



BOARD TRAINING



Welcome

- Members appointed to the Local Workforce Development Board (LWDB) are required to participate in orientation and annual training to ensure they understand the purpose of their participation on the LWDB.
- The purpose of orientation and training to provide LWDB members with information that empowers them to effectively serve as a board member.

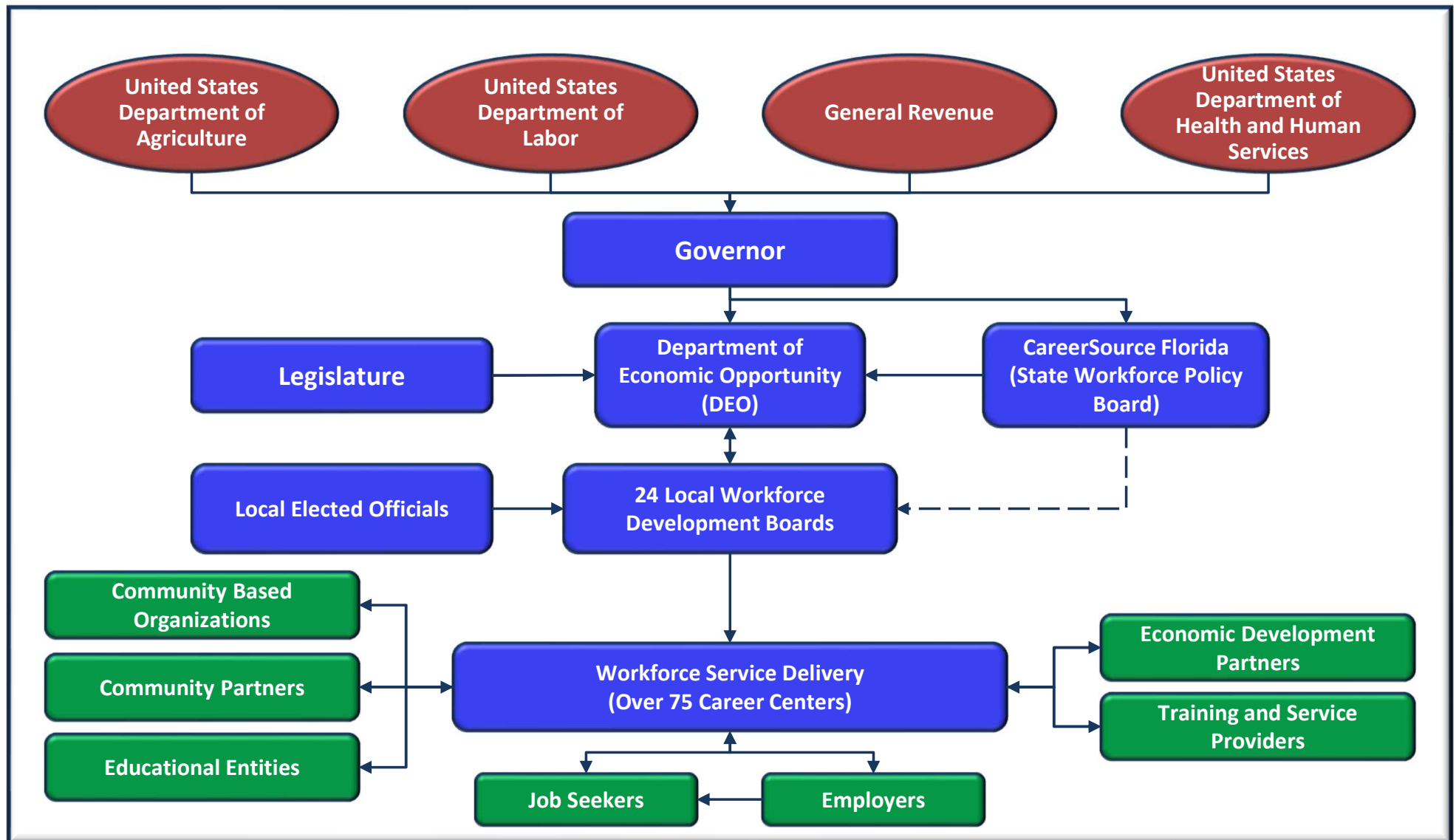
Agenda

- **Overview of WIOA**
 - System structure
 - Funding
 - Partners
 - State and local goals
- **Roles and Responsibilities**
 - CLEO
 - Fiscal Agent
 - LWDB
 - Sunshine Law, Conflict of Interest
 - Board Member Manual
- **Performance and Funding**
 - Budget
 - Performance Indicators, Targeted Sectors, Special Projects

Overview of WIOA

- The Workforce Innovation and Opportunity Act (WIOA) is a federally funded employment and training program. The program is designed to help career seekers access employment, education, training and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy.

Workforce Structure



Federal Workforce Laws

- Workforce Innovation and Opportunity Act of 2014 (WIOA)
 - Federal Law
 - Supersedes the [Workforce Investment Act of 1998](#)
 - Designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy
 - [Public Law No. 113-128](#)

Federal Workforce Laws

- Areas covered under WIOA:
 - Title I – Workforce Development Activities
 - Title II – Adult Education and Literacy
 - Title III – Amendments to the Wagner – Peyser Act
 - Title IV – Amendments to the Rehabilitation Act of 1973
 - Title V – General Provisions

Required Partners and Programs

- Programs authorized under the Wagner-Peyser Act ([29 U.S.C. 49](#) et seq.);
- Adult education and literacy activities authorized under title II;
- Programs authorized under title I of the Rehabilitation Act of 1973 ([29 U.S.C. 720](#) et seq.) (other than section 112 or part C of title I of such Act (29 U.S.C. 732, 741);
- Activities authorized under title V of the Older Americans Act of 1965 ([42 U.S.C. 3056](#) et seq.);
- Career and technical education programs at the postsecondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006 ([20 U.S.C. 2301](#) et seq.);

Required Partners and Programs, continued

- Activities authorized under chapter 2 of title II of the Trade Act of 1974 ([19 U.S.C. 2271](#) et seq.);
- Activities authorized under [Chapter 41 of title 38, United States Code](#);
- Employment and training activities carried out under the Community Services Block Grant Act ([42 U.S.C. 9901](#) et seq.); employment and training activities carried out by the Department of Housing and Urban Development;
- Programs authorized under State unemployment compensation laws (in accordance with applicable Federal law);
- Programs authorized under section 212 of the Second Chance Act of 2007 ([42 U.S.C. 17532](#)); and
- Programs authorized under part A of title IV of the Social Security Act ([42 U.S.C. 601](#) et seq.), subject to subparagraph (C).

CareerSource Florida: Workforce Development System Goals and Strategies

- **Economic Recovery and Growth** — Supporting inclusive economic recovery to help Florida rebound from the effects of COVID-19 including providing local workforce development boards with additional resources to respond to the evolving needs of job seekers, workers and businesses; engaging employers in key industry sectors to better understand the pandemic impact and needed workforce solutions to support their current and emerging recruitment, hiring and training needs and advance career pathways that lead to good jobs; and providing supportive services to Florida postsecondary students who need emergency assistance to complete their education and credential attainment.

CareerSource Florida: Workforce Development System Goals and Strategies

- **Apprenticeship Expansion** — Building capacity through local workforce development boards to enhance local expertise through designated navigators who support apprenticeship expansion in key industry sectors, and strengthening collaboration among local workforce development boards, businesses, state colleges, technical colleges and high schools to increase apprenticeship and pre-apprenticeship opportunities.

CareerSource Florida: Workforce Development System Goals and Strategies

- **Performance and Accountability** — Driving excellence in local workforce development board performance in priority areas including delivering high-value services to employers in key industry sectors important to local and regional economies and improving service delivery, employment and career advancement outcomes for individuals with barriers to employment.

CareerSource Florida: Workforce Development System Goals and Strategies

- **Substance and Re-Entry Navigators** — Helping Floridians who are recovering from abuse of opioids and other drugs through a navigator service model that offers intensive employment and training support to help them rebuild their lives by transitioning into jobs and self-sufficiency.
- **Strengthening Talent Pipeline Strategies for Rural Communities** — Identifying and activating talent solutions for building and retaining a skilled rural workforce through stakeholder convenings, research and action planning, and development of workforce solutions.

Purpose of the LWDB

LOCAL WORKFORCE DEVELOPMENT BOARDS:

- Florida's 24 local workforce development boards are the backbone of the [CareerSource Florida](#) network. These boards — directed by business and other community leaders — work locally and regionally to convene local talent supply stakeholders, develop data-driven strategies, leverage resources and deliver valuable services to meet workforce needs.

Purpose of the LWDB

- The LWDB provides strategic and operational oversight, assists in achievement of the state's strategic and operational vision and goals, and maximizes and continues to improve quality of services, customer satisfaction, and effectiveness of services provided.
- A full list of LWDB functions can be found in [WIOA sec. 107\(d\)](#) and [20 CFR 679.370](#).

Roles and Responsibilities of the Chief Local Elected Official (CLEO)

- Requesting local area designation
- Appointing members to the LWDB
- Requesting LWDB certification
- In coordination with the local board, establishing bylaws
- Serve as grant recipient
- Remaining liable for any misuse of WIOA grant funds by the local area
- In coordination with the local board and/or staff to the board, negotiating and reaching agreement on LWDB local performance measures with the state
- Negotiating with the LWDB and required partners to maintain the workforce delivery system through the Memorandum of Understanding
- Partnering with the LWDB and planning region, if appropriate, to develop and submit the WIOA local plan and regional plan

Roles and Responsibilities of the Fiscal Agent

- The fiscal agent is the entity designated by the CLEO to perform accounting and funds management on behalf of the CLEO. The duties of the fiscal agent may include but are not limited to:
 - a) Receiving funds;
 - b) Ensuring sustained fiscal integrity and accountability for expenditures of funds in accordance with Office of Management and Budget (OMB) circulars, WIOA, corresponding federal regulations, state law, and state policies;
 - c) Responding to audit financial findings;
 - d) Maintaining proper accounting records and documentation;
 - e) Preparing financial reports; and,
 - f) Providing technical assistance to sub-recipients regarding fiscal issues.

Roles and Responsibilities of the LWDB

- The LWDB is appointed by the CLEO in each local area in accordance with state criteria established under [WIOA sec. 107\(b\)](#) and certified by the Governor every two years in accordance with [WIOA sec. 107\(c\)\(2\)](#)
- The LWDB provides strategic and operational oversight, assists in achievement of the state's strategic and operational vision and goals, and maximizes and continues to improve quality of services, customer satisfaction, and effectiveness of services provided. LWDB responsibilities include, but are not limited to:
 - Developing and submitting local and, if applicable, regional plans;
 - Conducting workforce research and regional labor market analysis;
 - Convening local workforce development system stakeholders to assist in the development of the local plan and identify expertise and resources to leverage support for workforce development activities;

Roles and Responsibilities of the LWDB

- Leading efforts to engage a diverse range of employers and other entities in the region;
- Leading efforts to develop and implement career pathways;
- Leading efforts in the local area to identify and promote proven and promising strategies and initiatives for meeting the needs of employers, workers, and jobseekers;
- Conducting oversight of the WIOA adult, dislocated worker, and youth programs and the entire workforce delivery system, ensure the appropriate use and management of WIOA funds, and ensure the appropriate use, management, and investment of funds to maximize performance outcomes;
- Negotiating and reaching agreement on local performance measures with the CLEO and the state;

Roles and Responsibilities of the LWDB

- In partnership with the CLEO, establishing bylaws and codes of conduct for LWDB members, LWDB executive director and staff to the LWDB; and;
- Establishing additional monitoring and reporting requirements if one entity fulfills multiple functions to ensure the entity is compliant with WIOA, final rules and regulations, OMB circulars, and the state's conflict of interest policy.

LWDB Membership and Composition

- Business - A majority of the local board members must represent businesses in the local area
- Labor/Apprenticeships - Not less than 20 percent of the members must be representatives of the workforce within the local area
- Education - Each local board must include representatives of entities administering education and training activities in the local area
- Governmental/Economic/Community Development - Each local board must include representatives of economic and community development as well as governmental entities serving the local area
- Other Entity Representation - Each local board may include other individuals or representatives of entities determined by the Chief Elected Official in the local areas to be appropriate.

Board Composition

WORKFORCE		9		
A. Labor/Apprenticeships (Must be 20% or greater)		4	22%	County
1	Representative of labor organization	Tate Foster	Required	H
2	Representative of labor organization	Lee Middleton	Required	P
3	Representative of joint labor-management organization	Keven Barber	Required	P
4	Representative of community-based organization	Mark Barry	Optional	H
5	Organization that serves veterans		Optional	
6	Organizations supporting individuals with disabilities		Optional	
7	Organization assisting youth		Optional	
8	Union affiliated registered apprenticeship program		Optional	
9	Non-union affiliated registered apprenticeship program		Optional	
B. Education		3		
1	Representative of adult education and literacy activities	Sophia Watson	Required	H
2	Representative of higher education	Timothy Beard	Required	P
3	Representative of private education	Kathryn Starkey	Required	P
4	Representative of local educational agencies or CBO		Optional	
C. Governmental/Economic/Community Development		2		
1	Representative of economic and community development	Turner Arbour	Required	P
2	Representative of Vocational Rehabilitation	John Howell	Required	P
3	Representative of transportation, housing, and public assist		Optional	
4	Representative of philanthropic organizations		Optional	
D. Other Entity Representation		0		
1	Other representatives as determined by CLEO		Optional	
BUSINESS				
E. Business (Must be 51% or greater)		9	50%	
1	Representative of small business	Joelle Neri	Required	P
2	Representative of small business	Dana Cutlip	Required	H
3	Representative of other business	Mark Earl	Optional	H
4	Representative of other business	Lex Smith	Optional	H
5	Representative of other business	Stephanie Adams	Optional	H
6	Representative of other business		Optional	
7	Representative of other business	Bill Woodard	Optional	H
8	Representative of other business	Nils Lenz	Optional	P
9	Representative of other business	Charles Gibbons	Optional	P
10	Representative of other business	Hope Kennedy	Optional	P
Representation Count:		18	Hernando:	44%
Current Board Member Count:		18	Pasco:	56%

Role of Board Members

- Board members play a critical role in ensuring the success of workforce development in their local area
 - Governing body of the organization
 - Establishing general policies and objectives
 - Approving annual budgets
 - Reviewing the annual independent audit and Form 990
 - Reviewing the performance of the Chief Executive Officer

Roles and Responsibilities of the LWDB Chairperson

- The LWDB chairperson is elected by the members of the LWDB and must be one of the business representatives on the board. The LWDB chairperson shall serve a term of no more than two years and shall serve no more than two terms.
- The LWDB chairperson's duties may include but are not limited to:
 - Leading the board to develop a guiding vision that aligns with the state's priorities;
 - Acting as the lead strategic convener to promote and broker effective relationships between CLEOs and economic development, education, and workforce partners in the local area;
 - Leading an executive committee to guide the work of the board, and ensure that committees or task forces have necessary leadership and membership to perform the work of the board; and
 - Leading the agenda setting process for the year and guide meetings to ensure both tactical and strategic work is completed in all meetings.

Roles and Responsibilities of the LWDB President/CEO and Staff

- The LWDB may hire a qualified executive director and staff to assist in ensuring the functions of the local board are achieved. The LWDB must ensure the individual or entity designated as the executive director has the requisite knowledge, skills, and abilities to meet identified benchmarks and to assist in effectively and ethically carrying out the functions of the LWDB which may include, but is not limited to:
 - Coordinating with the CLEOs regarding the identification and nomination of members to the LWDB and ensuring membership is compliant with WIOA and Florida Statutes;
 - Organizing board meetings and ensuring meetings are held according to the LWDB's bylaws and Florida's sunshine laws;
 - Developing and submitting the local and regional workforce development plan; Conducting oversight of the WIOA adult, dislocated worker, youth programs and the entire one-stop delivery system, including development of policies and monitoring the administration of the programs;

Roles and Responsibilities of the LWDB President/CEO and Staff

- Negotiating and reaching agreement on local performance measures;
- Negotiating with CLEO and required partners for the Memorandum of Understanding;
- In compliance with local board procurement policy, provide oversight of the competitive procurement process for procuring or awarding contracts for providers of youth program services, providers of workforce services (if applicable), and the one-stop operator as required in paragraph (I) of [20 CFR 679.370](#);
- Developing a budget for activities of the LWDBs; and
- Certifying the one-stop career centers.

Sunshine Law

- [Chapter 286](#), Florida Statutes, enacted in 1967
- Establishes a basic right of access to most meetings of boards, commissions and other governing bodies of state and local governmental agencies or authorities
- Three basic requirements regarding public board meetings:
 - Must be properly noticed, open to the public, and minutes must be taken
- Includes discussions and deliberations as well as formal action taken by a public board
- Applies to any gathering, whether formal or casual, of two or more members of the same board to discuss some matter on which foreseeable action will be taken by the public board
- Link to current Sunshine manual:
[http://myfloridalegal.com/webfiles.nsf/WF/MNOS-B9QQ79/\\$file/SunshineManual.pdf](http://myfloridalegal.com/webfiles.nsf/WF/MNOS-B9QQ79/$file/SunshineManual.pdf)

Conflict of Interest Policy

- Abstentions due to conflict of interest must be recorded, include the name of the abstaining member, and the reason for abstention.
- The LWDB is subject to open government and confidentiality requirements in [Chapters 119](#) and [286](#), Florida Statutes (F.S).
- Strategic Policy 2012.05.24.A.2 - State and Local Workforce Development Board Contracting Conflict of Interest Policy provides guidelines for approving contracts in which a conflict of interest may exist.

Committee Descriptions

- Executive Committee
 - Composed of the Board Chair, Vice Chair, Treasurer/Secretary, and not more than four additional Directors
 - Meetings are scheduled to alternate with Board meetings
 - All actions by the Committee are reported to the Board of Directors
- Audit and Finance Committee
 - Composed of not less than five Directors
 - Review and approve the organizational budget
 - Review financial statements
 - Review and approve new funding budgets, transfers, and modifications
 - Recommend cancellations of contracts to the Board due to non-performance
 - Communicate with the auditors if necessary

Committee Descriptions

- Nominating Committee
 - Composed of not less than three Directors
 - Develop and implement processes for recruiting, nominating, vetting, and appointing Directors
 - Review nominations for Board Membership

PHWB Budget
7/1/2022 – 06/30/2023

New funding amounts have not been received															
	TOTAL	WIOA - AD	WIOA - DW	WIOA - Youth	Rapid Response	NEG - Opioid	TAA/TAT	SNAP	WTP	RESEA	VETS	WP	NCPEP	Back to Work	Corporate
Funding:															
Approved Preliminary Budget	12,648,676	1,917,132	1,898,122	1,586,116	138,877	301,332	52,008	286,575	2,269,748	641,796	272,479	768,491	1,666,000	700,000	150,000
NEW BUDGET															
Actual Allocations (plus anticipated)	5,968,749	1,008,942	800,833	919,265		-	-		1,946,145	397,398	250,000	646,166		-	-
Actual Allocations (Non Recurring) plus Anticipated	2,376,000				50,000			160,000					2,166,000		
Carryover (recurring \$)	3,545,641	753,291	1,054,512	421,760	127,513	314,231	50,311	103,098	316,813	148,036	24,089	231,987	-	-	-
Supplemental WIOA	-														
Incentives	-	-													
Ticket to Work/Tobacco Free	150,000														150,000
Other (new or carryover)	1,409,364													1,409,364	
TOTAL FUNDING	13,449,754	1,762,233	1,855,345	1,341,025	177,513	314,231	50,311	263,098	2,262,958	545,434	274,089	878,153	2,166,000	1,409,364	150,000
Budgeted Expenditures:	-													709,364	-
Payroll & Benefits - Business Services	747,590	166,280	171,570	68,421		17,219		35,628	216,463	72,009					
Payroll & Benefits - Program Services	1,699,513	227,573	305,774	76,197	19,029	30,645	4,840	28,535	534,068	128,158	80,762	136,899	7,483	113,940	5,610
One Stop Operator	20,999	2,945	2,678	861	517	447	71	925	6,371	1,973	2,101	2,001	109		
One Stop Allocated Costs	739,501	47,872	52,301	16,154	3,354	6,396	1,010	10,683	90,542	26,645	29,611	413,824	1,562	38,294	1,253
Capital Purchases	22,150											22,150			
Program Operations - Allocated	12,850	1,720	1,767	576		232	37	479	2,913	969	1,300	1,035	57	1,723	42
Business Services Allocated	31,000	4,703	3,459	1,375		714		1,477	16,286	2,986					
Board & One-Stop Pooled Operating Costs	3,273,604	451,093	537,549	163,584	22,900	55,653	5,958	77,727	866,643	232,740	113,774	575,909	9,211	153,957	6,905
DIRECT CUSTOMER TRAINING															
Eckerd Youth Alternatives Program	950,000			950,000											
Eckerd WTP pilot project continued	25,000								25,000						
Goodwill - Pilot project continued	200,000		200,000												
ITAs	790,000	200,000	500,000			30,000	35,000		25,000						
At Risk Programs	150,000	75,000	30,000	30,000					15,000						
Customized Training/IWT	180,000	100,000				80,000									
OJT	150,000	100,000												50,000	
Gulf Coast Jewish	2,132,000												2,132,000		
Internships or other projects in line with mission	0														
Direct Participant Costs - Support Svcs	235,900					8,000			227,900						
Summer Program	200,000								200,000						
Total Direct Customer Training Costs	5,012,900	475,000	730,000	980,000	0	118,000	35,000	0	492,900	0	0	0	2,132,000	50,000	0
Board Direct Costs															
Direct Payroll & Benefits	2,129,731	300,783	221,278	87,963	86,789	45,677		94,512	574,213	191,018	32,934		15,359	467,692	11,513
Direct Operating Costs - Total operating cost minus rent from WP	287,601	8,000	4,755	33,792	14,270	3,058		2,168	22,793	3,923	7,533	172,500	3,195	11,394	220
	0														
Total Board Direct Costs	2,417,332	308,783	226,033	121,755	101,059	48,735	0	96,680	597,006	194,941	40,467	172,500	18,554	479,086	11,733
Indirect Costs	1,199,738	160,651	161,573	53,790	24,473	21,634	3,417	36,697	306,379	90,471	100,254	96,640	5,283	134,516	3,960
Total Indirect Costs	1,199,738	160,651	161,573	53,790	24,473	21,634	3,417	36,697	306,379	90,471	100,254	96,640	5,283	134,516	3,960
Total Planned Expenditures	11,903,574	1,395,527	1,655,155	1,319,129	148,432	244,022	44,375	211,104	2,262,928	518,152	254,495	845,049	2,165,048	817,559	22,598

WIOA Performance

- WIOA establishes performance indicators and reporting requirements to assess the state's and local area's effectiveness in serving individuals participating in the workforce development system.
- Indicators displayed consist of:
 - 5 Adult Indicators
 - 5 Dislocated Worker Indicators
 - 5 Youth Indicators
 - 3 Wagner-Peyser Indicators

WIOA Performance Goals

LWDB 16 CareerSource Pasco Hernando WIOA Performance Measures	PY2022 Negotiated Performance Levels	PY2023 Negotiated Performance Levels
Adults:		
Employed 2nd Qtr. After Exit	92.5%	92.5%
Employed 4th Qtr. After Exit	89.0%	89.0%
Median Wage 2nd Quarter After Exit	\$9,600	\$9,600
Credential Attainment Rate	85.4%	85.4%
Measurable Skill Gains	63.2%	63.2%
Dislocated Workers:		
Employed 2nd Qtr. After Exit	86.0%	86.0%
Employed 4th Qtr. After Exit	83.1%	83.1%
Median Wage 2nd Quarter After Exit	\$9,099	\$9,099
Credential Attainment Rate	92.9%	92.9%
Measurable Skill Gains	56.0%	56.0%
Youth:		
Employed 2nd Qtr. After Exit	78.0%	78.0%
Employed 4th Qtr. After Exit	73.0%	73.0%
Median Wage 2nd Quarter After Exit	\$3,457	\$3,457
Credential Attainment Rate	91.9%	91.9%
Measurable Skill Gains	80.3%	80.3%
Wagner-Peyser:		
Employed 2nd Qtr. After Exit	58.5%	58.5%
Employed 4th Qtr. After Exit	58.5%	58.5%
Median Wage 2nd Quarter After Exit	\$5,889	\$5,889

YTD Summary: Program Year 2021/2022



9,776 Businesses Served (16% increase)

Total Services Provided: 31,967
Date Range: 7/1/21 – 6/30/22

5,334 New Job Postings (19% decrease)

Date Range: 7/1/21 – 6/30/22

\$75,802.68 CT & OJT (84% decrease)

32 Customers Trained
Date Range: 7/1/21 – 6/30/22



9,379 Job Seekers Served (43% decrease)

Total Services Provided: 59,220
Date Range: 7/1/21 – 6/30/22

1,675 Job Seekers Entered Employment (20% decrease)

191 Veterans found employment
Date Range: 7/1/21 – 6/30/22

\$16.44 Average Hourly Wage (10% increase)

Date Range: 7/1/21 – 6/30/22



13,979 Customers Served in Resource Room Appointments

Date Range: 7/1/21 – 6/30/22

92,260 Calls, Chats, and Virtual Contacts

Made by ESC, RR, and RESEA Staff
Date Range: 7/1/21 – 6/30/22

4,612 Virtual Courses Completed

By Job Seekers
Date Range: 7/1/21 – 6/30/22



4,378* Covid-19 Related Initial Claimants

Hernando County: 1,202
Pasco County: 3,176
Date Range: 7/1/21 – 6/25/22

93,318* Covid-19 Related Initial Claimants

Combined Hernando/Pasco
Date Range: 3/1/20 – 6/25/22

395 Cash Assistance Open Cases (Avg. Monthly Total)

Date Range: 7/1/21 – 6/30/22

655 SNAP Open Cases

(Avg. Monthly Total)
Date Range: 7/1/21 – 6/30/22



90 WIOA Youth Program Found Employment or Enrolled in Post-Secondary Education (16% decrease)

Date Range: 7/1/21 – 6/30/22

125 WIOA Youth Earned a Credential (44% decrease)

Date Range: 7/1/21 – 6/30/22

50 WIOA Youth Completed Internship Opportunities (26% decrease)

Date Range: 7/1/21 – 6/30/22



110 WIOA AD/DW Enrollments

48 Customers in Pipeline
Estimated ITA of \$279,500.00
Date Range: 7/1/21 – 6/30/22

86 WIOA AD/DW Gained Employment

74 Placements in Sector
Strategy Fields
Date Range: 7/1/21 – 6/30/22

Targeted Sectors: Construction, Finance, Healthcare, IT, Manufacturing, Retail Trade, Transportation & Warehousing

*This number may include individuals claiming Reemployment Assistance for reasons other than Covid-19 related closures.

The REACH Act

- Florida's 2021 Reimagining Education and Career Help Act (REACH Act)
- Created to enhance access, alignment and accountability across the state's workforce development system
- For up-to-date information and the implementation process, please visit the CareerSource Florida website at www.careersourceflorida.com

THANK YOU

For more information, please visit our website at:

www.careersourcepascohernando.com

