regions or on the statewide list, providing the individual is willing to move if necessary to find employment or to commit to an out of the region commute. Impacting this decision is the willingness of the trainee to relocate, if necessary, in order to find employment in a training-related field. However, commuting between Regions in the Workforce Planning Area is considered a natural work commute for individuals seeking employment in northwest Florida.

The Workforce Board will continue to evaluate the performance of existing training vendors as well as to solicit applications for approval as an Eligible Training Provider through its website, social media, publications, and direct solicitations. The Business Competitiveness Council will provide oversight of the Regional Eligible Training Provider List.

The CareerSource Eligible Training Providers will be required to report information on employment and earnings outcomes for all individuals in a program of study. Failure to submit such reports on a

timely and accurate basis will undermine the ability of the CareerSource Board to take such outcomes into account. The Board must ensure the key principles of the ETPL and WIOA are achieved:

- a. Performance accountability;
- b. To meet the needs of local employers and participants, and
- c. To ensure informed customer choice.

The procedure established by WIOA sec. 122(i) provides that the Governor may establish transition procedures under which providers eligible to provide training services under chapter 5 of subtitle B of title I of the Workforce Investment Act of 1998, as such chapter was in effect on the day before the date of enactment of this Act, may continue to be eligible to provide such services until December 31, 2015, or until such earlier date as the Governor determines to be appropriate.

Florida's Policy Number 90, WIOA Eligible Training Provider List, March 1, 2016, updated the above guidance to say: "NOTE: Consistent with TEG 41-14, this Administrative Policy requires all Local Boards to revise their policies for the selection and retention of Eligible Training Providers and Programs to be consistent with WIOA and this Policy no later than June 30, 2016."

This means that all training providers who are currently on the approved Eligible Training Providers list for CareerSource Okaloosa Walton must have their eligibility re-determined no later than June 30, 2016. Below is a summary of the categories and steps that must be taken to be included on the CareerSource Eligible Training Providers List:

- a. Training Providers Already Eligible Before The Transition Period: Training providers eligible to provide training programs under chapter 5 of subtitle B of title I of the Workforce Investment Act of 1998 (WIOA) before the effective starting date of this Policy may continue to provide services up to and during the transition period, but are required to apply for "Continued Eligibility" and be approved before the end of the transition period (June 30, 2016). The eligibility of the providers will be determined under the application procedure for "Continued Eligibility" established by CareerSource Florida, on behalf of the Governor.
- b. Initial Eligibility Pursuant To WIOA: Providers of training programs who are not currently eligible may seek eligibility pursuant to the Workforce Investment Act of 1998 ("WIOA") eligibility requirements before the effective starting date of this Policy.
- c. Initial Eligibility Pursuant To WIOA Starting January 1, 2016: Providers of training programs who are not eligible on the effective starting date of this Policy shall seek eligibility pursuant to the Workforce Innovation and Opportunity Act ("WIOA") "Initial Eligibility" requirements. Providers of training programs seeking "Initial Eligibility" receive "Initial Eligibility" for only one (1) full year, after which they may seek "Continued Eligibility". The provider shall supply verifiable program-specific performance information pursuant to criteria established by the CareerSource Board.
- d. Application: Except for exempt training providers (registered apprenticeships), all applications for WIOA "Initial Eligibility" must be submitted to each of the CareerSource Okaloosa Walton. The training provider must specifically identify the program(s) it intends

to provide to the CareerSource Board in a manner that will permit the Local Board to make a decision on inclusion of the training provider on the Regional ETPL.

- e. Registered Apprenticeship: A provider that receives “Initial Eligibility” for any program shall be subject to all the requirements for that program even after such “Initial Eligibility” expires. Registered apprenticeship programs are not subject to the “Initial Eligibility” criteria or application requirements. While registered apprenticeships are automatically eligible, not all registered apprenticeship programs may want to be included on the list. Registered apprenticeship programs shall automatically be included on the State ETPL until such time as the program: 1) loses its registration; or 2) notifies DEO in writing that it wants to be removed from the ETPL.
- f. Two-Year Renewals: After a training provider has: 1. completed the “Initial Eligibility” period of at least one (1) full year, or; 2. successfully applied under the initial implementation of this Policy as a training provider eligible under V(B)(1), all eligible training providers must submit applications for “Continued Eligibility” every two years to maintain their eligibility. Applications for “Continued Eligibility” must be submitted three (3) months before eligibility expires (except for the initial implementation of this Policy). Once on the ETPL, the “Continued Eligibility” application is required. Removal from the ETPL for a period of time does not return the training program to an “Initial Eligibility” status unless the training provider’s “Continued Eligibility” status was removed.

(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)).

WIOA Youth Program Design

75 Percent Youth Funds Expenditure Rate

Under WIOA, CareerSource was required to spend at least 30 percent of funds to assist eligible out-of-school youth (OSY). Now, under the new WIOA requirements, CareerSource must expend a minimum of 75 percent of youth funds on OSY. This represents a significant shift in the WIOA youth program and will require additional focus on the part of staff.

The OSY expenditure rate is calculated after subtracting the funds spent on administrative costs. The CareerSource administrative costs are not subject to the 75 percent OSY minimum expenditure. For example, if CareerSource receives \$1 million and spends \$100,000 on administrative costs, the remaining \$900,000 is subject to the OSY expenditure rate. In this example, the CareerSource would be required to spend at least \$675,000 (75 percent) of the \$900,000 on OSY.

Framework for the Design of the WIOA Youth Program Services

The foundation for the framework design of the CareerSource WIOA youth program is services that lead toward successful outcomes for the youth participants. This includes:

- a. An objective assessment;

- b. An individual service strategy, which must be update as needed to ensure progression through the program;
- c. Case management; and
- d. Follow-up services.

The CareerSource Board supports the two significant WIOA changes to the requirements for service strategies for youth. The Career Advisors will ensure that the service strategy is linked to one or more of the indicators of performance in WIOA sec. 116(b)(2)(A)(ii); and, the Career Advisors will also ensure that the service strategy identifies career pathways that include appropriate education and employment goals.

For both the objective assessment and individual service strategy, Career Advisors may use recently completed assessments or service strategies conducted by another education or training program rather than create new assessments or service strategies if they determine it is appropriate to do so; and the objective assessment and individual service strategy is not more than six months old effective from the date of enrollment.

The CareerSource Board must ensure the WIOA Youth Program is linked to youth-serving agencies, including human services agencies. In addition, the CareerSource Board must:

- a. Provide eligible youth with information about the full array of applicable or appropriate services available through the CareerSource centers or other eligible providers, or one-stop partners;
- b. Refer eligible youth to appropriate services that have the capacity to serve them on a concurrent or sequential basis;
- c. Ensure that eligible providers refer youth, who either do not meet the enrollment requirements for the program, to appropriate programs to meet the skills and training needs of the participant;
- d. Ensure that eligible providers refer youth, cannot be served by the program for further assessment, if necessary, to appropriate programs to meet the skills and training needs of the participant.;
- e. Also involve specific members of the community, including parents and youth participants, in designing and implementing the WIOA youth program.

Concurrent Enrollment

Career Advisors may allow youth to participate in both the WIOA youth program and the adult program at the same time if they are eligible for both and it is determined to be an appropriate strategy. If such concurrent enrollment occurs, CareerSource must track expenditures separately by program. Note that WIOA eliminated the reference to concurrent enrollment of youth in the dislocated worker program because any youth meeting eligibility for the dislocated worker program would have already successfully attained a job and would most likely be more appropriately served under the dislocated worker program. Youth who are eligible under both

programs may enroll concurrently in WIOA Title I (Workforce Development Activities) and Title II (Adult Education and Literacy) programs.

Determine Program Enrollment for Youth 18-24 Years Old

Young Adults aged 18 to 24 are eligible for the WIOA Adult and Youth Programs and Career Advisors must determine whether to serve these individuals in the youth program, adult program, or both. The CareerSource Board provides that a local youth program must determine whether to enroll an 18- to 24-year old in the youth program or adult program based on the individual's career readiness as determined through an objective assessment.

How Long Must Youth Be Served Before Exiting?

The CareerSource Board provides that WIOA youth are not exited before successfully completing the program due to artificial time constraints, such as, closing the program out at the end of the Program Year or the ending of youth service provider contracts. In order to ensure that youth are not prematurely exited from the WIOA youth program, the CareerSource Board provides that youth programs serve participants for the amount of time necessary to ensure they are successfully prepared to enter post-secondary education and/or unsubsidized employment. While there is no minimum or maximum time a youth can participate in the WIOA youth program, program participation must be linked to a participant's individual service strategy and not the timing of youth service provider contracts or the last day in a Program Year, etc.

WIOA Youth Services

The CareerSource Board will ensure that all 14 WIOA youth programs elements are available to WIOA youth participants. The Career Advisors have the discretion to determine which elements to provide to a participant based on the participant's assessment and individual service strategy.

Below are the 14 WIOA program elements, including 5 new youth program elements in WIOA sec. 129(c)(2) that were not included under WIOA.

- a. Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential;
- b. Alternative secondary school services, or dropout recovery services, as appropriate;
- c. Paid and unpaid work experiences that have as a component academic and occupational education, which may include:
 - 1) Summer employment opportunities and other employment opportunities available throughout the school year;
 - 2) Pre-apprenticeship programs;
 - 3) Internships and job shadowing; and
 - 4) On-the-job training opportunities;

- d. Occupational skills training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area involved, if the local board determines that the programs meet the quality criteria described in section 123;
- e. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- f. Leadership development opportunities, which may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate;
- g. Supportive services;
- h. Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months;
- i. Follow-up services for not less than 12 months after the completion of participation, as appropriate;
- j. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate;
- k. Financial literacy education;
- l. Entrepreneurial skills training;
- m. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- n. Activities that help youth prepare for and transition to postsecondary education and training.

Leveraging Partner Resources to Provide Program Elements

CareerSource may leverage partner resources to provide program elements that are available in the local area. If a local program does not fund an activity with WIOA title I youth funds, the CareerSource must have an agreement in place with the partner to offer the program element and ensure that the activity is closely connected and coordinated with the WIOA youth program if enrolled youth participate in the program element. Closely connected and coordinated means that the Career Advisors must contact and monitor the provider of the non-WIOA-funded activity to ensure the activity is of high quality and beneficial to the youth participant.

Pre-apprenticeship Program

One of the types of work experiences listed under WIOA sec. 129(c)(2)(C) is pre-apprenticeship programs. The reference to pre-apprenticeship programs is new in WIOA. The definition is based on TEN No. 13-12 that defined a quality pre-apprenticeship program. CareerSource youth programs must coordinate pre-apprenticeship programs to the maximum extent feasible with

registered apprenticeship programs, which are defined in WIOA sec. 171(b)(10), and require at least one documented partnership with a registered apprenticeship program.

Quality pre-apprenticeship programs can play a valuable role in preparing individuals for registered apprenticeship and contribute to the development of a diverse and skilled workforce. Pre-apprenticeship programs can be adapted to meet the needs of participants, employers and sponsors they serve, and the specific employment opportunities available in a local labor market. Pre-apprenticeship training programs have successfully demonstrated that obstacles such as low math skills, poor work habits, lack of access to transportation, and lack of knowledge of sector opportunities can be overcome when coordinated training and support is provided to workers.

Adult Mentoring

The adult mentoring program element provides that mentoring must last at least 12 months and defines the mentoring relationship. It clarifies that mentoring must be provided by an adult other than the WIOA youth participant's assigned Career Advisor since mentoring is above and beyond typical case management services. Mentoring may take many forms, but at a minimum must include a youth participant matched with an individual adult mentor other than the participant's Career Advisor. Mentoring services may include group mentoring, mentoring via electronic means, and other forms as long as it also includes individual mentoring from an assigned mentor. CareerSource should use evidence-based models of mentoring to design the mentoring program. USDOL recommends youth programs provide rigorous screening, training, and match support for mentors, and frequent contact with youth and parents as the match progresses.

Financial Literacy Education

The financial literacy program element is new under WIOA. Financial literacy is described in the allowable statewide youth activities in WIOA sec. 129(b)(2)(D) and the proposed section reiterates what was stated in the allowable statewide activities section of supporting financial literacy. CareerSource recognizes the importance of equipping workers with the knowledge and skills they need to achieve long-term financial stability.

Comprehensive Guidance and Counseling

The types of guidance and counseling services that fall under the program element Comprehensive Guidance and Counseling, includes referral to services provided by partner programs, as appropriate. When referring participants to necessary counseling that cannot be provided by the local youth program or its service providers, CareerSource must coordinate with the organization it refers to in order to ensure continuity of service.

Leadership Development Opportunities

An example of leadership development opportunities is included in WIOA regulations. It includes two new examples of appropriate leadership development categories that CareerSource may consider when assigning leadership development activities. One new example is civic engagement activities; the other is activities which put the youth in a leadership role.

Positive Social and Civic Behaviors

While WIOA included positive social behaviors as part of the description of leadership development opportunities, WIOA adds “civic behaviors” to the description of the leadership development program element. Examples of positive social behaviors include keeping informed of community affairs and current events.

Individual Training Accounts for Youth Participants

ITAs have become a proven tool to use for older and OSY to:

- a. Expand training options;
- b. Increase program flexibility;
- c. Enhance customer choice; and
- d. Reduce tracking, reporting and paperwork that come with dual enrollment.

As a result, ITAs have therefore become a critical component in WIOA to provide training services to older and OSY. WIOA does not add much discussion on the use of ITAs for youth participants.

USDOL is proposing to allow ITAs for older OSY aged 18 to 24. This change will enhance individual participant choice in their education and training plans and provide flexibility to the youth program. ITAs also reduce the burden for staff by eliminating duplicative paperwork needed for enrolling older youth in both youth and adult formula programs. ITAs will benefit disconnected youth and reinforce WIOA's emphasis on increasing access to and opportunities for workforce investment services for this population. To the extent possible, the Career Advisors must ensure that youth participants are involved in the selection of their educational and training activities.

Entrepreneurial Skills Training

Entrepreneurial skills' training is a new program element under WIOA. While entrepreneurial skills training was previously listed as an example of a work experience in WIOA, under WIOA it is a separate program element.

Supportive Services for Youth

WIOA includes two additional examples of supportive services for youth which were not listed in WIOA youth regulations. Needs-related payments were listed as an example of an adult supportive service under WIOA but, can be critical to youth living on their own who participate in a youth program. WIOA lists needs-related payments as a supportive service at sec. 3(59).

Assistance with educational testing can provide OSY with the opportunity to take high school equivalency tests, as well as other exams for occupational certifications and credentials, while accommodations may be necessary for youth with disabilities to participate in certain

assessments and to have equal access and opportunity to participate in a variety of work-based learning activities.

Follow-up Services for Youth

WIOA requires that follow-up services for youth are provided for a minimum of 12 months. Follow-up services may be different for each individual based on his or her individual needs. Follow-up services provide the necessary support to ensure the success of youth post-program. Follow-up services are more than just a contact attempted made to gather information for reporting purposes. To meet follow-up requirements, Career Advisors must do more than just make an attempt to contact the individual to gather reporting information.

Work Experience Priority

WIOA sec. 129(c)(4), establishes a 20 percent minimum expenditure requirement on the work experience program element. Work experience is a critical WIOA youth program element, arguably the most important program element as signaled by the minimum expenditure requirement. Work experience helps youth understand proper workplace behavior and what is necessary in order to attain and retain employment. Work experience can serve as a stepping stone to unsubsidized employment and is an important step in the process of developing a career pathway for youth. Research shows work experience is correlated with higher high school graduation rates and success in the labor market. This is particularly important for youth with disabilities.

Tracking the Work Experience Priority

Under WIOA, the CareerSource youth program must use not less than 20 percent of the funds allocated to the local area to provide youth participants, both in-school youth and OSY, with paid and unpaid work experiences. In order to ensure the CareerSource WIOA youth programs meet this requirement, USDOL proposes that local WIOA youth programs track program funds spent on paid and unpaid work experiences and report such expenditures as part of the local WIOA youth financial reporting.

Program expenditures on the work experience program element include wages as well as staffing costs for the development and management of work experiences. Like the 75 percent OSY expenditure requirement, CareerSource administrative costs are not subject to the 20 percent minimum work experience expenditure requirement. The work experience expenditure rate is calculated after subtracting out funds spent on administrative costs and is calculated based on remaining total local area youth funds rather than calculated separately for in-school and OSY.

Work Experience Element

The work experience program element uses language similar to WIOA regulation and includes the four work experience categories listed in WIOA sec. 129(c)(2)(C). In addition, the section eliminates the language under the corresponding WIOA rule that OJT is not an appropriate work experience activity for youth. WIOA sec. 129(c)(2)(C)(4) explicitly enumerates OJT opportunities as one type of work experience.

Work experiences are designed to enable youth to gain exposure to the world of work and its requirements. Work experiences should help youth acquire the personal attributes, knowledge, and skills needed to obtain a job and advance in employment.

Summer Employment Opportunities for Youth

Under WIOA sec. 129(c)(2)(C), summer employment opportunities are one of four suggested components of the paid and unpaid work experience program element. While the CareerSource WIOA youth program must provide paid and unpaid work experiences, they may take the form of a number of activities including:

- a. Summer employment opportunities and employment opportunities available throughout the year;
- b. Pre-apprenticeship programs;
- c. Internships and job shadowing, and
- d. On-the-Job Training.

While summer employment opportunities are an allowable activity and a type of work experience that counts toward the work experience priority (which requires a minimum of 20 percent of funds allocated to a local area to be spent on work experience) they are not a required program element as they previously were under WIOA.

Summer Employment Opportunities Administration

CareerSource must adhere to the provisions outlined in WIOA sec. 123 for selecting service providers when administering summer employment opportunities. WIOA requires CareerSource to identify youth providers of youth workforce investment activities, including work experiences such as summer employment opportunities, by awarding grants or contracts on a competitive basis. As provided in WIOA sec. 123, if there is an insufficient number of eligible providers of youth workforce investment activities, CareerSource may award grants or contracts on a sole source basis. CareerSource does not need to select the employers who are providing the employment opportunities through a competitive process.

Education Offered concurrently within the same Context as Workforce Preparation Activities

This describes the new program element at WIOA sec. 129(c)(2)(E): “education offered concurrently and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.” *The new program element requires integrated education and training to occur concurrently and contextually with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement.* Youth participants will not be required to master basic academic skills before moving on to learning career-specific technical skills. This approach aligns with recent research which found students using an integrated education and training model had better rates of program completion and persistence than a comparison group (Jenkins 2009).

Incentive Payments for Youth Participants

Incentives under the WIOA youth program are permitted. USDOL has included the reference to [2 CFR 200](#) to emphasize that while incentive payments are allowable under WIOA, the incentives

must be in compliance with the requirements in [2 CFR part 200](#). The Uniform Administrative Requirements are consolidated into [2 CFR part 200](#). For example, under [2 CFR part 200](#), Federal funds may not be spent on entertainment costs. Therefore, incentives may not include entertainment, such as movie or sporting event tickets or gift cards to movie theaters or other venues whose sole purpose is entertainment.

Parents, Youth, and Other Members of the Community Involvement in the Design and Implementation of Local Youth Programs

The requirement in WIOA sec. 129(c)(3)(C) for the involvement of parents, participants, and community members in the design and implementation of the WIOA youth program, provides examples of the type of involvement that would be beneficial. USDOL has also included the requirement in WIOA sec. 129(c)(8) that the CareerSource Board must also make opportunities available to successful participants to volunteer to help participants as mentors, tutors, or in other activities.

In-School Youth Definition

The term “in-school youth” means an individual who is—

- a. Attending school (as defined by State law);
- b. Not younger than age 14 or (unless an individual with a disability who is attending school under State law) older than age 21;
- c. A low-income individual (Also includes a youth living in a high poverty area); and
- d. One or more of the following
 - (1) Basic skills deficient;
 - (2) An English language learner;
 - (3) An offender;
 - (4) A homeless individual (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e–2(6))), a homeless child or youth (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))), a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under section 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement;
 - (5) Pregnant or parenting;
 - (6) A youth who is an individual with a disability;
 - (7) An individual who requires additional assistance to complete an educational program or to secure or hold employment.

Out-Of-School Youth Definition

The term “out-of-school youth” means an individual who is—

- a. Not attending any school (as defined under State law);
- b. Not younger than age 16 or older than age 24; and

c. One or more of the following:

- (1) A school dropout;
- (2) A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter;
- (3) A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is:
 - (a) Basic skills deficient; or
 - (b) An English language learner.
- (4) An individual who is subject to the juvenile or adult justice system;
- (5) A homeless individual (as defined in section 41403(6) of the Violence;
- (6) Against Women Act of 1994 (42 U.S.C. 14043e–2(6))), a homeless child or youth (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a (2))), a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under section 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement;
- (7) An individual who is pregnant or parenting;
- (8) A youth who is an individual with a disability;
- (9) A low-income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

- 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 sufficiently 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).

Eligible youth as defined by WIOA will, upon entering into the CareerSource youth program, be assessed by a Career Advisor. The youth will be required to take a TABE test to determine their academic level.

The Career Advisor will determine skill levels through one-on-one interview and other discussions with the youth; for example, reviewing past work history, etc. Service needs will be determined through one-on-one interactions with the youth. An individual career plan will be developed for the youth and serve a guide for assigning activities.

The primary method for assessment is the TABE test; however, Florida Ready to Work may also be used as a supplemental assessment and remediation tool. An individual who does not achieve a Bronze level on the Work Keys assessment tool should be considered Basic Literacy Skills Deficient.

Deficient in Basic Literacy Skills using the Work Keys means an individual who, at a minimum, meets the definition of Basic Skills Deficient; or is unable to compute or solve problems, read write, or speak English at a level necessary to function on the job, in the individual's family, or in society.

- 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).**

The CareerSource Board has defined “requires additional assistance” to complete an educational program, or to secure and hold employment as:

Youth who have been defined as “At Risk” and in need of additional services to complete training or an education program or need assistance in obtaining or maintaining employment.

Below are examples of youth who may meet this definition:

- a. Youth in households defined as low income or economically disadvantaged;
- b. Youth failing academically, and/or at risk of dropping out of school;
- c. Eligible School Dropouts;
- d. Department of Juvenile Justice (DJJ) involved youth (Youth living with their parents);
- e. Youth in a single parent household;
- f. Youth in Foster Care or aging out of Foster Care;
- g. Youth with disabilities;
- h. Take Stock-in-Children recipients; and
- i. Youth at risk of dropping out of school meeting one or more of the following indicators:
 - (1) Youth that has earned three or more F's for the previous school year;
 - (2) Youth that have more than 21 documented unexcused absences in a school year;
 - (3) Youth two or more years older than their peer group;
 - (4) Youth that have been retained one or more times;
 - (5) Youth that has more than four (4) discipline referrals in a school year;
 - (6) Youth that scored below a 3.5 on the FCAT Writing Assessment;
 - (7) Youth with a Scale Score below a 300 on either the FCAT Reading or Math; and
 - (8) Youth that has attended five (5) or more schools during his/her academic history.

(17) Please include the following attachments with your local plans:

- A. **Executed Memoranda of Understanding for all one-stop partners.**
- B. **Executed Infrastructure Funding Agreements with all applicable WIOA required partners.**

PUBLIC COMMENT PROCESS

Describe the process used, in accordance with the criteria below, to provide opportunities for public comment and input into the two-year modification of the local plan.

- (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)).

The completed Plan was posted to the CareerSource Okaloosa Walton website. An announcement was published in the Northwest Florida Daily News and signs were prominently displayed at the administrative office and centers inviting comment and referring to the website or the administrative Office to obtain copies of the Plan.

- (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 was posted to the CareerSource Okaloosa website Friday, February 9, 2018 through Monday, March 12, 2018. See (1) above for publication of availability.

- (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)).

While being drafted, the Plan was distributed to Board members & partners, which include business and labor representatives, for input.

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

The Plan was distributed to Board members & partners for input.

- (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)).

No comments or recommendations were received during the open comment period.

SIGNATURE PAGE

This plan represents the efforts of CareerSource Okaloosa Walton to implement the Workforce Innovation and Opportunity Act in the following counties:

- Okaloosa County
- Walton County

We will operate in accordance with this plan and applicable federal and state laws, rules, and regulations.

CareerSource Okaloosa Walton Board Chair

Chief Elected Official – Okaloosa County



Signature



Signature

Pamela A. Tedesco

Name (printed or typed)

Graham W. Fountain

Name (printed or typed)

Board Chair

Title

Chairman, Okaloosa County Commissioners

Title

2/7/18

Date

3/6/18

Date

SIGNATURE PAGE

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CareerSource Okaloosa Walton Board Chair

Chief Elected Official – Walton County



Signature



Signature

Pamela A. Tedesco

Name (printed or typed)

W.W. Chapman

Name (printed or typed)

Board Chair

Title

Chair

Title

2/7/18

Date

3/14/18

Date

Board Approved

MAR 13 2018

**Walton County
Board of County Commissioners**

INTERLOCAL AGREEMENT

**OKALOOSA COUNTY BOARD OF COUNTY COMMISSIONERS
WALTON COUNTY BOARD OF COUNTY COMMISSIONERS
AND
OKALOOSA WALTON JOBS & EDUCATION PARTNERSHIP, INC., DBA
CAREERSOURCE OKALOOSA WALTON**

This Agreement made and entered into between the Counties of Okaloosa and Walton, of the State of Florida, (hereinafter referred to as Board or Boards)

WITNESSETH

WHEREAS, the United States Congress has enacted the Workforce Innovation and Opportunity Act, Public Law 113-128, July 1, 2015, (“WIOA”) and charged the State of Florida with the establishment of local Service Delivery Areas; and

WHEREAS, Okaloosa Walton Jobs & Education Partnership, Inc., dba CareerSource Okaloosa Walton (hereinafter referred to as CSOW) has been designated as the Local Workforce Development Area (LWDA) to set policy for the portion of the statewide workforce investment system within the local area; and

WHEREAS, the Counties have been designated as part of the LWDA for the unincorporated and incorporated areas within the confines of their boundaries; and

WHEREAS, a representative of each county’s Board of County Commissioners is encouraged to attend and participate with the LWDA; and

WHEREAS, the Chairman of the Board of County Commissioners is signatory to agreements with the Board and has been authorized to represent the Board; and

WHEREAS, the parties desire to enter into an agreement to engage employers and local and regional partners, such as economic development, education, and other community organizations to prepare an educated and skilled workforce under the WIOA regulations to residents in the LWDA.

NOW, THEREFORE, IT IS MUTUALLY AGREED:

1. Grant Recipient and Administrative Entity: Pursuant to Section 107 (d) (12) (B) (i) (II), WIOA, the Chief Elected Official shall serve as the local grant recipient and the Chief Elected Official hereby designates CAREERSOURCE OKALOOSA WALTON (CSOW) to serve as the Fiscal Agent, and the Grant Recipient for all WIOA funds, as well as those

funds allocated to the Local Workforce Development Area for other workforce related programs by both the Federal and State governments. However, the Chief Elected Official is not relieved of the liability for any misuse of grant funds. CSOW shall disburse such grant funds immediately for workforce investment activities at the direction of the CSOW Board of Directors pursuant to the requirements of the WIOA and for other related programs in the appropriate manner authorized by State and Federal laws. CSOW may solicit and accept grants and donations from sources other than Federal funds made available under the WIOA, and other related legislation.

2. Development of the Local Workforce Services Plan: Pursuant to Section 106 (c) (2) WIOA, the CSOW Board will prepare the local WIOA Plan consistent with Section 108 (a) (b) WIOA. Prior to submittal of the Plan to the Governor, CSOW the Board shall make available copies of the proposed Plan to the public through such means as public hearings and local news media. The CSOW Board will allow members of the CSOW Board and members of the public, including representatives of business and representatives of labor organizations, to submit comments on the proposed Plan to CSOW the Board not later than the end of the 30-day period beginning on the date on which the proposed Plan is made available. CSOW the Board will also include in the local Plan submitted to the Governor any such comments that represent disagreement with the Plan. Following development of the Local Workforce Services Plan, the CSOW Board will submit it to the Governor.
3. Negotiation of Local Performance Standards: Pursuant to Section 116 (c) (2), WIOA, the CSOW Board and will negotiate local performance measures with the Governor.
4. Employment Statistics: The CSOW Board shall assist the Governor in developing the statewide employment statistics system described in Section 107 (d) (2) (B) of the Wagner-Peyser Act.
5. Policy Guidance/Oversight: The CSOW Board shall set broad general policy for WIOA programs in partnership with the County, and pursuant to Section 107 (d) (8), WIOA, shall conduct oversight with respect to youth activities, local employment and training activities and the One-Stop delivery system in the local area. Day-to-day monitoring and continuous improvement initiatives administration will be performed by the County.
6. Duties and Responsibilities of the CSOW Board:
 - a. Perform the duties and responsibilities required as Region 02, one of the 24 designated CareerSource/Workforce Boards in Florida
 - b. Develop the local Workforce Investment Opportunity Plan and any modification(s) to the Plan and submit to the local elected officials for approval and in partnership submit approved plans and modifications to the Governor,

- c. Administer federal and state employment and training services
- d. Ensure universal access for workforce services for the residents and businesses of Okaloosa and Walton Counties
- e. Ensure compliance with all federal, state, and local legislation, regulations and policies
- f. Provide periodic updates and copies of the Annual Audit to the Boards of County Commissioners of each county
- g. Perform any other appropriate duties necessary for the accomplishment of and consistent with the purposes of this agreement and Florida's workforce development initiatives

7. Composition and Appointment of the CSOW Board of Directors membership

The CSOW Board of Directors will be comprised of members pursuant to WIOA and State law, 107 2 (A) (i-iii) B (i-iv) C (i-iii) D (i-v).

The majority of the membership must be private sector representatives. Members of the board that represent organizations, agencies, or other entities shall be individuals with optimum policymaking authority with the organizations, agencies or entities. The composition of the membership must generally reflect the racial, gender, and ethnic diversity of the community as a whole. Members shall be appointed for fixed and staggered terms and serve until their successors are appointed

Any vacancy in the membership of the CSOW Board shall be handled in the same procedural manner as the original appointment. Any member appointed to fill the remaining time of the unexpired term of an outgoing member shall be appointed to only the remaining time of the unexpired term. Any member of the CSOW Board may be removed for cause in accordance with procedures established by the CSOW Board By-Laws. In the event a member is removed for cause, CSOW Board will notify the Board of County Commissioners which appointed the member.

All local CareerSource Okaloosa Walton members appointed to the Board must agree to comply with Florida Government in the Sunshine Law, Conflict of Interest Disclosure, and Financial Disclosure requirements as applicable.

Minimum required representation for appointment to the CSOW Board of Directors:

Representing	Okaloosa	Walton	At-Large	Total
Private Sector	5	5	5	15
Economic Development	1	1		2
Education Entities	1	*		1
Post-Secondary Education Institution/Community College			1	1
Vocational Rehabilitation			1	1
Senior Community Service Employment Program			1	1
Community Services Block Grant			1	1
Department of Housing Urban Development			1	1
Community Services Block Grant			1	1
Department of Children and Family Services			1	1
Private Education Institution			1	1
Organized Labor			2	2
Community Based Organization Serving Disabled Individuals			1	1
TOTAL VOTING MEMBERS	7	6	16	29

**Rotation with Okaloosa and Walton Counties Education Entities*

The Board is limited in activity and authority by the provisions of Section 107 (f), WIOA.

8. Designation of Chief Local Elected Official (CLEO):

As required by federal and state legislation, this Agreement will designate the Chief Local Elected Official (CLEO) for 2016-2018 as the Chairman of the Walton County Board of County Commissioners or his/her designee and will then will alternate between the two counties for subsequent years for the duration of this agreement.

In this capacity, the CLEO is designated as the official signatory authority for both counties for the purpose of executing jointly approved documents required for the administration of

the CSOW. Copies of all such signatures and documents will be provided to all other parties to the agreement in an expeditious manner.

9. No Local Funds Requested of Counties

No funds are being requested from the treasuries of any of the parties to this Agreement for the workforce development initiatives; it being the intent thereof that all funding of the workforce development initiatives and CSOW the Board shall be accomplished entirely by grants and funds available pursuant to workforce development initiative programs. CareerSource Okaloosa Walton serves as the Fiscal Agent and Grant Recipient for federal and state workforce funds allocated to the workforce region.

10. One-Stop Operator: Pursuant to section 121(d) (1) The LWDB, with the agreement of the chief elected official, is authorized to designate or certify one-stop operators and to terminate for cause the eligibility of such operators. .

11. Employer Linkages: CSOW The Board shall coordinate the workforce investment activities authorized under by law and carried out in the local area with economic development strategies and develop other employer linkages with such activities.

12. Budget: The CSOW Board shall develop a budget for the purpose of carrying out the duties of the Board under WIOA, subject to the approval of the Chief Elected Official.

13. Standing Committees:107 (b) (4) (A)

A. IN GENERAL. - The local board may designate and direct the activities of standing committees to provide information and to assist the local board in carrying out activities under this section. Such standing committees shall be chaired by a member of the CSOW local board, may include other members of the local board, and shall include other individuals appointed by the local board who are not members of the local board and who the local board determines have appropriate experience and expertise. At a minimum, the local board may designate each of the following:

- i. A standing committee to provide information and assist with operational and other issues relating to the one-stop delivery system, which may include as members representatives of the one-stop partners.
- ii. A standing committee to provide information and to assist with planning, operational, and other issues relating to the provision of services to youth, which shall include community-based organizations with a demonstrated record of success in serving eligible youth.
- iii. A standing committee to provide information and to assist with operational and other issues relating to the provision of services to individuals with disabilities, including issues relating to compliance with section 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.)

regarding providing programmatic and physical access to the services, programs, and activities of the one-stop delivery system, as well as appropriate training for staff on providing supports for or accommodations to, and finding employment opportunities for, individuals with disabilities.

14. Identification of Eligible Providers of Training Services: Consistent with Section 122, WIOA, the CSOW Board shall identify eligible providers of training services described in Section 122 (A-C) WIOA, in the local area.
15. Non-Discrimination: During the performance of this Agreement, the County and CSOW the Board assure, both individually and jointly, that they will not engage in any form or manner of discrimination on the basis of race, color, sex, national origin, handicap, marital status, religion or age in the performance of their individual and/or joint functions under this Agreement. The County and the CSOW Board individually and jointly assure compliance with Title VI of the Civil Rights Act of 1964; Title VII of the 1964 Civil Rights Act, as amended; the Florida Human Rights Act of 1977; and all other applicable Federal and State laws, Executive Orders and regulations prohibiting discrimination as hereinabove referenced. These assurances shall be interpreted to include Vietnam-Era Veterans and Disabled Veterans, as applicable.

Furthermore, the Counties and the CSOW Board individually and jointly understand that this Agreement is conditioned upon the variety of these assurances, and that the County and the CSOW Board members bind themselves to such assurances by execution of this Agreement.

16. Severability: If any terms or provisions of this Agreement or the application thereof to any person or circumstance shall, to any extent be held invalid or unenforceable, the remainder of this Agreement, or the application of such terms or provisions to persons or circumstances other than those as to which it is held invalid or enforceable, 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 law.
17. Board Attestation: The CSOW Board represents and warrants that its members have not offered or given any gratuity to any official employee or agent of the Counties or any political party, with the purpose or intent of securing an agreement or securing favorable treatment with respect to the awarding or amending of an agreement or the making of any determinations with respect the performance of an agreement, and that each member has read and is familiar with this provision.

18. Duration of Agreement

This Agreement shall replace an existing agreement in effect from the period date of the Agreement approved by both parties through June 30, 2016 and remain in effect for the geographical area identified herein from the date of approval through June 30, 2020 unless it is replaced by a new Interlocal Agreement.

19. Effective Date

This Agreement shall be effective on the date the Agreement is approved by both parties, whichever event occurs last.

20. Signatures

Evidence of approval of this Agreement by both Boards of County Commissions of Okaloosa and Walton Counties is indicated by the signature of the authorized parties.

IN WITNESS WHEREOF, the parties hereto, by and through the undersigned, have entered into this Agreement on the date and year first written above.

CHAIRMAN
OKALOOSA WALTON JOBS &
EDUCATION PARTNERSHIP, INC dba
CAREERSOURCE OKALOOSA WALTON



Pamela A. Tedesco

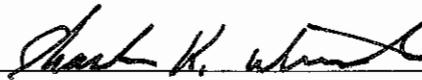
5/4/16
DATE

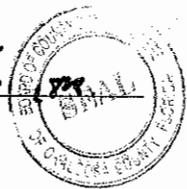
ATTEST: LINDA SUMBLIN, EXECUTIVE
DIRECTOR



6/24/2016
DATE

CHAIRMAN
BOARD OF COUNTY COMMISSIONERS
OF OKALOOSA COUNTY





6/30/16
DATE

CHAIRMAN
BOARD OF COUNTY COMMISSIONERS
OF WALTON COUNTY



June 14, 2016
DATE



MEMORANDUM OF UNDERSTANDING

BETWEEN

CAREERSOURCE OKALOOSA WALTON

AND

EMERALD COAST TECHNICAL COLLEGE

Signature Coordination

MEMORANDUM OF UNDERSTANDING

BETWEEN

**CAREERSOURCE OKALOOSA WALTON
AND
EMERALD COAST TECHNICAL COLLEGE**

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and the **Emerald Coast Technical College (ECTC)**, hereinafter referred to as **The Partner**; a training provider of an **Adult Education and Family Literacy Act Program** and **Carl D. Perkins Career and Technical Education programs**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
- E. The parties to this MOU 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.

- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:

1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: (Reference TEGL 16-16)

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

a. Department of Labor

(1) Workforce Development Activities (WIOA Title I);

(a) Youth Workforce Investment Activities;

(b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);

(3) Trade Adjustment Assistance (TAA) Program;

(4) Unemployment Compensation (UC) Programs;

(5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

(6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

(1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

(2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

(3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

(4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

(1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;

- g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed; and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
- i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
- j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
- k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
- l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.
- B. WIOA requires partner programs to make their services available through the one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
 1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 2. 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 delivery system.
 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 4. Maintain the statewide “CSOW” branding for each career center.
 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.

10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission, and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.

4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.
5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. 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.
- B. CSOW expects to receive referrals from one-stop partner programs and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.

9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in WIOA sec. 121(h)(4); and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software, and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant to access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.
- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software, and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant to access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on July 1, 2017, 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. The Partners agree to review this MOU no less than once each Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV. GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

MOU – CareerSource Okaloosa Walton and **Emerald Coast Technical College**

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY:

CareerSource Okaloosa/Walton

By:

Michele Burns

Name: Michele Burns

Title: Executive Director

Date:

6/28/17

APPROVED BY PARTNER:

Emerald Coast Technical College

By:

Charlie Morse

Name: Charlie Morse

Title: Director

Date: June 28, 2017

APPROVED BY:

Chief Elected Official for Okaloosa and Walton Counties

By:

Cecilia Jones

Name: Cecilia Jones

Title: Chairwoman

Date: Sept 18, 2017



MEMORANDUM OF UNDERSTANDING

BETWEEN

CAREERSOURCE OKALOOSA WALTON

AND

EMERALD COAST TECHNICAL COLLEGE

Signature Coordination

Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), dated 9/18/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Emerald Coast Technical College (ECTC)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

III. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: Emerald Coast Technical College
By: <u>Michele Burns</u>	By: <u>Charlie Morse</u>
Name: <u>Michele Burns</u>	Name: <u>Charlie Morse</u>
Title: <u>Executive Director</u>	Title: <u>Director</u>
Date: <u>12/7/17</u>	Date: <u>12/7/17</u>

APPROVED BY: Walton County Board of County Commissioners	Board Approved
By: <u>Will Chapman</u>	DEC 19 2017
Name: <u>W N Chapman</u>	Walton County Board of County Commissio
Title: <u>Chairman</u>	
Date: <u>12/20/17</u>	

MEMORANDUM OF UNDERSTANDING

BETWEEN

CAREERSOURCE OKALOOSA WALTON

AND

FLORIDA DEPARTMENT OF EDUCATION, DIVISION OF BLIND SERVICES

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and the **Florida Department Of Education (DOE), Division of Blind Services (DBS)**, hereinafter referred to as **The Partner**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
- E. The parties to this MOU 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.

- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:
 - 1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
 - 2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
 - 3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
 - 4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
 - 5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: *(Reference TEGL 16-16)*

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and

employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

a. Department of Labor

(1) Workforce Development Activities (WIOA Title I);

- (a) Youth Workforce Investment Activities;
- (b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);

- (3) Trade Adjustment Assistance (TAA) Program;
- (4) Unemployment Compensation (UC) Programs;
- (5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

- (6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

- (1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

- (2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

- (3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

- (4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

- (1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

- a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;

- g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed; and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
- i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
- j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
- k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
- l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.
- B. WIOA requires partner programs to make their services available through the one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
 - 1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 - 2. 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 delivery system.
 - 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 - 4. Maintain the statewide "CSOW" branding for each career center.
 - 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 - 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 - 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 - 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.

10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.

4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.
5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program needs to ensure that high quality and convenient services are available to potentially eligible customers of the one-stop system.
- B. CSOW expects to receive referrals from one-stop partner programs, and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.

9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in WIOA sec. 121(h)(4); and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant for access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.
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X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on the date signed by both the Department and Contractor, whichever is later, through June 30, 2018, and will be renewed annually for successive one-year terms upon written agreement. The Partners agree to review this MOU no less than once each Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
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 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV. GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: Florida Department of Education
By: <u>Michele Burns</u>	By: <u>Pam Stewart</u>
Name: <u>Michele Burns</u>	Name: <u>Pam Stewart</u>
Title: <u>Executive Director</u>	Title: <u>Commissioner of Education</u>
Date: <u>1/6/18</u>	Date: <u>2/1/18</u>

APPROVED BY: Chief Elected Official for Okaloosa County	APPROVED BY PARTNER: Division of Blind Services
By: _____	By: <u>Robert L. Doyle, III</u>
Name: _____	Name: <u>Robert L. Doyle, III</u>
Title: _____	Title: <u>Director</u>
Date: _____	Date: <u>1/17/18</u>

Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), dated 9/18/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Florida Division of Blind Services (DBS)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018, or the date last executed by both parties, whichever is later. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

Remainder of this page left intentionally blank.

V. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY:
CareerSource Okaloosa/Walton

APPROVED BY PARTNER:
Florida Division of Blind Services

By: Michele Burns

By: Pam Stewart

Name: Michele Burns

Name: Pam Stewart

Title: Executive Director

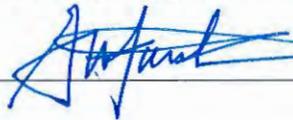
Title: Commissioner of Education

Date: 4/16/18

Date: 2/1/18

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties



By: 

Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/17/18

MEMORANDUM OF UNDERSTANDING

BETWEEN

CAREERSOURCE OKALOOSA WALTON

AND

**THE NATIONAL CAUCUS AND CENTER ON BLACK AGED, INC. –
SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM (SCSEP)**

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and **The National Caucus and Center on Black Aged, Inc.**, hereinafter referred to as **The Partner**; administers the **Senior Community Service Employment Program (SCSEP)**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
- E. The parties to this MOU 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.

- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:

1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS:

(Reference TEGL 16-16)

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

a. Department of Labor

(1) Workforce Development Activities (WIOA Title I);

(a) Youth Workforce Investment Activities;

(b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);

(3) Trade Adjustment Assistance (TAA) Program;

(4) Unemployment Compensation (UC) Programs;

(5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

(6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

(1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

(2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

(3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

(4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

(1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;

- g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed;
and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
- i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
- j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
- k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
- l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.
- B. WIOA requires partner programs to make their services available through the one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 2. 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 delivery system.
 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 4. Maintain the statewide "CSOW" branding for each career center.
 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.

10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.

4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.
5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program needs to ensure that high quality and convenient services are available to potentially eligible customers of the one-stop system.
- B. CSOW expects to receive referrals from one-stop partner programs, and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.

9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in *WIOA sec. 121(h)(4)*; and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in *WIOA sec. 121(i)* and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant for access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.
- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant for access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on July 1, 2017, 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. The Partners agree to review this MOU no less than once each Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

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APPROVED BY:
CareerSource Okaloosa/Walton

APPROVED BY PARTNER:
The National Caucus and Center on Black Aged, Inc.

By: Michele Burns

By: Pauline Mills

Name: Michele Burns

Name: Pauline Mills

Title: Executive Director

Title: Program Coordinator

Date: 7/31/17

Date: 7/28/17

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: Carolyn N. Ketchel



Name: Chairman, Board of Okaloosa County Commissioners

Title: _____

Date: 9/20/17

Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), dated 9/18/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and **The National Caucus and Center on Black Aged (NCCBA), Inc.**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

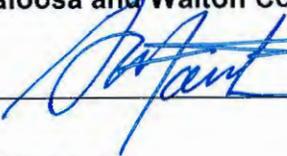
The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

III. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: The National Caucus and Center on Aged, Inc.
By: <u>Michele Burns</u>	By: <u>Pauline Mills</u>
Name: <u>Michele Burns</u>	Name: <u>Pauline Mills</u>
Title: <u>Executive Director</u>	Title: <u>Program Coordinator</u>
Date: <u>11/20/17</u>	Date: <u>11/20/17</u>

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: 

Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/17/18



MEMORANDUM OF UNDERSTANDING

BETWEEN

**CAREERSOURCE OKALOOSA WALTON
AND
NORTHWEST FLORIDA STATE COLLEGE**

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW** and the **Northwest Florida State College (NWFSC)**, hereinafter referred to as **The Partner**; a training provider of an **Adult Education and Family Literacy Act Program** and **Carl D. Perkins Career and Technical Education**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
- E. The parties to this MOU 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.

- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:

1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: (Reference TEGL 16-16)

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

- a. **Department of Labor**

- (1) Workforce Development Activities (WIOA Title I);

- (a) Youth Workforce Investment Activities;

- (b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);

- (3) Trade Adjustment Assistance (TAA) Program;

(4) Unemployment Compensation (UC) Programs;

(5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

(6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

(1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

(2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

(3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

(4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

(1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;
 - g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:

- (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed;
and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
 - i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
 - j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
 - k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
 - l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected

official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.

- B. WIOA requires partner programs to make their services available through the one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 2. 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 delivery system.
 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 4. Maintain the statewide "CSOW" branding for each career center.
 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.
 10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.
4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.

5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program needs to ensure that high quality and convenient services are available to potentially eligible customers of the one-stop system.
- B. CSOW expects to receive referrals from one-stop partner programs, and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.
 9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in *WIOA sec. 121(h)(4)*; and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in *WIOA sec. 121(i)* and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant for access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.
- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant for access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.
- D. Similar to MOUs, CSOW may negotiate an umbrella IFA or individual IFAs for one or more of its One-Stop centers.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on July 1, 2017, 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. The Partners agree to review this MOU no less than once each Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV. GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY:
CareerSource Okaloosa/Walton

By: Michelle Burns

Name: Michele Burns

Title: Executive Director

Date: 6/27/17

APPROVED BY PARTNER:
Northwest Florida State College

By: 

Name: Devin Stephenson

Title: President

Date: 6-27-17

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: _____

Name: Carolyn N. Ketchel

Title: Chairman, Board of Okaloosa County Commissioners

Date: _____

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY:

Chief Elected Official for Okaloosa County

By: Carolyn N. Ketchel
Name: CAROLYN N. Ketchel
Title: Chairman
Date: 20 Sept 2017



Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), dated 9/20/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and **Northwest Florida State College (NWFSC)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

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IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY:

CareerSource Okaloosa/Walton

By: Michele Burns

Name: Michele Burns

Title: Executive Director

Date: 12/6/17

APPROVED BY PARTNER:

Northwest Florida State College

By: Devin Stephenson

Name: Devin Stephenson

Title: PRESIDENT

Date: 11-29-17

APPROVED BY:

Chief Elected Official for Okaloosa and Walton Counties

By: Graham W. Fountain

Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/12/18



MEMORANDUM OF UNDERSTANDING

BETWEEN

**CAREERSOURCE OKALOOSA WALTON
AND
OKALOOSA TECHNICAL COLLEGE**

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and the **Okaloosa Technical College (OTC)**, hereinafter referred to as **The Partner**; a training provider of **Carl D. Perkins Career and Technical Education programs**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
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one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:

1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: (Reference TEGL 16-16)

A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;

2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

a. Department of Labor

- (1) Workforce Development Activities (WIOA Title I);
 - (a) Youth Workforce Investment Activities;
 - (b) Adult and Dislocated Worker Employment and Training Activities.
- Note: Program Administrator – CareerSource Okaloosa Walton*
- (2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);
 - (3) Trade Adjustment Assistance (TAA) Program;
 - (4) Unemployment Compensation (UC) Programs;

- (5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

- (6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

- (1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

- (2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

- (3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

- (4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

- (1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

- a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;
 - g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:

- (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed;
and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
 - i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
 - j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
 - k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
 - l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated with providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected official as the administrative entity, grant recipient, and fiscal agent for the Workforce

Innovation and Opportunity Act (WIOA) of 2014.

- B. WIOA requires partner programs to make their services available through the one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 2. 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 delivery system.
 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 4. Maintain the statewide "CSOW" branding for each career center.
 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.
 10. Provide space for The Partner's meetings and/or co-location as space and funding permits.
 11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
 - b. **Focus.** We remain disciplined by paying constant attention to our vision, mission, and goals;
 - c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
 - d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
 - e. **Action.** We get things done, efficiently and effectively, now;
 - f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
 - g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
 - h. **Innovation.** We constantly seek new and better ways to deliver services;
 - i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
 - j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.
- (d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.
4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in *WIOA sec. 121(h)(4)*; and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software, and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in *WIOA sec. 121(i)* and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant to access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix B.

5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. 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.
- B. CSOW expects to receive referrals from one-stop partner programs and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.
 9. Referrals as needed for state licensing/certifications required for employment.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.

- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.

- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software, and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant to access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on July 1, 2017, 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. The Partners agree to review this MOU no less than once each

Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV. GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's

Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

MOU – CareerSource Okaloosa Walton and Okaloosa Technical College

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY:

CareerSource Okaloosa/Walton

By:

Michele Burns

Name:

Michele Burns

Title:

Executive Director

Date:

6/26/17

APPROVED BY PARTNER:

Okaloosa Technical College

By:

Jerry Saxson

Name:

Jerry Saxson

Title:

Principal

Date:

6-27-17

APPROVED BY:

Chief Elected Official for Okaloosa and Walton Counties

By:

Carolyn N. Ketchel

Name:

Carolyn N. Ketchel

Title:

Chairman, Board of Okaloosa County Commissioners

Date:

20 Sept 20 17



Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU) dated 9/20/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Okaloosa Technical College (OTC)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

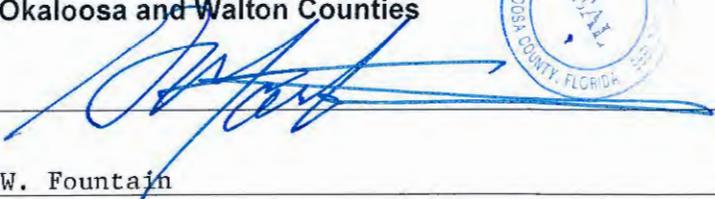
The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

III. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: Okaloosa Technical College
By: <u>Michelle Burns</u>	By: <u>Jerry Sanson</u>
Name: <u>Michele Burns</u>	Name: <u>Jerry Sanson</u>
Title: <u>Executive Director</u>	Title: <u>Director</u>
Date: <u>11/13/17</u>	Date: <u>11-27-17</u>

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: 

Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/17/18



MEMORANDUM OF UNDERSTANDING

BETWEEN

**CAREERSOURCE OKALOOSA WALTON
AND
TRI-COUNTY COMMUNITY COUNCIL, INC.**

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and the **Tri-County Community Council, Inc.**, hereinafter referred to as **The Partner**; administers the **Community Services Block Grant Employment and Training Activities**.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.
- E. The parties to this MOU 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.

- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:

1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: (Reference TEGL 16-16)

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

a. Department of Labor

- (1) Workforce Development Activities (WIOA Title I);
 - (a) Youth Workforce Investment Activities;
 - (b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);
- (3) Trade Adjustment Assistance (TAA) Program;

(4) Unemployment Compensation (UC) Programs;

(5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

(6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

(1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

(2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

(3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

(4) Florida Division of Blind Services.

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

(1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

(2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:
 - a. These services include referrals to partner programs, initial assessments, and labor exchange services;
 - b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
 - d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
 - e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
 - f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;
 - g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:

- (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed;
and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
 - i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
 - j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
 - k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
 - l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated with providing this assistance may be paid for by the State's unemployment insurance program, or the WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected

official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.

- B. WIOA requires partner programs to make their services available through the one-stop delivery system and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 2. 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 delivery system.
 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 4. Maintain the statewide "CSOW" branding for each career center.
 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 9. Commit to a unified, collaborative marketing strategy that will effectively inform job seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.
 10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission, and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.
3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.
4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.

5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. 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.
- B. CSOW expects to receive referrals from one-stop partner programs and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.
 8. Child Care referrals as needed.
 9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in WIOA sec. 121(h)(4); and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software, and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant to access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018, and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs when developing the one-stop operating budget for the local one-stop delivery system.
- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner-Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full-Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant to access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

The Term of this MOU shall commence on July 1, 2017, 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. The Partners agree to review this MOU no less than once each

Program Year; or, if substantial changes have occurred, this MOU will be renewed to ensure appropriate funding and delivery of services. This MOU must be renewed not less than once every three years.

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV. GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's

Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

MOU – CareerSource Okaloosa Walton and Tri-County Community Council, Inc.

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: Tri-County Community Council, Inc.
By: <u>Michele Burns</u>	By: <u>Joel Paul Jr.</u>
Name: <u>Michele Burns</u>	Name: <u>Joel Paul Jr.</u>
Title: <u>Executive Director</u>	Title: <u>Executive Director</u>
Date: <u>June 28, 2017</u>	Date: <u>June 28, 2017</u>

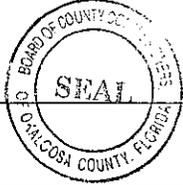
APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: Carolyn N. Ketchel

Name: Carolyn N. Ketchel

Title: Chairman, Board of Okaloosa County Commissioners

Date: 9 | 28 | 17



Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU) dated 9/20/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Tri-County Community Council, Inc.**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

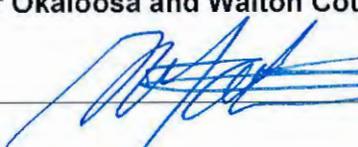
The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

III. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY: CareerSource Okaloosa/Walton	APPROVED BY PARTNER: Tri-County Community Council, Inc.
By: <u>Michelle Burns</u>	By: <u>Joel Paul, Jr.</u>
Name: <u>Michele Burns</u>	Name: <u>Joel Paul, Jr.</u>
Title: <u>Executive Director</u>	Title: <u>Executive Director</u>
Date: <u>11/20/17</u>	Date: <u>11/21/2017</u>

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: 

Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/17/18



MEMORANDUM OF UNDERSTANDING
BETWEEN
CAREERSOURCE OKALOOSA WALTON
AND
FLORIDA DEPARTMENT OF EDUCATION (DOE) - DIVISION OF VOCATIONAL
REHABILITATION

I. PARTIES

This Memorandum of Understanding ("MOU"), is made pursuant to the Workforce Innovation and Opportunity Act (WIOA) of 2014 ("the Act"), and is entered into between **CareerSource Okaloosa Walton (CSOW)**, hereinafter referred to as **CSOW**; and the **Florida Department Of Education (DOE) - Division Of Vocational Rehabilitation (DVR)** hereinafter referred to as **The Partner**; the State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

II. PURPOSE

- A. The Act 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 the Act.
- B. The primary purpose of this Memorandum of Understanding (MOU) is to establish the roles and responsibilities of the Local CareerSource Board, the chief elected official (CEO), and the One-Stop partners as it relates to managing the American Job Center network. In short, this MOU is a description of how the agencies come together to operationalize their respective roles and responsibilities to ensure a seamless and effective "one-stop" delivery system.
- C. More specifically, this MOU describes the cooperative workforce employment and training efforts of CSOW and The Partner; and the actions to be taken by each to assure the coordination of their efforts in accordance with Federal and state issued requirements in order to establish and maintain an effective and successful American Job Center network.
- D. This MOU is also intended to coordinate resources and services between all Partners in order to prevent duplication of services and ensure the effective and efficient delivery of workforce services in Okaloosa and Walton Counties. In addition, this MOU will establish joint processes and procedures that will enable Partners 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 its citizens, including persons with disabilities, within Okaloosa and Walton Counties.

- E. The parties to this MOU 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.
- F. WIOA provides that CSOW may negotiate an umbrella MOU or an individual MOU for one or more of its one-stop partners.

III. GOVERNANCE, OPERATIONS, AND SERVICE DELIVERY ROLES

- A. WIOA has established specific governance, operations, and service delivery roles within the American Job Center network. In accordance with 20 CFR 678.420, 34 CFR 361.420, and 34 CFR 463.420, each required one-stop partner program must:
 - 1. Provide access to its programs or activities through the American Job Center network, in addition to any other appropriate locations (i.e., affiliated or specialized sites);
 - 2. Use a portion of its funds, to the extent consistent with the relevant authorizing statute and with the Uniform Guidance at 2 CFR parts 200, 2900, and 3474 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable) to:
 - a. Provide applicable career services; and
 - b. Work collaboratively with the Local CareerSource Board to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure costs through partner contributions.
 - 3. Enter into an MOU that meets the requirements of 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b) with the Local CareerSource Board relating to the operation of the American Job Center network;
 - 4. Participate in the operation of the American Job Center network consistent with the terms of the MOU, requirements of authorizing laws and implementing regulations, Federal cost principles, and all other applicable legal requirements; and
 - 5. Provide representation on the Local CareerSource Board as required, and participate in Board committees, as needed.

IV. WIOA VISION FOR THE AMERICAN JOB CENTERS OR CAREER CENTERS: (Reference TEGL 16-16)

- A. Through the American Job Centers, partner programs and their direct service providers ensure businesses and all job seekers—a shared client base across the multiple programs—have access to information and services that lead to positive educational and

employment outcomes. Under WIOA, American Job Centers or Career Centers and partner staff strive to:

1. Provide job seekers with the skills and credentials necessary to secure and advance in employment with wages that sustain themselves and their families;
2. Provide access and opportunities to job seekers, including individuals with barriers to employment, as defined in section 3(24) of WIOA, such as individuals with disabilities, individuals who are English language learners, and individuals who have low levels of literacy, to prepare for, obtain, retain, and advance in high-quality jobs and high-demand careers;
3. Enable businesses and employers to easily identify and hire skilled workers and access other human resource assistance, including education and training for their current workforce, which may include assistance with pre-screening applicants, writing job descriptions, offering rooms for interviewing, and consultation services on topics like succession planning and career ladder development, and other forms of assistance.
4. Participate in rigorous evaluations that support continuous improvement of American Job Centers by identifying which strategies work better for different populations; and
5. Ensure that high-quality integrated data inform decisions made by policy makers, employers, and job seekers.

V. ONE-STOP PARTNER PROGRAMS AND SERVICES

A. Programs

1. All required partners must sign a joint MOU with CSOW with the agreement of the chief elected official. The required One-Stop partners in Okaloosa and Walton Counties and programs include (*Reference: Section 121(b)(1)(B) and 20 CFR 678.400*):

- a. **Department of Labor**

- (1) Workforce Development Activities (WIOA Title I);

- (a) Youth Workforce Investment Activities;

- (b) Adult and Dislocated Worker Employment and Training Activities.

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Wagner-Peyser (WP) Act Employment Services (WIOA Title III);

- (3) Trade Adjustment Assistance (TAA) Program;
- (4) Unemployment Compensation (UC) Programs;
- (5) Jobs for Veterans State Grant (JVSG) Programs;

Note: Program Administrator – CareerSource Okaloosa Walton

- (6) The Senior Community Service Employment Program (SCSEP);

Note: Program Administrator – The National Caucus and Center on Black Aged, Inc.

b. Department of Education

- (1) Adult Education and Literacy Act Programs (WIOA Title II);

*Note: Program Administrators: (1) Northwest Florida State College;
(2) Emerald Coast Technical College*

- (2) Career and technical education programs at the post-secondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006;

Note: Program Administrators: (1) Northwest Florida State College; (2) Emerald Coast Technical College; and (3) Okaloosa Technical College

- (3) The State Vocational Rehabilitation Services Program authorized under Title I of the Rehabilitation Act Of 1973 (29 U.S.C.720 et seq.), as amended by WIOA Title IV.

Note: Program Administrator: DOE-Division of Vocational Rehabilitation

- (4) Florida Department of Education - Division of Blind Services

Note: Program Administrator: DOE-Division of Blind Services

c. Department of Health and Human Services

- (1) Temporary Assistance for Needy Families (TANF) authorized under part A of title IV of the Social Security Act;

Note: Program Administrator – CareerSource Okaloosa Walton

- (2) Community Services Block Grant (CSBG) - Employment and training activities.

Note: Program Administrator – Tri-County Community Council, Inc.

2. Additional One-Stop Partners

- a. Social Security Administration - Ticket-to-Work self-sufficiency program.

Note: Program Administrator – CareerSource Okaloosa Walton

- b. Department of Agriculture - Supplemental Nutrition and Assistance Program (SNAP).

Note: Program Administrator – CareerSource Okaloosa Walton

B. Services

1. WIOA places a great deal of importance on effectively serving those individuals with barriers to employment, such as individuals with disabilities. WIOA establishes basic career services that should be available to all one-stop customers. At a minimum, the basic career services listed below must be provided through the one-stop delivery system:

- a. These services include referrals to partner programs, initial assessments, and labor exchange services;
- b. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
- c. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system;
- d. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and need for supportive services;
- e. Labor exchange services, including:
 - (1) Job search and placement assistance, and, when needed by an individual, career counseling, including:
 - (a) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and
 - (b) Provision of information on nontraditional employment; and,
 - (2) Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;

- f. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs;
- g. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - (1) Job vacancy listings in labor market areas;
 - (2) Information on job skills necessary to obtain the vacant jobs listed; and,
 - (3) Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- h. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;
- i. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
- j. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for Temporary Assistance for Needy Families, and other supportive services and transportation provided through that program;
- k. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and
- l. Provision of information and assistance regarding filing claims for unemployment compensation, by which the Career Center must provide meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation.
 - (1) Meaningful assistance means:
 - (a) Providing assistance on-site using staff who are well-trained in unemployment compensation claims filing and the rights and responsibilities of claimants; or
 - (b) Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - (c) The costs associated in providing this assistance may be paid for by the State's unemployment insurance program, or the

WIOA adult or dislocated worker programs, or some combination thereof these funding sources.

VI. PROVISION OF SERVICES

- A. CareerSource Okaloosa Walton (CSOW) has been designated by the chief elected official as the administrative entity, grant recipient, and fiscal agent for the Workforce Innovation and Opportunity Act (WIOA) of 2014.
- B. WIOA requires partner programs to make their services available through the one-stop delivery system, and encourages increasing access through additional partnerships with optional partners. Additionally, WIOA requires CSOW and the One-Stop system partners to develop a memorandum of understanding concerning the operations of the one-stop system; and establishes the framework for providing services to employers, employees, job seekers and others needing workforce services.
- C. CSOW agrees to perform the following functions under this MOU:
 - 1. Review this MOU annually and solicit feedback from The Partner regarding improvements, changes, and/or additions.
 - 2. 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 delivery system.
 - 3. Agree to provide the following office needs as space allows: Cubicle space, chair, applicable computer/hardware and general software, telephone access, utilities, server/internet connectivity and maintenance and other general office usage needs as applicable.
 - 4. Maintain the statewide "CSOW" branding for each career center.
 - 5. Maintain the U.S. Department of Labor American Job Center (AJC) branding for each career 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 8:00 a.m. until 4:00 p.m., Monday through Friday (excluding recognized holidays and emergency situations).
 - 7. Provide training to the partner staff members in an effort for all partners in the one-stop delivery system to understand each partner organization, their services, and their goals.
 - 8. Share Labor Market Information (LMI) and employer/customer data such as performance outcomes to the extent allowed by law.
 - 9. Commit to a unified, collaborative marketing strategy that will effectively inform job

seekers, training and education seekers, employers, and the community at large about the services available through the one-stop system in Okaloosa and Walton counties.

10. Provide space for The Partner's meetings and/or co-location as space and funding permits.

11. Model for the one-stop delivery system CareerSource Florida's core values:

- a. **Integrity.** We will do the right thing, always;
- b. **Focus.** We remain disciplined by paying constant attention to our vision, mission and goals;
- c. **Collaboration.** We work as a team with people inside the organization and maintain important alliances with partners;
- d. **Diversity.** We value people and realize that a broader range of perspectives generates better solutions;
- e. **Action.** We get things done, efficiently and effectively, now;
- f. **Accountability.** We take personal responsibility and do what is required to reach our goals, together;
- g. **Communication.** We are honest and communicate openly throughout every level of the organization and with stakeholders;
- h. **Innovation.** We constantly seek new and better ways to deliver services;
- i. **Excellence.** We excel at what we do, striving for quality performance individually and as a team;
- j. **Leadership.** We lead the way in implementing globally effective workforce development services by empowering our people to be leaders.

(d) Abide by all applicable CareerSource Florida's policies, rules, and procedures; and applicable Florida statutes and rules.

D. The Partner agrees to perform the following functions under this MOU:

1. Coordinate with CSOW to provide access to its workforce services and programs through the one-stop delivery 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. Coordinate with CSOW 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 delivery system.

3. Provide CSOW with program outcome information for performance data tracking, as made available through reliable sources.
4. Provide feedback to CSOW management regarding the performance of the partnership, including its effectiveness and success.
5. Participate in career center periodic meetings to provide updates on The Partner's programs and procedures to CSOW and other partner staff.

VII. METHODS FOR REFERRALS

- A. Internal cross-referral procedures will be developed and/or reassessed based upon availability of funding, services and program needs to ensure that high quality and convenient services are available to potentially eligible customers of the one-stop system.
- B. CSOW expects to receive referrals from one-stop partner programs, and to refer customers to Partner programs. In order to utilize staff in each program efficiently, responsibilities will be delineated. CSOW accepts that because all program participants may receive individualized services through their respective program, some overlap may occur. Task sharing between programs will ultimately be worked out through communication, cooperation, and collaboration between Program staff, such as career planners or case managers.
- C. All planned services provided by CSOW or The Partner program(s) for participants will be provided by the respective Program staff. All career services provided will be consistent with those identified in this MOU. All of the basic career services included in WIOA will be made available for One-Stop customers, including program participants receiving services through the one-stop delivery system.
- D. To ensure participants receive every opportunity to be successful in their job search efforts, career center staff will offer the below services to participants enrolled in a one-stop system program through direct services or referral where appropriate and allowable:
 1. Referral to housing assistance & other supportive services.
 2. Referrals to the CSOW Veterans Team for services.
 3. Career Coaching and job search assistance.
 4. Personalized instruction to prepare for specific job interviews.
 5. Occupational Training where applicable.
 6. Intervene with potential employers on behalf of specific program participants where appropriate.
 7. Transportation assistance where allowable.

8. Child Care referrals as needed.
9. Referrals as needed for state licensing/certifications required for employment.

VIII. ONE-STOP OPERATING BUDGET

Note: The Operating Budget will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix A.

- A. The one-stop operating budget of the career center or American Job Center is the financial plan to which the one-stop partners, CEO, and CSOW agree in the MOU to achieve their goals of delivering services in Okaloosa and Walton Counties. The operating budget, when developed, will describe how the costs of services provided; and the operating costs of the one-stop system will be funded, including the infrastructure costs for the one-stop system (*WIOA sec. 121(c)(2)(A) and 20 CFR 678.500(b), 34 CFR 361.500(b), and 34 CFR 463.500(b)*).
- B. The one-stop operating budget consists of costs that are specifically identified in the statute. For example, infrastructure costs, as defined in WIOA sec. 121(h)(4); and additional costs, which must include applicable career services and may include shared operating costs and shared services that are related to the operation of the one-stop delivery system, but do not constitute infrastructure costs. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One Stop Center. One Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalent (FTE's) located in the One-Stop and for those partners who are co-located in the One Stop. Full One-Stop center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the One-Stop center includes only those line items relevant for access.
- C. CSOW will ensure the one-stop operating budget is annually reconciled against actual costs incurred and adjusted accordingly. This reconciliation process will ensure the budget reflects a cost allocation methodology that demonstrates how infrastructure costs are charged to each partner in proportion to the partner's use of the one-stop center and relative benefit received.
- D. The one-stop operating budget may be further refined by the one-stop partners, as needed, to assist in tracking their contributions.

IX. INFRASTRUCTURE FUNDING AGREEMENTS (IFA)

Note: The Infrastructure Funding Agreement will be developed and agreed to by January 1, 2018 and will be incorporated into this MOU as Appendix B.

- A. The IFA is an integral part of the CSOW overall one-stop operating budget. The IFA contains all of the infrastructure costs. The other component of the CSOW one-stop operating budget consists of additional costs, which include applicable career services, and may include shared operating costs and shared services. While each of these components covers different cost categories, the CSOW one-stop operating budget would be incomplete if any of these cost categories were omitted. All of the components are necessary to maintain a fully functioning and successful local one-stop delivery system.
- B. The overall one-stop operating budget must be included in the MOU. IFAs are a mandatory component of the local MOU, as described in WIOA sec. 121(c); 20 CFR 678.500; 678.755, 34 CFR 361.500 and 361.755; and 34 CFR 463.500 and 463.755. CSOW will work with each one-stop partner, and CEO to negotiate the IFA costs along with additional costs, when developing the one-stop operating budget for the local one-stop delivery system.
- C. Career services are provided by CSOW staff and Department of Economic Opportunity (DEO) jointly managed staff all funded by WIOA, TAA, UC, Veteran's Services, Wagner Peyser, and Welfare Transition. Career services by nature of their programs are also provided by Vocational Rehabilitation and SCSEP personnel co-located in the One-Stop Center. One-Stop infrastructure costs include the annual lease, liability and property insurance, telephone, software and internet network expense, utilities, facility maintenance, equipment leasing and maintenance, and office supplies. Additional costs are described in WIOA sec. 121(i) and include the IT contract and consulting expense, participant tracking technology contract expense, and a portion of the CSOW IT staff technician's salary and benefits. Cost allocation methodology is based on Full Time Equivalents (FTE's) located in the One-Stop and for those partners who are co-located in the One-Stop. Full One-Stop Center usage costs include all infrastructure costs and additional cost line items. For all other partners who are not located in the One-Stop, but who through technology access CSOW information and services, the methodology for determining each partner's fair share of infrastructure and additional costs of the one-stop center includes only those line items relevant for access. It is the responsibility of CSOW to determine if any services provided by any partner can be exchanged for any portion of that partner's fair share and considered their in-kind contribution.

X. CONFIDENTIALITY OF RECORDS

In the event that either Partner to this MOU obtains access to any records, files, or other information of the other Partner in connection with, or during the performance of this MOU, then that Partner 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 Partner.

XI. TERM

This MOU becomes effective July 1, 2017 through June 30, 2020, and may be renewed for an additional three-year term. This MOU may be terminated for convenience at any time by any party upon thirty (30) days written notice.

Neither this MOU nor any provision hereof may be changed or amended orally, but only by an instrument in writing signed by all of the parties to this MOU

XII. RENEWALS, AMENDMENTS, AND MODIFICATIONS

- A. 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.
- B. WIOA requires renewal of the MOU in certain circumstances. Renewal of the MOU requires all partners to review and agree to all elements of the MOU and re-sign the MOU. For example, any substantial changes, such as changes in one-stop partners, or a change due to the election of a new CEO, will require renewal of the MOU.
- C. Amendment or modification of the MOU only requires the Partners to review and agree to the elements of the MOU that changed.
 - 1. Non-substantive changes to the MOU, such as minor revisions to the budget or adjustments made due to the annual reconciliation of the budget, do not require renewal of the MOU or,
 - 2. When a new IFA is created, the MOU must be updated. For example, a change to the one-stop partner's infrastructure cost contributions requires updating the MOU and does not require renewal of the MOU.

XIII. MERGER

This MOU 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.

XIV. THIRD PARTY BENEFICIARY

The Partners 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 MOU. None of the Partners intend to directly or substantially benefit a third party by this MOU. The Partners agree that there are no third party beneficiaries to this MOU and that no third party shall be entitled to assert a claim against any of the Partners based upon this MOU.

XV.GOVERNANCE

The accountability and responsibility for the one-stop system rest with CSOW. Pursuant to the Act, CSOW shall conduct oversight with respect to the One-Stop delivery system. Any dispute concerning this MOU will be resolved in accordance with CSOW's Grievance/Complaint and Hearing/Appeal Procedures.

XVI. DISPUTE RESOLUTION

- A. If an issue arises involving this MOU, 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, the issue and the resolution will be documented in writing.
- B. If not resolved, the issue and the efforts to resolve will be documented and forwarded to the Executive Director of CSOW and the designated Partner's representative. A joint decision shall be issued within 60 calendar days of receipt.
- C. If dissatisfied with the decision, the dispute may be filed with the State of Florida's Department of Economic Opportunity (DEO) to review concerns and determine resolution. DEO may remand the issue back to the CSOW Executive Director and to the Partner(s) or impose other remedies to resolve the issue.

XVII. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this MOU to be duly executed as of the date set forth below.

Signature page for the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), shared responsibilities for the operations of the American Job Center Network Career Centers:

<p>APPROVED BY: CareerSource Okaloosa/Walton By: <u><i>Michelle Burns</i></u> Name: <u>Michele Burns</u> Title: <u>Executive Director</u> Date: <u>7/28/17</u></p>	<p>APPROVED BY PARTNER: Florida Division Of Vocational Rehabilitation By: <u><i>Pam Stewart</i></u> Name: <u>Pam Stewart</u> Title: <u>DOE Commissioner</u> Date: <u>7/19/17</u></p>
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APPROVED BY:

Chief Elected Official for Okaloosa and Walton Counties

By: Carolyn N. Ketchel 
Name: Carolyn N. Ketchel
Title: Chairman, Board of Okaloosa County Commissioners
Date: 20 Sept 2017

Signature page for the Infrastructure Funding Agreement (Appendix A and B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU) #IA-863, dated 9/20/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Division of Vocational Rehabilitation (DVR)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

This IFA is entered into on the date executed by all parties. This IFA will become effective as of the date of signing by the final signatory below and must terminate June 30, 2020. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

VR is responsible for infrastructure costs in the amount \$10,174.00 annually, based on one FTE in the One Stop. CSOW 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 Appendix B. Upon receipt of the above described invoices, the Partners shall process payments within 30 days.

III. STEPS UTILIZED TO REACH CONSENSUS

The Partner and CSOW 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. CSOW proposed the initial Partner contribution amounts as described in the attached infrastructure costs, Appendix B, 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 terms included in the One-Stop Operating Budget section of the MOU.

IV. IMPASSE RESOLUTION

If Partners in a local area have employed the dispute resolution process outlined in the MOU 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.

Remainder of this page intentionally left blank.

V. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY:
CareerSource Okaloosa/Walton

APPROVED BY PARTNER:
Division Of Vocational
Rehabilitation

By: Michele Burns

By: Allison Flanagan

Name: Michele Burns

Name: Allison Flanagan

Title: Executive Director

Title: Director, Division of Vocational Rehabilitation

Date: 5/2/18

Date: 4/27/18

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: _____

Name: _____

Title: _____

Date: _____

MEMORANDUM OF UNDERSTANDING
NO.: IA-863
BETWEEN
CAREER SOURCE OKALOOSA WALTON (CSOW)
AND
FLORIDA DEPARTMENT OF EDUCATION
DIVISION OF VOCATIONAL REHABILITATION
AMENDMENT NO. 1

Memorandum of Understanding (MOU) number IA-863, entered into by and between CareerSource Okaloosa Walton ("CSOW") and the Florida Department of Education, Division of Vocational Rehabilitation ("Partner") on February 24, 2017 is hereby amended as follows:

1. Attachment I, Infrastructure Funding Agreement, including all appendices thereto, is hereby incorporated in its entirety.

All provisions in the MOU not in conflict with this Amendment remain in full force and effect and are to be performed at the level specified in the MOU.

This Amendment and all its attachments are hereby made a part of the MOU.

This Amendment shall become effective as of the date of the final signatory below.

IN WITNESS WHEREOF, the Parties hereto have caused this Amendment to be executed by their proper and duly authorized representatives.

APPROVED BY:
CareerSource Okaloosa/Walton

APPROVED BY PARTNER:
Department of Education
Division of Vocational Rehabilitation

By: Michelle Burns

By: Allison Flanagan

Name: Michele Burns

Name: Allison Flanagan

Title: Executive Director

Title: Director, Division of Vocational Rehabilitation

Date: 5/2/18

Date: 4/27/18

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: _____

Name: _____

Title: _____

Date: _____

Signature page for the Infrastructure Funding Agreement (Appendix B) to the Workforce Innovation and Opportunity Act (WIOA) Memoranda of Understanding (MOU), dated 9/20/2017, between **CareerSource Okaloosa Walton (CSOW)**, also referred to as **CSOW**; and the **Division of Vocational Rehabilitation (DVR)**, also referred to as **The Partner**.

I. TERM FOR INFRASTRUCTURE COSTS

The Term for this initial Infrastructure Funding Agreement shall commence on January 1, 2018, through June 30, 2018. The Term for subsequent Infrastructure Funding Agreements shall commence on the first day of the Program/Fiscal Year (Currently) July 1 through last day of the Program/Fiscal Year (Currently) June 30. A new Infrastructure Funding Agreement will be developed for each subsequent Program/Fiscal Year.

II. AGREEMENT/PAYMENTS

The Partners agree to the infrastructure costs outlined in Appendix B; and to the Term for this Infrastructure Funding Agreement. Payments may be made monthly, quarterly, or annually at the beginning of each agreed upon period as invoiced by CSOW.

III. SIGNATURES

IN WITNESS WHEREOF, the Partner and CSOW have caused this Infrastructure Funding Agreement to be duly executed as of the date set forth below.

APPROVED BY:
CareerSource Okaloosa/Walton

APPROVED BY PARTNER:
Division Of Vocational
Rehabilitation

By: Michelle Burns

By: _____

Name: Michele Burns

Name: _____

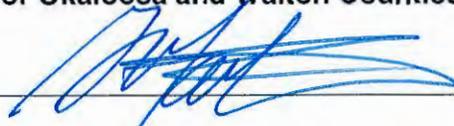
Title: Executive Director

Title: _____

Date: 4/5/18

Date: _____

APPROVED BY:
Chief Elected Official for Okaloosa and Walton Counties

By: 



Name: Graham W. Fountain

Title: Chairman, Board of County Commissioners

Date: 4/17/18

**Appendix A
Infrastructure Costs and Additional OS Expense
Annualized**

	Ft. Walton One Stop Full Center Usage	Technology Usage Access Only
Infrastructure Expense		
Lease	\$181,950	
Liability/Property/Other Insurance	\$10,781	
IT Consulting Contract	\$40,500	\$40,500
IT Technician Portion of Salaries and Benefits 10%	\$4,726	\$4,726
Telephone	\$15,450	
Software and Internet	\$3,528	\$3,528
Utilities	\$26,520	
Facilities Maintenance	\$597	
Equipment Leasing & Maintenance	\$9,618	
Supplies	\$13,319	
Atlas Complete Technology	\$16,049	\$16,049
Total Infrastructure Costs	\$323,038	\$64,803
Additional One Stop Costs		
Career Services Salaries and Benefits	\$666,273	
UCT Tax	\$1,778	
Temp Services and Background Checks	\$9,069	
Record Storage	\$900	
Postage	\$1,404	
Outreach	\$403	
Travel and Professional Development	\$13,916	
Participant Expense	\$350,362	
Equipment	\$8,047	
Fees and Licensing (Atlas Excluded)	\$2,000	
Total Additional One Stop Expense	\$1,054,154	
Total/Total Infrastructure and Additional One Stop Costs	\$1,377,192	

31.75 FTE in FWB One Stop (CSOW/DEO/VR/SEP/VA Work Studies) (1270 Hours)

MOU's			
	Fair Share	Exchange Value	Balance to CSOW
Voc Rehab with 1 FTE in OS (\$323,038/31.75)	\$10,174		\$10,174
SEP with 1 FTE in OS (\$323,038/31.75)	\$10,174	\$10,174	\$0
SEP PT Workers Contribution (13Hr x 52Wks x \$15.05/Hr = \$10,174)			
	Access Fee	Exchange Value	Balance to CSOW
NWFLSC (Perkins and Literacy Programs)-No FTE in OS (\$64,803/31.75)	\$2,041	\$0	\$2,041
OTC--No FTE in OS (\$64,803/31.75)	\$2,041	\$0	\$2,041
ECTC--No FTE in OS (\$64,803/31.75)	\$2,041	\$0	\$2,041
FI Division of Blind Services-No FTE in OS (\$64,803/31.75)	\$2,041	\$2,041	\$0
FI Division of Blind Services--Services provided to 20 CSOW Referrals @ Average of \$102.05 Per Referral = \$2,041			
Community Services Block Grant (Tri County)--No FTE in OS (\$64,803/31.75)	\$2,041	\$2,041	\$0
Community Services Block Grant (Tri County)--Services provided to 40 CSOW Referrals @ Average of \$51.03 per Referral = \$2,041			

\$16,298

**Appendix B
One Stop Budget with All Partners
Annualized**

A. Walton One Stop

	Full Center Usage One Stop FTE % to Total FTE	Technology Usage Amount Only						VTR 1.08 2%	SEY 1.08 1%	WIOA 8.75 21%	WTP 3.50 11%	Wagner Peyster 4.50 14%	Veteran's 10.50 31%	RA/UC 0.5 2%	SNAP 2 6%	Total	
			NWFLSC	OTC	ECTC	FDN/Blind	Tri County										
Infrastructure Expense																	
Lease	\$181,810						\$181,810	\$181,810	\$50,144	\$10,057	\$25,738	\$50,177	\$2,865	\$11,461			\$181,950
Liability/Property/Driver Insurance	\$10,741						\$10,741	\$10,741	\$2,971	\$1,181	\$1,321	\$1,561	\$179	\$679			\$10,781
IT Consulting Contract	\$40,598	\$40,598	\$1,501	\$1,501	\$1,501	\$1,501	\$1,501	\$1,501	\$4,465	\$1,749	\$13,194	\$638	\$2,551				\$46,689
IT Technician Portion of Salary and Benefits 10%	\$4,758	\$4,758	\$175	\$175	\$175	\$175	\$175	\$175	\$521	\$207	\$1,560	\$74	\$298				\$4,758
Telephone	\$11,456						\$11,456	\$11,456	\$4,238	\$1,703	\$2,190	\$5,109	\$243	\$973			\$16,459
Software and Internet	\$1,528	\$1,528	\$111	\$111	\$111	\$111	\$111	\$111	\$972	\$389	\$500	\$1,167	\$56	\$222			\$3,238
Utilities	\$26,521						\$26,521	\$26,521	\$7,309	\$2,923	\$3,739	\$8,770	\$418	\$1,671			\$36,239
Facilities Maintenance	\$49						\$49	\$49	\$165	\$66	\$83	\$197	\$9	\$38			\$197
Equipment Leasing & Maintenance	\$9,819						\$9,819	\$9,819	\$2,653	\$1,059	\$1,363	\$3,181	\$151	\$606			\$9,819
Supplies	\$11,315						\$11,315	\$11,315	\$3,671	\$1,458	\$1,848	\$4,403	\$215	\$839			\$18,319
Atlas Complete Technology	\$16,049	\$16,049	\$591	\$591	\$591	\$591	\$591	\$591	\$4,433	\$1,769	\$2,275	\$5,308	\$253	\$1,011			\$16,049
Total Infrastructure Costs	\$323,038	\$64,803	\$2,041	\$2,041	\$2,041	\$2,041	\$2,041	\$2,041	\$18,174	\$18,174	\$89,024	\$35,610	\$45,785	\$106,831	\$5,887	\$20,349	\$333,243
Exchange Value																	\$0
Fair Share			\$2,041	\$2,041	\$2,041	\$0	\$0	\$10,174	\$0	\$89,024	\$35,610	\$45,785	\$106,831	\$5,887	\$20,349		\$218,987

	Full Center Usage One Stop FTE % to Total FTE	Technology Usage Amount Only						VTR 1.08 2%	SEY 1.08 1%	WIOA 8.75 21%	WTP 3.50 11%	Wagner Peyster 4.50 15%	Veteran's 10.50 35%	RA/UC 0.5 2%	SNAP 2 7%	Total	
			NWFLSC	OTC	ECTC	FDN/Blind	Tri County										
Additional One Stop Costs																	
Cover Services Salaries and Benefits	\$664,271						\$664,271	\$664,271	\$185,963	\$78,333	\$100,211	\$235,153	\$11,490	\$44,791			\$864,373
UCT Tax	\$1,278						\$1,278	\$1,278	\$353	\$149	\$209	\$628	\$30	\$120			\$1,778
Temp Services and Background Checks	\$8,969						\$8,969	\$8,969	\$2,667	\$1,067	\$1,377	\$3,203	\$152	\$510			\$9,069
Record Storage	\$906						\$906	\$906	\$265	\$108	\$136	\$312	\$15	\$51			\$906
Postage	\$1,406						\$1,406	\$1,406	\$413	\$163	\$212	\$468	\$24	\$94			\$1,406
Outreach	\$403						\$403	\$403	\$119	\$48	\$61	\$143	\$7	\$27			\$403
Travel and Professional Development	\$13,914						\$13,914	\$13,914	\$4,039	\$1,637	\$2,109	\$4,912	\$234	\$936			\$18,916
Participant Expense	\$170,363						\$170,363	\$170,363	\$33,654	\$13,454	\$17,540	\$42,648	\$2,049	\$7,800			\$204,363
Equipment	\$8,611						\$8,611	\$8,611	\$2,347	\$947	\$1,237	\$2,840	\$135	\$541			\$8,611
Fees and Licensing (Atlas Excluded)	\$2,904						\$2,904	\$2,904	\$811	\$323	\$430	\$1,068	\$54	\$214			\$2,904
Total Additional One Stop Expense	\$1,654,154		\$0	\$0	\$0	\$0	\$0	\$0	\$524,306	\$215,833	\$286,456	\$748,397	\$11,828	\$47,314			\$1,854,154
Total/Total Infrastructure and Additional One Stop Costs	\$1,777,192		\$2,041	\$2,041	\$2,041	\$0	\$0	\$10,174	\$0	\$113,333	\$151,464	\$112,241	\$355,329	\$16,916	\$67,663		\$1,773,141
% to Total/Total			0.15%	0.15%	0.15%	0.00%	0.00%	0.34%	0.08%	44.67%	11.03%	11.09%	33.87%	1.33%	4.31%		100.00%