

Executive Committee

Monday, July 12, 2021 12:00 Noon – 1:30 p.m.

Zoom Meeting ID: Zoom Password: Zoom Call in:

898 5593 5391 033799

+1 646 876 9923

VIRTUAL MEETING

Due to Coronavirus, in the interest of keeping our board, staff, and public safe this meeting is being held via a Zoom video conference. Please do not attend in person.

PROTOCOL FOR TELEPHONE/ZOOM MEETING

CareerSource

- 1. Please state your name when making or seconding a motion. Such as "I move the item, and your name "Jane Doe." Please also identify yourself when asking a question.
- 2. Put your phone/microphone on mute when not speaking. Don't forget to take it off when you wish to speak. Telephone users must press *6 to mute or unmute yourself.
- 3. Votes in the affirmative should be "aye" and in opposition should be "no" (delays in responding sometimes make it difficult to determine the intent of the vote).
- 4. Please be in a quiet area free of background noise, so we may hear you clearly when you are speaking. When using Zoom, please make sure the background is appropriate or choose one of their virtual backgrounds.
- 5. If you are calling and must leave the call, please don't put your phone on hold. In some cases, we will get music or recorded messages and we will not be able to conduct business.
- 6. If you are using your phone for audio, please identify yourself on the screen and state the last 4 digits of the number you are calling from.
- 7. Please note the chat function has been disabled.

The Committee is reminded of the conflict of interest provisions. In declaring a conflict please refrain from voting or discussion and declare the following information: 1) Your name and position on the Board, 2) the nature of the conflict and 3) who will gain or lose as a result of the conflict. Please also fill out form 8B <u>prior</u> to the meeting.

MEETING AGENDA

IDENTIFICATION AND INTRODUCTION OF ANY UNIDENTIFIED CALLERS

APPROVAL OF MINUTES

Approval of the Minutes of the 6/14/21 meeting.

RECOMM Approval

ACTION Motion for Approval **EXHIBIT** Minutes of the Meeting

Pages 8 - 13

NEW BUSINESS

1. Renewal of Audit Agreement with Anthony Brunson P.A.

Consideration to renew the agreement between CSBD and Anthony Brunson, PA, at a cost of \$33,000 the same fee paid last year for the conduct of the Fiscal Year 20-21 audit. Staff was satisfied with their services last year. This will be the third of four renewals under their contract. As the Audit Committee meets directly prior to the meeting the recommendations will be presented at the meeting.

RECOMM Approval

ACTION Motion for Approval **EXHIBIT** Memo #01 – 21 (LS)

Page 14

2. Renewal of External Monitoring Contracts for PY 21-22

Consideration to renew the contracts with Taylor Hall Miller Parker, P.A. (THMP) and Cherry Bekaert, LLP (CB) for PY 21-22 program and fiscal year monitoring respectively. Audit Committee members have requested that a discussion be held to determine the number of monitoring visits for the next contract period because of the low number of findings. Staff is recommending we continue with 3 program and 3 fiscal monitoring visits. If the Committee agrees the cost of the renewal for 1) THMP for 3 visits at \$28,000 per visit would be \$84,000 and 2) CB for 3 visits at a cost of \$22,500 per visit for a total of \$67,500, both at the same cost as last year. As the Audit Committee meets directly prior to the meeting the recommendations will be presented at the Execuitve meeting.

RECOMM Discussion

ACTION Motion Dependent on Discussion

EXHIBITS Memo #02 – 21 (LS)

Summary of Program and Fiscal Monitoring Over the Past 3 Years

Pages 15 – 17

3. CareerSource Broward Marketing and Communications Plan for PY 21-22

Consideration to approve CSBD's marketing and communication plans for PY 21-22. Each year, CSBD implements targeted and strategic outreach to job seekers, employers, and community stakeholders, through the press and digital, print, and social media, in an effort to increase awareness of CSBD services. This year's strategies include enhanced community outreach and educational campaigns, targeted marketing to distressed communities and collaboration with core partners, such as industry associations, chambers of commerce, local municipalities and additional key stakeholder groups.

RECOMM Approval

ACTION Motion for Approval

EXHIBIT CSBD Marketing and Communications Strategic Plan

Pages 18 - 31

4. One-Stop Center Hours of Operation and Holiday Schedule

The Master Agreement between CSBD and the Florida Department of Economic Opportunity requires the governing boards' annual approval of the 1) one-stop center hours of operation and 2) the CSBD holiday schedule. There are no changes to our hours of operation or our holidays.

RECOMM Approval

ACTION Motion for Approval **EXHIBIT** Memo #01 – 21 (EXEC)

Page 32

REPORTS

1. Hospitality Task Force Survey Results

CareerSource Broward (CSBD) distributed a survey to hospitality workers registered in Employ Florida regarding their intentions to return to their jobs. The number of responses was not statistically sufficient to extrapolate reliable conclusions. However, we are sharing anecdotal information which may help employers to strategize in encouraging employees to come back to work. Our anecdotal information is aligned with a larger FAU study.

ACTION None

EXHIBIT Memo #21 – 20 (CBR)

Pages 33 - 34

2. General Fund Balance

On 12/31/20 the General Fund balance was \$739,486 which included the set asides for contingencies and depreciation. Since then, we have realized revenues of \$212,078, including depreciation of \$111,511 and expenditures of \$124,253 resulting in a balance of \$827,311 as of 5/31/21. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #10 – 20 (FS)

Pages 35 – 38

3. Budget vs. Expenditure Report

The Budget vs. Expenditure Report is divided into 2 charts because some of the funding streams are awarded on July 1st in accordance with the WIOA program year and our other funding streams are awarded on October 1st in accordance with the federal fiscal year. The report identifies some under-expenditures in WIOA largely due to participants staying home during the pandemic. We have budgeted to address the carry forward into the new program year. All other funding streams are on target. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #11 - 20 (FS)

Pages 39 - 40

4. Cherry Bekaert, LLP Fiscal Monitoring Report #2 PY 20-21 Issued 4/21

Cherry Bekaert conducted fiscal monitoring for the period 10/1/20 through 2/28/21. Cherry Bekaert reviewed a total of 936 elements during the review period. There were no findings and 1 observation. Based upon the total elements reviewed, this was a 0% error rate. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBITS Memo #03 – 21 (QA) Chart of Findings

Pages 41 – 43

5. Taylor Hall Miller Parker, P.A. Program Monitoring Report #1 – PY 20-21 – Issued 2/21

Taylor Hall Miller Parker conducted program monitoring for the period 7/30/20 through 11/19/20. They reviewed a total of 179 files consisting of 7,633 elements. There were 4 findings and 3 observations. This equates to an error rate of (.05%) less than 1%. All findings and observations were corrected except where cases were closed and no further action could be taken. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #01 - 21 (QA)

Pages 44 - 49

6. Taylor Hall Miller Parker, P.A. Program Monitoring Report #2 - PY 20-21 - Issued 4/21

THMP conducted program monitoring for the period 11/19/20 through 02/26/21. They reviewed a total of 181 files consisting of 7,089 elements. There were 20 findings and 9 observations. This equates to an error rate of (.28%) less than 1%. All findings and observations were corrected except where cases were closed and no further action could be taken. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #02 – 21 (QA)

Pages 50 - 56

7. Department of Economic Opportunity Program Monitoring Report Issued 3/31/21

The Florida Department of Economic Opportunity issued their Program Monitoring Report for the period 4/19 through 3/20, on 3/31/21. They reviewed a total of 218 files consisting of 5,852 elements. There were 9 findings and 7 non-compliance issues. The findings equate to an error rate of (.27%) less than 1%. All findings and non-compliance issues were corrected except where cases were closed and the observations were addressed. Our Corrective Action Plan was accepted on 4/30/21. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #04 - 21 (QA)

Pages 57 - 70

8. <u>Department of Economic Opportunity Fiscal Monitoring Report Issued 3/31/21</u>

The Florida Department of Economic Opportunity issued their 2019-2020 Financial Compliance Monitoring Report for the period 4/19 through 3/20, on 3/31/21. There were zero (0) findings, non-compliance issues or observations. There was 1 technical assistance item. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

ACTION None

EXHIBIT Memo #05 - 21 (QA)

Page 71

9. Report on Technology and Construction Industry Employer Forums

CSBD held two (2) virtual employer forums 1) the technology industry on 5/19 and 2) the construction industry on 5/26 to better understand the impacts of the COVID-19 pandemic. Each forum had a guest speaker, followed by a panel discussion and open dialogue, allowing for those in attendance to participate and share their experiences and insights. Based on the information shared at the forums, we developed specific strategies and action steps to assist employers in each of these targeted industries.

ACTION None

EXHIBIT Memo #19 – 20 (CBR)

Pages 72 - 76

10. Board Member Recognition

Presentation of plaque for Dr. Steven Tinsley who has resigned from the board.

ACTION None EXHIBIT None

MATTERS FROM THE EXECUTIVE COMMITTEE

MATTERS FROM THE FLOOR

MATTERS FROM THE PRESIDENT/CEO

ADJOURNMENT

THE NEXT EXECUTIVE COMMITTEE MEETING WILL BE HELD ON SEPTEMBER 13, 2021.



Broward Workforce Development Board Executive Committee

Monday, June 14, 2021 12:00 Noon – 1:30 p.m.

989856

Zoom Meeting ID: 838 6361 7220 Zoom Call in: +1 646 876 9923

Zoom Password:

MEETING MINUTES

The Committee is reminded of the conflict of interest provisions. In declaring a conflict please refrain from voting or discussion and declare the following information: 1) Your name and position on the Board, 2) the nature of the conflict and 3) who will gain or lose as a result of the conflict. Please also fill out form 8B prior to the meeting.

MEETING AGENDA

Attendees via zoom/phone: Gary Arenson, Zac Cassidy, Dr. Lisa Knowles, Rick Shawbell, Marjorie Walters, and Janet Wincko

Guests via zoom/phone: Samuel Christopher, Charlene Pou, Jamie Cooper, and Ruben Aguilera from New Horizons Computer Learning Center

Staff via zoom/phone: Carol Hylton, Ron Moffett, Rochelle Daniels, Mark Klincewicz, and Amy Winer

APPROVAL OF MINUTES

Approval of the Minutes of the 5/10/21 meeting.

On a motion made by Rick Shawbell and seconded by Gary Arenson, the Executive Committee unanimously approved the minutes of the 5/10/21 Executive Committee meeting.

NEW BUSINESS

1. Region 22 Targeted Occupations List (TOL) for Program Year 21-22

Considered approval of the TOL for PY 21-22. We sent the preliminary TOL for PY 21-22 provided by the state to local education and business stakeholders to get input and gather

additional relevant labor market data. We also held a publicly noticed meeting on 5/25 to review the occupational changes to Region 22's TOL and gather additional information. Based upon our review and community input, CSBD recommends 1) retaining 13 occupations proposed by the State for removal and 2) adding 20 new occupations. Approved at the 6/8 One Stop Services Committee meeting.

Carol Hylton stated that we have received the preliminary TOL for the PY 21-22. We have researched the list and compared it to the Board-approved criteria. This is to retain the 13 occupational titles that the State proposed for removal and add 20 new occupations that the state proposed we add. We had over 50 people attend the TOL meeting. These individuals were eligible training providers, community partners, business leaders, and industry intermediaries.

On a motion made by Gary Arenson and seconded by Zac Cassidy, the Executive Committee unanimously approved Region 22 TOL for PY 21-22.

2. Accept Reemployment Services and Eligibility Assessment Program Funds

Considered the acceptance of \$220,314 in Reemployment Services and Eligibility Assessment (RESEA) funds. The funds will be used to provide mandatory career center services for the expected increase in RESEA customers. With the additional funding, the total amount received by CSBD for RESEA is \$838,303. Approved at the 6/8 One Stop Services Committee meeting.

Ron Moffett, Executive Vice President, advised that RESEA customers are mandated to participate in the services of the program to continue receiving reemployment assistance. The funds will be used to support the staff, overhead, rent, office supplies, and equipment needed to increase operational capability. These funds are available to us until 9/30.

On a motion made by Marjorie Walters and seconded by Dr. Lisa Knowles, the Executive Committee unanimously approved the acceptance of the RESEA funds.

3. Accept City of Dania Beach Summer Youth Funds

Considered the acceptance of \$22,114 from the City of Dania Beach to serve 7 economically disadvantaged youth ages 16-18 years old in the PY 20-21 Summer Youth Employment Program. Youth will receive three days of employability skills training and an eight-week meaningful summer work experience. Approved at the 6/8 One Stop Services Committee meeting.

Carol Hylton advised that this is the first year the City of Dania Beach has partnered with us for the summer youth program. We are delighted to have them. The program will serve seven economically disadvantaged youth who reside within the boundaries of the City.

Gary Arenson inquired how they came up with the amount of \$22,114. Ms. Hylton responded that normally a city or municipality asks us to provide them a per-youth budget.

We include the cost for the monitors, food, and wages. Then they do their calculations based upon the number of youth they can serve with the amount of money they have available to award us.

On a motion made by Gary Arenson and seconded by Dr. Lisa Knowles, the Executive Committee unanimously approved the acceptance of City of Dania Beach Summer Youth Funds.

4. Accept Children's Services Council Funds for Summer Youth Program

Considered the acceptance of \$2,772,408 from the Children's Services Council (CSC) to serve 817 economically disadvantaged youth ages 16-18 years old in the PY 21-22 Summer Youth Employment Program. These funds will allow us to maintain the same number of youth we served this year and offset the anticipated increase in the minimum wage. Youth will receive three days of employability skills training and an eight-week meaningful summer work experience. Approved at the 6/8 One Stop Services Committee meeting.

Ms. Hylton shared that CSC increased our funding to serve 200 additional youth. We are delighted, as this will help continue the growth of our summer youth program for PY 21 - 22.

On a motion made by Dr. Lisa Knowles and seconded by Zac Cassidy, the Executive Committee unanimously approved the acceptance of an additional award of \$2,772,408 from the Children's Services Council for the SYEP.

REPORTS

1. Apprenticeship Awareness Campaign

At the request of the Board, CareerSource Broward 1) created three (3) apprenticeship videos and 2) a digital and social media advertising campaign to increase awareness, targeting employers and those interested in exploring apprenticeship opportunities. Board members Rick Shawbell and Zac Cassidy reviewed a draft of the videos and provided feedback which was incorporated. Apprenticeships are a proven training method benefitting both apprentices and businesses.

Ron Moffett thanked Rick Shawbell and Zac Cassidy for providing feedback and their assistance on the apprenticeship videos.

Mr. Moffett stated that we produced these videos and developed the strategies listed in the memo to promote the videos and earn while you learn opportunities. We also sent the

videos to the members of the One Stop Services Committee and all five of our Youth Providers so they can share with their networks and youth enrolled in our programs.

Ms. Hylton advised that we sent the videos to the Broward County Office of Economic and Small Business Development and the Chambers. Ms. Hylton noted that the videos were sent to Lynn Goldman at Broward County Public Schools to share with the students who are undecided on their plans after high school. Our school board liaison, Christy Bradford will also share the videos with Talent Forge Work-based Learning Consortium.

Gary Arenson said that the videos are wonderful and inquired if the videos were produced internally. Ms. Hylton responded that the videos were produced with Moore Communications Group as part of the CareerSource Florida Marketing Co-op.

2. City of Dania Beach Referrals Partnership

Dania Beach Commissioner Lori Lewellen approached CSBD to see how we could work together to increase awareness and provide additional opportunities for Dania Beach residents to pursue marine-related careers. The city plans to utilize \$75,000 in general fund revenues to provide supportive services to ten (10) Dania Beach residents enrolled in marine-related training programs through CSBD. Each individual could receive up to \$7,500 in support to assist with items such as transportation (to include rideshare or car purchase) childcare, and/or elderly care. We have 1) created a referral form which was approved by Dania Beach 2) trained staff on this new initiative and 3) started referring customers for additional support.

Ms. Hylton advised that we are in partnership with the City of Dania Beach. The City of Dania Beach wants to expand marine-related careers in their area. The city plans to utilize \$75,000 of its general fund to provide supportive services to 10 Dania Beach residents to pursue marine-related careers. Additionally, individuals could receive up to \$7,500 in support to assist with items like ride-share, car purchases, childcare, and/or elderly care. CSBD has developed a referral form that we are using to refer the Dania Beach residents to the city for supportive services. This collaboration will benefit us by expanding our training programs in the city while increasing awareness of CSBD among residents.

3. Report on Marine and Health Care Industry Employer Forums

CSBD held two (2) virtual employer forums 1) the marine industry on 3/24 and 2) the healthcare industry on 4/27 to better understand the impacts of the COVID-19 pandemic. Each forum had a guest speaker followed by a panel discussion and open dialogue allowing for those in attendance to participate and share their experiences and insights. Based on the information shared at the forum, we developed specific strategies and action steps to assist employers in each of these targeted industries.

Ron Moffett advised that this is all about partnerships with two very important key industries for our local community, Marine and Healthcare. We held these forums to fulfill our roles as conveners, hear about their issues, share information and to see if we can develop some workforce solutions to address labor market issues. Both of the forums were well attended by industry representatives, employers, and staff.

During the discussion with our industry representatives, they provided insight on the various obstacles the pandemic created. Mr. Moffett explained that in the Marine Industry, the cruise lines were negatively impacted but recreational boating and yachting saw an increase in boat sales.

We are also in the process of scheduling individual meetings with employers to provide support with OJT's, paid internships, and Marine technicians in our registered apprenticeship program.

As it related to the Healthcare industry we are actively engaging with several employers to identify the issues they are seeing and to bring work-based training programs to them. The Healthcare industry needs nurses. One of the solutions for the industry is to go to our recent graduates from our Individual Training Account nursing programs and to consider work-based training and upskilling programs.

Carol Hylton advised that we have ten Marine and five Healthcare employers that would like to have subsequent conversations with us to talk about our work-based programs.

4. Janitorial Services

Our current janitorial services contract for the Administrative Office expires on 8/4/21. In accordance with our procurement policy, we obtained quotes from five vendors including our current provider. Our current service provider, AK Building Services, was the lowest bidder. Over the previous two years, we have been very pleased with their service. The new contract will begin on 8/5/21 at a cost of \$44,352, a slight increase of \$2,112 over the previous two years. Because it is a single purchase of over \$10,000 it is being reported to the governing boards.

Ms. Hylton advised that this is a single purchase over \$10,000 so it is being reported to the board. AK Building Services was the lowest bidder and the cost is \$44,352. This is a slight increase over last year.

MATTERS FROM THE EXECUTIVE COMMITTEE

None

MATTERS FROM THE FLOOR

None

MATTERS FROM THE PRESIDENT/CEO

Ms. Hylton advised that today is the 1st day of our Summer Youth Program employability skills training. The training is being held in person and on Zoom. We have approximately 900 kids enrolled this summer.

Ms. Hylton stated that she has an upcoming meeting with President Gregory Haile and Ramola Motwani, Chairwoman of Merrimac Ventures to discuss ways we can further partner to develop future leaders in hospitality and tourism in South Florida.

We are seeing an uptick of customers in our centers as the work waivers have ended. We are prepared for the increase of customers.

Mr. Arenson inquired when the board would receive the Hospitality survey results. Ms. Hylton responded that the staff is compiling the results of the survey and it will probably be presented at the July Board meeting.

Lastly, Ms. Hylton advised that we completed tabulating the results from the Board survey and board members would like to begin in-person Board meetings starting in September. They also indicated the desire to have the option of Zoom and/or teleconference. We will update the board agenda with the survey results.

ADJOURNMENT 12:34 p.m.

THE NEXT EXECUTIVE COMMITTEE MEETING WILL BE HELD ON JULY 12, 2021.



Memorandum #01-21 (LS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Renewal of the Agreement with Anthony Brunson, PA for Audit Services

Date: July 8, 2020

SUMMARY

Consideration of renewal of the Agreement between CareerSource Broward (CSBD) and Anthony Brunson, PA, at a fee of \$33,000 for the conduct of the Fiscal Year 20-21 audit. Staff was satisfied with their services last year. This will be the third of four renewals under their contract. As the Audit Committee meets directly prior to the meeting the recommendations will be presented at the meeting.

BACKGROUND

Our current agreement with Anthony Brunson PA, the firm we engaged to perform our annual audit expires in September.

DISCUSSION

CSBD staff and its governing boards were satisfied with the conduct of the audit last year by Anthony Brunson, PA. Mr. Brunson agreed to complete this year's Audit for \$33,000, the same rate as last year. This will be the third of four renewals under their contract.

RECOMMENDATION

Consideration to renew the agreement for audit services with Anthony Brunson, PA for the Fiscal Year 20-21 audit at a cost of \$33,000.

Administrative Office 2890 West Cypress Creek Road Ft. Lauderdale, FL 33309



Memorandum #02 – 21 (LS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Approval of External Monitoring Contracts for PY 21 - 22

Date: July 6, 2021

SUMMARY

Consideration to renew the contracts with Taylor Hall Miller Parker, P.A. (THMP) and Cherry Bekaert, LLP (CB) for PY 21-22 program and fiscal year monitoring respectively. Audit Committee members have requested that a discussion be held to determine the number of monitoring visits for the next contract period because of the low number of findings. Staff is recommending we continue with 3 program and 3 fiscal monitoring visits. If the Committee agrees the cost of the renewal for 1) THMP for 3 visits at \$28,000 per visit would be \$84,000 and 2) CB for 3 visits at a cost of \$22,500 per visit for a total of \$67,500, both at the same cost as last year.

BACKGROUND

CSBD contracts for external monitoring to execute the oversight responsibilities of the governing boards. The cost of the services required CSBD solicit quotes in accordance with its procurement policy. We received 2 quotes and it was decided to split the monitoring services into two (2) separate contracts one for program and the other for fiscal monitoring between the two responders THMP and CB.

CSBD entered into a contract for program monitoring with 1) THMP at a cost of \$28,000 per visit for 3 visits for a total of \$84,000 per year and for fiscal monitoring with 2) CB at a cost of \$22,500, per visit for 3 for a total of \$67,500 per year. The contracts were written for one year, renewable for 4 one year periods. October 1, 2021 – September 30, 2022 is the last renewal period under the original procurement for these services.

DISCUSSION

THMP and CB have been conducting program and fiscal monitoring pursuant to their contract. The reports are timely and in a format approved by staff and the Audit Committee. Over the past few years the reports indicate a low level of findings. DEO State reports have also had a low level of findings and other non-compliance issues. A chart is attached summarizing the findings over the past few years for the convenience of the Committee.

The Committee has indicated a desire to discuss whether to continue monitoring at the current level of 3 program and 3 fiscal monitoring visits per year. To assist the committee, staff did some research on cause and effect. We determined that number and frequency of the monitoring visits is a direct contributor to fewer findings based on the "Hawthorne" effect.

The "Hawthorne" effect refers to how an individuals' behavior is impacted when they know they are being observed. This leads to the conclusion that because staff knows their files will be monitored they respond by being more careful in their data entry. Reducing the number of monitoring visits may be interpreted as "taking our foot of the gas" creating an unintended laxness on the part of staff. Staff takes great pride in the clean monitoring reports.

At this time it is recommended that we continue with the same number of visits as in previous years. This would be the renewal of the contract with 1) THMP for 3 visits at a cost of \$28,000 per visit for a total of \$84,000, the same cost as last year and 2) CB for 3 visits at a cost of \$22,500 per visit for a total of \$67,500, the same cost as last year.

RECOMMENDATION

Discussion

Attachment to Memo #02 - 21 (LS)

Program and Fiscal Monitoring Over the Past 3 Years

PROGRAM MONITORING

Program Year	Monitor	# of Visits	# Files Reviewed	# of Elements	# Findings	Error Rate
18-19	THMP	3	533	17,731	13	.07%
19-20	THMP	3	528	22,224	30	.14%
20-21	THMP	2	360	14722	24	.16%

DEO PROGRAM MONITORING

Program Year	Monitor	# of Visits	# Files Reviewed	# of Elements	# Findings /Non Compliance	Error Rate
18 - 19	DEO	1	241	9,653	7/7	.15%
19 - 20	DEO	2	218	5852	9/7	.27%
20 21	DEO	No Report	Issued Yet			

FISCAL MONITORING

Program Year	Monitor	# of Visits	# Files Reviewed	# of Elements	# Findings	Error Rate
18-19	СВ	3			0	
19-20	СВ	3			0	
20-21	СВ	2			0	

Note: THMP and CB will conduct another visit for PY 20-21.

DEO FISCAL MONITORING

Program Year	Monitor	# of Visits	# Files Reviewed	# of Elements	# Findings /Non Compliance	Error Rate	
18-19	DEO	1			0		
19 - 20	DEO	1			0		

As can be seen from the above the THMP and CB monitorings have contributed to very few findings in the DEO Reports.



Marketing & Communications Strategic Plan

Program Year 21/22

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Executive Summary

CareerSource Broward (CSBD), the administrative entity of the Broward Workforce Development Board, is committed to adapting its services to changing economic climates, identifying and capitalizing on business trends and perhaps, most importantly, serving as a successful business model for regional partners and the community as a whole.

The marketing & communications strategic plan for PY 21/22 focuses on specific efforts that support 1) recovery 2) restructuring and 3) resilience when it comes to Broward County's labor force and economy.

Strategies include enhanced community outreach and educational campaigns, targeted marketing to distressed communities and collaboration with core partners such as industry associations, chambers of commerce, local municipalities and additional key stakeholder groups.

Messaging centered on available workforce services for employers and job seekers will be delivered through established media relations, print marketing, social media and the agency's website. These effective forms of communication give CSBD the opportunity to increase its brand awareness throughout the region, while also ultimately achieving the vision and mission of the organization and improving performance.

Vision

To be the premier workforce agency facilitating better jobs and providing quality workers that enhances the quality of life and builds a sustainable economy for Broward County.

Mission

To provide innovative solutions through the professional delivery of quality services, which consistently and effectively meet workforce needs.

Organizational Goals

The organizational goals identified for CSBD by our governing boards are:

- 1. Improve the sustainability of the workforce system through increased funding, efficiency, technology, and relevancy.
- 2. Maintain our role as workforce development leaders through advocacy by the board, collaboration, and providing information and intelligence to stakeholders with feedback from the community.
- 3. Encourage employers by engaging and identifying their needs, and educating and connecting them to the workforce system to produce innovative workforce solutions.
- 4. Encourage job seekers to choose CSBD for comprehensive employment, education and training services, and to connect them to the workforce system using the state's job bank.

- 5. To align Broward County community services (social services and education) to maximize employment and work opportunities for targeted populations (veterans, youth, individuals with disabilities, older workers, and ex-offenders).
- 6. Develop and utilize a legislative agenda to improve employment services and opportunities in Florida.
- 7. To anticipate political, environmental, and economic changes in the near and long-term future and prepare for those changes.

Communications Strategy

- 1. Be responsive to changing communication trends.
- 2. Ensure all marketing and communication material is in compliance with the guidance defined in the CSBD Brand Standards Manual.
- 3. Expand our use of the media through press releases, pitching human interest stories, and public service announcements.
- 4. Responsibly incorporate social media, video, and digital outreach.
- 5. As the Broward County's workforce development agency, be consistent and intentional in disseminating information and content relevant to workforce-related topics to the local community.
- 6. Maximize the website as CSBD's electronic storefront, incorporating testimonials to tell the story of what the organization stands for and offers its key stakeholders and general public.

Target Audiences

- CEOs and Business Owners
- 2. Human Resources Professionals
- 3. Job Seekers
- 4. Broward Workforce Development Board Members
- 5. CSBD Employees
- 6. Elected officials and the legislative delegation
- 7. Trade and Industry Representatives
- 8. Media

- 9. Chambers of Commerce
- 10. WIOA Core Partners
- 11. Municipalities
- 12. Veterans Groups
- 13. Community and education partners

Key Messages

The key messages we want CSBD's target audiences to hear as a result of the activities in this plan are:

- 1. CSBD is Broward County's premiere workforce agency and has a diverse pipeline of talent in its job seeker pool including veterans, white-collar, blue-collar, etc.
- 2. Ongoing programs and resources are available for Broward County job seekers and employers to assist with pandemic-related recovery efforts.
- 3. CSBD's portfolio of workforce solutions are designed to support employers with their recruiting and work-based training needs, such as on-the-job training and registered apprenticeships.
- 4. Success stories experienced between CSBD and Employers/Job Seekers/Community Partners

Communications Tactics

- Media Relations: Continuous engagement with local media outlets is absolutely crucial for helping to brand and promote any organization. News releases and media alerts will be distributed through CSBD's communications office, with the senior communications manager taking the lead of drafting, writing and distributing releases for events. This tactic also allows the organization to pitch newsworthy stories to members of the media and general public – giving more positive exposure related to the service and resources CSBD provides.
- 2. <u>Digital / Online Marketing Initiatives</u>: Digital marketing is a cost-effective method for reaching a wide audience. An email or social media campaign, for example, can transmit a marketing message to consumers for the smallest fraction of the cost of a TV ad or print campaign, and potentially reach a wider audience. Through the use of electronic eBlasts, Google Ads, social media ads, digital invitations, video and more, CSBD will be able to position itself for success, as it relates to spreading the word.

- 3. <u>Social Media</u>: Social media continues to be a major focus and growing component of the Internet, with more users signing up for social media accounts every day. CSBD can use its existing social media outlets (Facebook, Twitter, Instagram, YouTube, LinkedIn) as an opportunity to reach its stakeholders and target audience to promote news, events, programs and other resources, as part of a larger communications effort.
- 4. <u>Website</u>: In today's ever-changing business climate, it is imperative that organizations have a user-friendly website in order to distribute, post and make public information that will benefit its stakeholders and target audience. CSBD's website (<u>www.careersourcebroward.com</u>) will be the main source of general information related to the organizations' programs, services and initiatives. The website will be relevant and SEO-friendly, making CSBD easier to find in online search results.
- 5. <u>Print Marketing Materials</u>: Along with a solid online presence, print design will be essential to CSBD's success. Print is still an effective, widely used form of marketing and will continue to be so for years to come. CSBD will continue to create visually pleasing marketing materials (flyers, brochures, invitations, infographics, etc.) that will help tell the value of the organization to stakeholders and the community.
- 6. <u>Photography / Video</u>: Having good-quality and high-resolution photos gives CSBD the tool it needs to showcase events, staff and other important subjects related to ongoing services in the community. We plan to use more photography and video testimonials in our digital marketing initiatives.

Key Focus Areas and Objectives

- **A. Media Relations**: Continue to strengthen relationships with the media.
 - Proactive and interactive media relations initiatives that result in increased exposure of CSBD programs and services.
 - Maintain timely response to media inquiries.
- **B. Marketing Campaigns:** Execute timely marketing campaigns through print, radio, digital and social media platforms.
 - Create and implement marketing campaigns that reach CSBD's targeted audience promoting CSBD's various programs and/or services. In addition to marketing our standard services, campaigns will be developed:
 - o targeting customers in the distressed communities
 - to employers about the benefits of serving as a worksite for the Summer Youth Employment Program
 - o to help local municipalities recognize the opportunity to partner with us to assist their unemployed and underemployed residents with employment and occupational training using funds from the American Rescue Plan.

- C. Social Media: Intentional and consistent use of social media platforms to expand awareness.
 - Use Twitter, Facebook, Instagram, and LinkedIn for distributing relevant and timely information.
 - Continue to increase the number of Twitter, LinkedIn and Instagram followers and Facebook "Likes."
 - Use YouTube for video distribution of information about our programs and services.
- **D. Staff Engagement:** Keep all CSBD staff informed and engaged in organizational priorities.
 - Disseminating and sharing information, stories and material with CSBD employees.
- **E. Partnerships:** Leveraging community and private sector partnerships to expand CSBD exposure.
 - Increase awareness through marketing with our partners in public education, local chambers of commerce, industry associations and other community-based organizations.
 - Partner with Broward County to develop videos about virtual recruitment and hiring tips to employers and job seekers.
- **F. Professional Development:** Identify educational and training opportunities to keep pace with the rapidly changing communications industry.
 - Seek out additional learning opportunities for marketing and communications staff in order to create and promote effective and sustaining integrated campaigns and public information.

A. Media Relations: Continue to strengthen relationships with the media

Ok	Objective 1: A proactive and interactive media relations program that results in increased exposure of CSBD programs and services					
	Action Item	Timeframe				
1	Consistent and intentional dissemination of press releases, media alerts, public service announcements and human interest stories related to CSBD.	Ongoing				
2	Maintain an online press room on the CSBD website that includes a media kit, links to press releases, fact sheets, and positive story ideas.	Ongoing				
3	Cultivate positive relationships with media contacts that cover areas of workforce development, while also making targeted follow-up calls to media on news releases of particular interest.	Ongoing				
4	Expand awareness outreach to include national and state organizations, professional associations, and business groups.	Ongoing				
Objective 2: Maintain timely response to media inquiries						
	Action Item	Timeframe				
1	Make a presentation in the career center meetings about the agency's procedures for handling media requests.	August 2021 and March 2022				

B. Marketing Campaigns: Execute timely marketing campaigns through print, radio, electronic and social media platforms

Objective 1: Create and implement marketing campaigns that reach CSBD's targeted audience promoting CSBD's various programs and/or services.

	Action Item	Timeframe
1	Develop an internal marketing and communications calendar for Program Year 2021/2022. Include marketing campaigns to a) customers in the distressed communities, b) target employers for SYEP, c) local municipalities assisting them with helping their barriered residents with funds from the American Rescue Plan Act.	July 2021
2	Deploy marketing campaigns in Spanish and Haitian-Creole when applicable to the targeted audience.	Ongoing

C. Social Media: Intentional and consistent use of social media platforms to expand awareness

C. Soc	. Social Media: Intentional and consistent use of social media platforms to expand awareness						
Ob	Objective 1: Use Twitter, Facebook, Instagram, and LinkedIn for distribution of information about our programs and services						
	Action Item Timeframe						
1	Use CSBD's Twitter, Facebook, Instagram, and LinkedIn platforms during marketing campaigns and dissemination of CSBD announcements and updates.	Ongoing					
Ob	jective 2: Increase the number of Twitter "followers" & "likes", Faceb	ook "followers" &					
	"likes" and Instagram "followers".						
	Action Item	Timeframe					
1	Increase the number of Twitter followers & likes by 15 percent. Currently, CSBD has 1,992 "followers."	June 2022					
2	Increase the number of Facebook followers & likes by 15 percent. Currently CSBD has 4,522 "followers" & 4,083 "likes."						
3	Increase the number of Instagram followers by 15 percent. Currently CSBD has 1,539 "followers."						
Obje	Objective 3: Use YouTube for distribution of information about our programs and services via quarterly podcasts.						
	Action Item	Timeframe					
1	Record and post at least three (3) podcasts and/or videos to the CSBD YouTube channel.	June 2022					
2	Market CSBD's YouTube channel to the public through eBlast and information on the centers' digital monitors.	Ongoing					

D. Staff Engagement: Keep all CSBD staff informed and engaged in organizational priorities.

Obj	Objective 1: Disseminating and sharing information, stories and material with CSBD employees.					
	Action Item	Timeframe				
1	Continue to gather, store and disseminate relevant news clippings related to CSBD's vision and mission.	Ongoing				
2	Continue to include CSBD staff to the distribution list of all press releases, media alerts, general communications and relevant information.	Ongoing				
3	Encourage CSBD staff to follow the organization's current social media platforms (Facebook, Twitter, Instagram, LinkedIn, and YouTube).	July 2021 January 2022				

E. Partnerships: Leveraging community and private sector partnerships to expand CSBD exposure.

	Objective 1: Increase awareness through marketing with our partners in public education, local chambers of commerce, industry associations and other community-based organizations.						
	Action Item	Timeframe					
1	Continue to partner with Broward libraries to provide information about CSBD services to customers of the libraries.	Ongoing					
2	Continue to provide workforce-related content and editorials for industry association newsletters (SFHHA, SFMA, GFLA, NAWIC, Chambers). Ongoing						
3	Increase CSBD's presence on Chamber websites by 50 percent. October 2021						
4	Explore regional opportunities for joint media outreach with CareerSource Palm Beach County and CareerSource South Florida.	Ongoing					

F. Professional Development: Identify educational and training opportunities to keep pace with the rapidly changing communications industry.

Objective 1: Seek out additional learning opportunities for marketing and communications staff in order to create and promote effective and sustaining integrated campaigns and public information.					
	Action Item	Timeframe			
1	Research professional marketing, public relations, advertising and graphic design associations that provide training and education to expand the skillsets and understanding among current staff.	Ongoing			
2	Incorporate training and professional development into staff goals in the performance evaluation.	Varies depending on the applicable staff member's evaluation period			



Marketing & Communications Strategic Plan Exhibit

Below are examples of previous marketing and communications efforts completed in PY 20/21.

A. Media Relations

CareerSource Broward (CSBD) has a well-established, professional relationship with local, state and national media outlets. These connections will continue to be strengthened in order to pitch newsworthy stories that are then viewed by Broward County job seekers, employers and the general public. Examples of completed media relations include:

- CSBD President/CEO Carol Hylton featured on MSNBC, where she discussed ongoing recovery efforts to assist Broward County job seekers and employers.
- Numerous media interviews conducted by CSBD's senior communication manager, Javon Lloyd, with media outlets such as WPLG Local10 News, WSVN, NBC 6 South Florida, WLRN Public Radio, WIOD News Radio 610AM and the South Florida Business Journal.
- Summer Youth Employment Program being aired on WSFL-South Florida's The Rebound television show; news story featured a former youth who participated in the program, as well as an employer who spoke about the benefits of serving as a worksite during the summer.
- Successful placements of op-eds in news print and online editions of the Sun-Sentinel and El Sentinel newspaper.
- Below are examples of successful story placements with media outlets.





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B. Marketing Campaigns

Through the use of Google Ads, social media ads, print ads, radio PSAs, mass emailing and more, CSBD increased awareness of our services and available workforce programs. Examples of marketing efforts taken include:

- Targeted digital marketing campaign through the Sun-Sentinel promoting Employ Florida and job seeker resources to workers whose employment was impacted due to the pandemic; ads were featured on well-known websites, including CNN, Yahoo!, ESPN and The New York Times.
- Digital monitor ads in several Florida Department of Motor Vehicles locations throughout Broward County marketing CSBD's job placement services and scholarship program.
- Over 2 million email blasts sent to employers, job seekers, community partners, public information officers and religious groups highlighting upcoming job fairs, recruitment events and on-the-job training opportunities.
- Print and digital ad placements in minority-owned and culturally diverse publications, including the Le Floridien, El Sentinel and Westside Gazette, resulting in increased traffic to CSBD's website.
- Below are examples of successful marketing campaigns.



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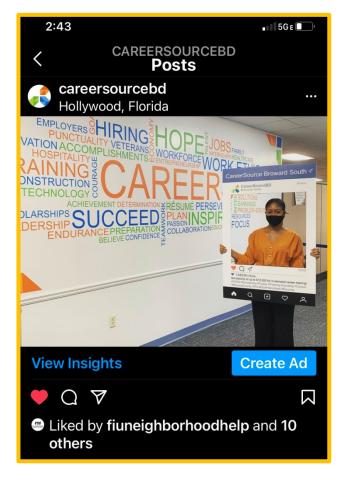
C. Social Media

Social media is an important component to CSBD's overall outreach strategy. Key stakeholders and the general public are able to receive real-time information regarding the latest agency news, workforce initiatives, upcoming events and available resources. Examples of completed social media outreach include:

- More than 11,800 followers on CSBD's social media platforms, which include Facebook, Instagram, LinkedIn, Twitter and YouTube.
- A general awareness social media campaign through the state's co-op program promoting the benefits of participating in apprenticeships; results of the campaign included 758K video ad views and more than 4,000 individuals visiting the dedicated apprenticeship landing page.
- Local community partners and municipalities such as City of Hollywood, Broward College, Broward County Office of Economic and Small Business Development and various chambers of commerce sharing CSBD's social media posts highlighting customer success stories, employer testimonials and career training programs.
- Below are examples of social media posts by CSBD.







D. Staff Engagement

Staff routinely receives press releases, media alerts, general communications and relevant information that are disseminated through the communications department. This allows continuity of messaging, especially with frontline staff who works directly with customers and employers at the career centers. Examples of staff engagement include:

- Gathering, storing and sharing daily news clippings within the agency related to CSBD's vision and mission, as well as workforce development.
- Establishing the CBSD Twitter Ambassadors Program comprised of outreach staff who share and repost information about the agency through Twitter.
- Presentations made by the senior communications manager at the career centers covering how to handle media requests and community outreach procedures.



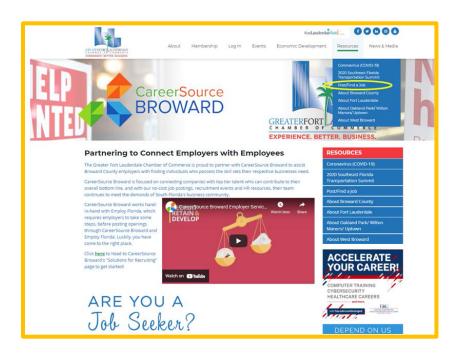




E. Partnerships

Leveraging public and private sector partnerships allows CSBD to communicate its value to the community. Examples of completed partnership action items include:

- An increased presence on chambers of commerce websites, including the Greater Fort Lauderdale Chamber of Commerce, Greater Hollywood Chamber of Commerce, Coral Springs Coconut Creek Regional Chamber of Commerce and the Greater Dania Beach Chamber of Commerce.
- A business resource section included on the Broward County Office of Economic and Small Business Development's website; section includes two links to CSBD's employer services webpage and outreach video.
- Information related to CSBD services featured in industry association newsletters (SFHHA, SFMA, GFLA, NAWIC, chambers of commerce).







Administrative Office

2890 West Cypress Creek Road Ft. Lauderdale, FL 33309

Memorandum #01 – 21 (Exec)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: One Stop Center Hours of Operation and Holiday Schedule

Date: July 6, 2021

SUMMARY

The Master Agreement (MA) between CareerSource Broward (CSBD) and the Florida Department of Economic Opportunity requires the governing boards' annual approval of the 1) one-stop center hours of operation and 2) the CSBD holiday schedule. There are no changes to our hours of operation or our holidays.

BACKGROUND

The Master Agreement with the State requires us to get our governing board's approval for our hours of operation and holiday schedule at the start of each program year.

DISCUSSION

Below is our One-Stop Center hours of operation and our holiday schedule.

One-Stop Centers – Hours of Operation For PY 21-22

M-TH 8:00 a.m. – 6:00 p.m.

FRI 8:00 a.m. - 5:00 p.m.

The CSBD Holiday Schedule

The state requires that we align our holidays with a federal, state, or county authority. Our holidays are aligned with Broward County.¹

The Broward County Holiday Schedule						
New Year's Day						
Martin Luther King, Jr. Day	Labor Day	Christmas Day				
Presidents' Day	Veterans Day	2 Personal days (regular employees)				
Memorial Day	Thanksgiving Day					

RECOMMENDATION

Approval of 1) The One-Stop Centers hours of operation and 2) alignment of the CSBD holidays with Broward County's Holiday schedule.

As many of our governing board members are aware the federal government has declared Juneteenth a new federal holiday. At this time the County has not added Juneteenth to its holiday schedule. If it does we will bring the holiday schedule back to the governing boards for consideration.

Administrative Offices 2890 West Cypress Creek Road Fort Lauderdale, FL 33309



Memorandum #21-20 (CBR)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Hospitality Industry Survey Results

Date: June 30, 2021

SUMMARY

CareerSource Broward (CSBD) distributed a survey to hospitality workers registered in Employ Florida regarding their intentions to return to their jobs. The number of responses was not statistically sufficient to extrapolate reliable conclusions. However, we are sharing anecdotal information which may help employers to strategize in encouraging employees to come back to work. Our anecdotal information is aligned with a larger FAU study. Reviewed at the 7/6 Employer Services Committee meeting.

BACKGROUND

Earlier this year, in response to a need voiced by the hospitality industry, CSBD convened an employer task force to share information on solutions to the shortage of workers in restaurants, hotels, motels and other service industries. The task force asked CSBD to reach out to the 4,000 individuals registered in Employ Florida (EF), who had identified themselves as hospitality workers, and to query them regarding their future employment plans. The survey which was available in English, Spanish, and Haitian-Creole, was also shared with various hotel and restaurant managers to distribute to former employees.

DISCUSSION

As our committee and board members are aware we can survey registrants in Employ Flordia, but responses are voluntary. The number of responses received, 125, did not provide a statistically sufficient sample from which we can draw data based conclusions.¹

Listed below are individual responses taken from the surveys returned. The responses provide insight into the workers' perspectives as follows:

 86 of the total responses received indicated the workers would return to work. The balances of the respondents do not intend to return to their jobs. Below are some of the comments from those saying they would not return:

¹ We will share the anecdotal information with the Broward County Tourism Coalition Council meeting later this month which they can consider together with the FAU survey results.

- "I will not be going back to work with my previous employer. I plan on moving on with another employer who treats their employees better"
- "I can get better pay and benefits elsewhere," and in the same vein, "The salary is not good and I do not have free time to go to school"
- * "Not returning now. Employees are testing positive for COVID every week and that worries me"
- "I don't want to touch customers' used silverware, napkins, or glasses"
- "Time for a career change"
- Lack of social distancing
- Unhappy with the work schedules
- 2. 50 of the employees identified in #1 above, who intend to return to work, say they will do so between July and September.
- 3. About 31 of the respondents not immediately returning to work stated that they would reconsider if the pay was better or if there was more schedule flexibility.
- 4. Regardless of whether the employees were returning to work, 91 of the respondents said they would not return to their previous employer. In some instances they can't because the business closed. However, wages continues to come up as an issue and some employees took exception to their working conditions and their perception that they were not treated well.

While the number of responses received did not represent a statistically sufficient sample, our survey results aligned with the Florida Atlantic University survey. Employers can review the detail provided in connection with the employees' responses and consider possible changes they may want to implement in their workplace.

RECOMMENDATION

None. For information only.



Memorandum #10 – 20 (FS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: General Fund Balance

Date: June 30, 2021

SUMMARY

On 12/31/20 the General Fund balance was \$739,486 which includes the set asides in Chart 1. Since then, we have realized revenues of \$212,078, including depreciation of \$111,511 and expenditures of \$124,253 resulting in a balance of \$827,311 as of 5/31/21. As the Audit Committee meets directly prior to the meeting the recommendations will be presented at the Executive Committee meeting.

BACKGROUND

CSBD sets aside a portion of the General Fund to:

- 1. Assure that funds are available in the event of a questioned or disallowed cost. While we carry D&O insurance we set aside funds, as not every type of expenditure is covered by our insurance.
- 2. Cover principal payments for the CSBD 2890 W. Cypress Creek Blvd. building. Our grants pay for the interest on the mortgage and straight line depreciation based on 25 years. The depreciation is paid into the General Fund and is used to pay for the mortgage principal. As is true of most mortgages, payments in the earlier years are mostly interest and are covered by the grants. In later years as the majority of the payment is made up of the principal the depreciation collected and paid to the General Fund will be applied to pay for the principal.

The governing boards have approved the set aside of the depreciation payments each year until we have sufficient funds collected to pay the principal as the mortgage ages. Fiscal has calculated the amount that will be needed to pay the principal and tracks it on a monthly basis.

Fiscal has updated the General Fund Memo so the governing boards will be apprised of the payments toward the principal as it increases over time and will also be able to see expenditures and revenues related to our other activities. The depreciation payment to the General Fund is not reported in the revenue or expenditure schedule as it appears in the Chart for the set-asides along with the other governing boards' approved set asides.

Chart 1
General Fund Set Asides

Category	Dollar Amount
Contingency set aside	\$250,000
Depreciation collected to date minus principal payments charged against the depreciation reported in Chart 3 Expenditures) ¹	\$399,109
Total	\$649,109

Chart 2, below is the list of projected expenditures approved by the CSBD Council that can be charged against the General Fund. Actual expenditures fluctuate and are reported each year.

Chart 2
Board Approved Cost Items

Category	Dollar Amount
Food	\$23,500
Ticket to work Staff Salary/Benefits & Overhead	\$98,500
Application of our Indirect Cost Rate	\$18,281
Total	\$140,281

DISCUSSION

The beginning balance as of 12/31/20 in the General Fund was \$739,486. During the reporting period of 1/1/21 - 5/31/21, revenues received were \$212,078 and expenditures were \$124,253 as shown in Chart 3. The ending balance of the General Fund as of 5/31/21 was \$827,311 including the set asides. Chart 3, below is a list of current expenditures.

Chart 3
Revenues and Expenditures for the period 1/1/21 – 5/31/21

Category	Revenues	Expenditure	Comments
Investment Interest	\$277		
Reimbursement to CSBD	\$100		Restitution of funds
FDOT Grant	\$1,000		Grant has ended
Ticket to Work (TTW)	\$99,190	\$19,254	
PY 20-21 Building Principal		\$73,638	Since inception of mortgage Principal paid is \$470,997
Food per Board approval		\$3,262	
Indirect Costs		\$5,060	
Total	\$100,567	\$124,253 ²	

¹ Depreciation for the period of 10/1/2020-5/31/2021 is \$111,511

² The total includes \$23,039 in excess of the salary cap paid to the former president reported previously

The General Fund balance of as of 5/31/21 of \$827,311 minus the set aside of \$649,109 is \$178,202.

RECOMMENDATION

None. For information purposes.

Attachment:

General Fund Spreadsheet

$\label{eq:CareerSource Broward}$ General Fund Revenues and Expenditures and Available funds $1/1/21 \ to \ 5/31/21$

Balance 1/1/2021				\$ 739,486
Revenues: Interest Other reimbursements / credits Depreciation in excess of principle paid		\$	277 100 37,873	
Florida Department Of Revenue (FDOT): Revenues Expenditures	\$ 1,000			
T. I T			1,000	
Ticket To Work (TTW) : Revenues Expenditures	99,190 19,254)			
Net From Ticket To Work			79,936	
Total Revenues				119,186
Expenditures: Former President's salary over the federal cap Food Indirect costs Total Expenditures			(23,039) (3,262) (5,060)	(31,361)
Balance 5/31/2021				\$827,311
Less Reserves: Contingency funds Funds collected for depreciation		•	250,000) 399,109)	(649,109)
General Fund Balance 5/31/2021				\$ 178,202



Memorandum #11 – 20 (FS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Budget vs. Expenditure Report

Date: June 30, 2021

SUMMARY

Detailed below is the Budget vs. Expenditure Report. We have divided the report into 2 charts because some of the funding streams are awarded on July 1st in accordance with the WIOA program year and our other funding streams are awarded on October 1st in accordance with the federal fiscal year. The report identifies some under-expenditure in WIOA largely due to participants staying home during the pandemic. Our plan for assuring expenditures in these funding streams is described below. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

This report is presented in accordance with the Audit Committee's request for updates regarding the budget as compared to actual expenditures. The committee is reminded that expenditure fluctuations occur as a result of invoices from vendors/sub-recipients, OJTs, ITAs, and support services being submitted at different times.

DISCUSSION

Our budget vs expenditures are distributed between 2 charts. Chart 1 covers the funds awarded on a program year basis July 1 – June 30 (in this memo through May 31st) or 92% of the program year. ¹

Chart 1
Budget vs. Actual for 7/1/20 - 5/31/21 or 92% of the Program Year

Notes	Funding Stream	Final PY 20-21 Budget	Actual Expenditures 7/1/20 - 5/31/21	% Expended
1	Welfare Transition (WTP)	4,237,809	3,518,054	83%
2	WIOA Adult / Dislocated Worker (AD / DW)	10,130,261 ²	7,963,331	79%
3	WIOA Youth	4,123,274	2,254,355	55%

¹ The Executive Committee is reminded that our pervious PY 20/21 will not be closed until August.

² Includes an additional \$28,438 accepted in May 2021.

- 1. Welfare Transition We are on target to spend our allocation by 6/30/21.
- 2. WIOA AD / DW We did see a rise in customers interested in training during the 4th guarter which will increase total expenditures for the year resulting in less than a 20% carryforward.³ The funds carried forward have been projected for expenditure in the approved PY 21-22 budget.
- 3. WIOA Youth As we have reported COVID-19 severely hampered the ability of our service providers to spend the required 20% youth allocation set aside for work experience. The youth funds are being carried forward into the next program year (See Footnote 3). Some of the funds carried forward are 1) dedicated to the new "Recruiter" position as well as master tutors at the School Board and 2) to cover staff increases in the navigator contracts.

We are also planning to bring a recommendation to the One-Stop Committee to fund a small in-school youth employability skills/work experience program for high school seniors as we received a bump in our youth allocation this year. This will incent high school seniors to stay engaged until graduation and will have a positive impact on our performance. We have spoken to the School Board and they are excited about being funded to support in-school WIOA eligible youth ⁴ graduation rates.

Chart 2 covers the funds awarded on a federal fiscal year basis October 1 – September 30 (in this memo through May 31st) at 67% of the federal fiscal year.

Chart 2 Budget vs. Actual 10/1/20-5/31/21 at 67% of the Year

Notes	Funding Stream	Final PY 20-21 Budget	Actual Expenditures 10/1/20 - 5/31/21	% Expended
1	Wagner Peyser (WP)	1,098,644	752,278	68%
2	Veterans	285,512	150,420	53%
3	SNAP	343,495	233,321	68%

- 1. Wagner Peyser On target
- 2. Veterans The state has extended use of these funds to 12/31/21. We expect to fully utilize the funds by the end of the extension period.
- 3. SNAP On target.

RECOMMENDATION

None. For information purposes only.

³ As the Executive Committee is aware we can carry forward 20% of the allocation, we have two years in which to spend each year's WIOA allocation and funds are accounted for on a "first in first out" basis. As a result we are always within the allowable carryforward limits.

4 WIOA in-school youth must be economically disadvantaged in accordance with the federal definition and have an

additional barrier in order to be eligible.



Memorandum #03 – 21 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Results of the Cherry Bekaert, LLP Fiscal Monitoring – Report #2

PY 20/21 Issued 04/21

Date: June 16, 2021

SUMMARY

Cherry Bekaert conducted fiscal monitoring for the period 10/1/20 through 2/28/21. Cherry Bekaert reviewed a total of 936 elements during the review period. There were no findings and 1 observation. Based upon the total elements reviewed, this was a 0% error rate. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

Cherry Bekaert monitors fiscal activities three times a year. This was the second monitoring for the program year.

DISCUSSION

Cherry Bekaert conducted fiscal monitoring for the period 10/1/20 through 2/28/21. Cherry Bekaert reviewed a total of 936 elements during the review period. There were no findings. Based upon the total elements reviewed, this was a 0% error rate.

There was 1 observation.

Observation - Mileage Reimbursements

During the review of the mileage reimbursements, it was noted that one mileage reimbursement request was for three months of travel, instead of being submitted monthly by the 10th of the month as required by CareerSource policy. The policy allows for an exception to be made by the Executive Vice President, who in this case approved an exception in accordance with policy guidelines.

Recommendation

We recommend that CareerSource management review internal travel policy, number 320, to ensure requests are completed in accordance with policy requirements.

Agree/ Disagree

Agree

Resolution

The mileage request exception was identified at the time of approval per the Executive Vice President. Staff have been reminded regarding the proper submission of mileage requests to ensure this is not a repeat observation.

RECOMMENDATION

None. For information purposes only.

QA #03-21 ATTACHMENT A Cherry Bekaert Fiscal Findings - PY 20-21 Monitoring Report #2		
Procedure	Report #1 7/1/20 - 9/30/20	Report #2 10/1/20 - 2/28/21
Bank Reconciliation - Accounts Payable Master Account	0	0
Bank Reconciliation - General Fund Account	0	0
Bank Reconciliation - Operating Master Account	0	0
Bank Reconciliation - Participant Payroll Account	0	0
Bank Reconciliation - Staff Payroll Account	0	0
BOD Disclosures	N/A	0
Budget vs. Actual Grants/Programs	0	N/A
Cancelled Checks	N/A	0
Cash Draw	0	0
Cash Receipts	0	0
Cell Phone Expenditures Customer-Related Expenditures - WIOA (ITA/DW/Adult),	0	0
Youth Support & WTP	0	0
Disaster Grant Control Review	0	N/A
EmpHire Payroll	0	0
Employee Separations	0	0
Forensic Testing – Journal Entry Review	N/A	0
Indirect Cost Allocation	0	N/A
Insurance	0	0
Local Plan Review	0	0
Mileage Reimbursements (Individuals)	N/A	0
Mileage Reimbursements (Service Provider)	N/A	0
Non-Payroll Expenditures	0	0
On-the-Job Training (OJT)	0	0
Participant Payroll	0	0
P-Card Expenditures	0	0
Previous Year-end Audit Adjusting Journal Entries	0	0
Procurements - Micro Purchases	0	0
Procurements - Non-Competitive	0	0
Procurements – RFP/Bid	N/A	0
Procurements - Small Purchases	0	0
Property Management - PPE	0	N/A
S.E.R.A. Financial Reporting	0	N/A
Staff Payroll	0	0
Subawarding/Subrecipient Monitoring	0	0
Travel Reimbursement	0	0
Youth Support Payments	N/A	0
TOTAL This short provides a breakdown of fiscal findings by getagany type	0	0

This chart provides a breakdown of fiscal findings by category type.



Memorandum #01 – 21 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Results of the Taylor Hall Miller Parker (THMP), P.A.

Program Monitoring Report #1 – PY 20/21 – Issued 2/21

Date: June 16, 2021

SUMMARY

THMP conducted program monitoring for the period 7/30/20 through 11/19/20. They reviewed a total of 179 files consisting of 7,633 elements. There were 4 findings and 3 observations. This equates to an error rate of (.05%) less than 1%. All findings and observations were corrected except where cases were closed and no further action could be taken. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

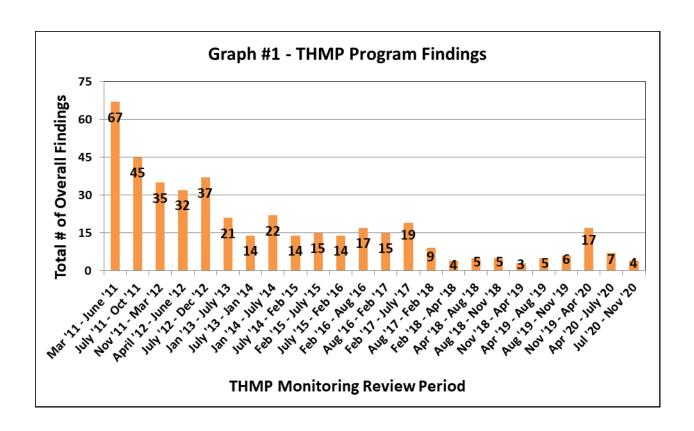
THMP monitors program activities three times a year. This was their first report for PY 20/21.

DISCUSSION

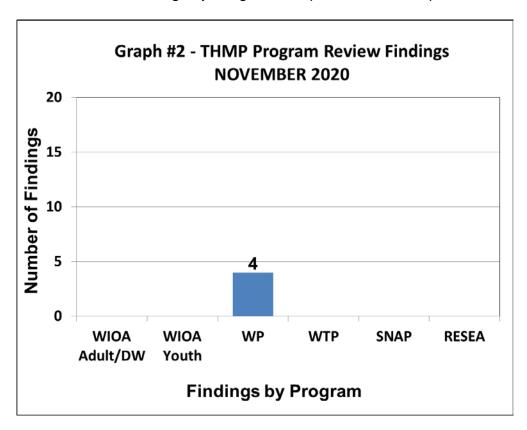
THMP identified 4 findings and 3 observations during their program monitoring visit. They reviewed a total of 179 files consisting of 7,633 elements. This equates to an error rate of (.05%) less than 1%. This monitoring covered the period through 11/19/20.

THMP Program Findings

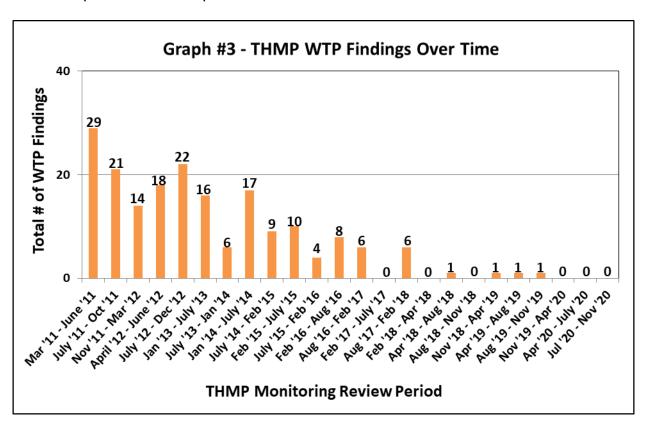
A trending chart for THMP program findings, per review period since March 2011, is represented in Graph #1, as follows:



A breakdown of findings by Program is represented in Graph #2, as follows:



A trending chart for THMP WT Program (WTP) findings per review period since March 2011 is represented in Graph #3 as follows:



THMP Program Findings for the period of July 2020 - November 2020

The findings and observations in this report were forwarded to the Career Center and Program Managers for resolution and responses. The findings and observations are presented by the funding stream, along with the corrective action taken.

I. WIOA Adult/Dislocated Worker

- A. 30 WIOA Adult and Dislocated Worker files were reviewed, 10 from each center. There were no findings or observations.
- B. 5 National Dislocated Worker Grant (NDWG) COVID-19 files were reviewed. There were no findings or observations.

II. WIOA Youth

20 WIOA Youth files were reviewed: 6 Broward College, 1 Center for Independent Living of Broward (CILB), 4 FLITE Center, 2 HANDY, and 7 School Board of Broward County. There were no findings.

There was one WIOA Youth observation.

Observation WIOA Youth

There were no recent case notes in Employ Florida documenting contact or contact attempts for one youth. (HANDY-1)

Recommendation

Staff should ensure that regular contact is maintained with each youth and documented in Employ Florida in a timely manner.

Agree/ Disagree

Agree

Resolution

A case note was entered into Employ Florida to reflect the youth's status in the program. The WIOA Youth Program Manager reminded the HANDY Success Coach that a minimum of 1 case note per month must be entered for each youth in the program.

III. Wagner-Peyser (WP)

A. 30 WP files were reviewed, 10 from each Center. There were **2** findings and no observations.

Findings WP Services

- 1) Although there was documentation to create an account in Employ Florida, a case note was missing to document the customers' permission. (Central-1)
- 2) One customer's Employ Florida registration was missing an O*Net code and the entry of a complete background wizard or résumé. (Central-1)

Recommendation

- a) Staff should ensure a customer's permission to create an Employ Florida account is documented in a case note.
- b) Staff should ensure a customer's Employ Florida registration contains all elements prior to providing services.

Agree/ Disagree

Agree

- 1) The Disability Success Coach was retrained to add the case note in Employ Florida.
- 2) The Success Coach is currently on a Performance Improvement Plan (PIP); she was provided additional training and is being closely monitored.

B. 30 WP job orders were reviewed. There were 2 findings.

Findings WP Job Orders

- 1) One job order did not state the reason for the age restriction, "must be at least 18 years of age." (Job Order Unit -JOU -1)
- 2) Staff did not document the verification of a newly registered employer in Employ Florida. (JOU-1)

Recommendation

- a) Staff should ensure that if the job order has an age restriction, the reason for the restriction is listed.
- b) Verification of a newly registered employer should be documented in Employ Florida.

Agree/ Disagree

Agree

Resolution

This involved a specific JOU staff member who is no longer employed.

There was 1 WP job order observation.

Observation WP Job Order

One job order's O*Net code did not match the job order description. (JOU-1)

Recommendation

Staff should review the O*Net code listed on the job order to ensure it matches the job description.

Agree/ Disagree

Agree

Resolution

This involved a specific JOU staff member who is no longer employed.

IV. Reemployment Services and Eligibility Assessment (RESEA)

10 RESEA files were reviewed, 4 from Central and 6 from South. There were no findings or observations.

V. Welfare Transition Program (WTP)

A. 24 WTP files were reviewed, 8 from each Center. There were no findings. There was 1 WTP mandatory observation.

Observation WTP Employment

A wage rate less than Florida's Minimum Wage was entered into the Employment Details screen in OSST for one customer.

Recommendation

When entering employment in OSST, staff should ensure that the wage rate meets Florida's Minimum Wage.

Agree/ Disagree

Agree

Resolution

The wage record was updated.

On 1/6/21, the WTP and SNAP Program Manager trained WTP and SNAP staff on how to enter employment for individuals paid an hourly wage below \$8.65 per hour (e.g., for individuals with varied hours, receiving tips, etc.). Supervisors were reminded to pull a monthly employment report to check wages. There is also an annual contract tracker reminder for the WTP/SNAP Program Manager to address the new minimum wage with staff every September due to the recent Florida minimum wage legislation requiring changes over the next 6 years.

B. 20 WTP Transitional files were reviewed (6 from North, 7 from Central, and 7 from South). There were no findings or observations.

VI. <u>Supplemental Nutritional Assistance Program (SNAP)</u>

10 SNAP files were reviewed, 5 Central and 5 South. There were no findings or observations.

RECOMMENDATION

None. For information purposes only.



Memorandum #02 – 21 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Results of the Taylor Hall Miller Parker (THMP), P.A.

Program Monitoring Report #2 - PY 20/21 - Issued 4/21

Date: June 16, 2021

SUMMARY

THMP conducted program monitoring for the period 11/19/20 through 02/26/21. They reviewed a total of 181 files consisting of 7,089 elements. There were 20 findings and 9 observations. This equates to an error rate of (.28%) less than 1%. All findings and observations were corrected except where cases were closed and no further action could be taken. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

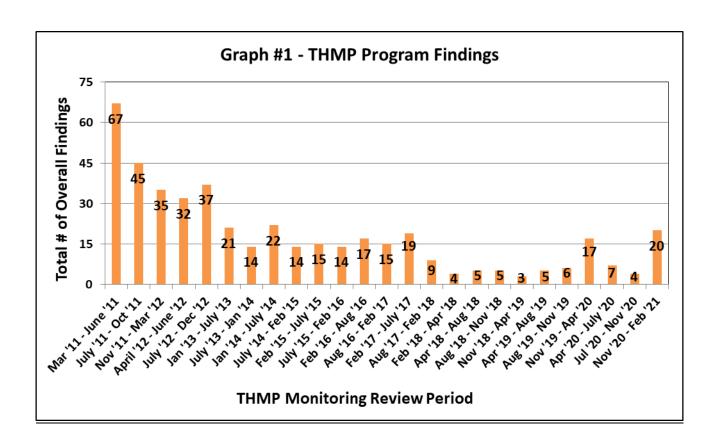
THMP monitors program activities three times a year. This was their second report for PY 20/21.

DISCUSSION

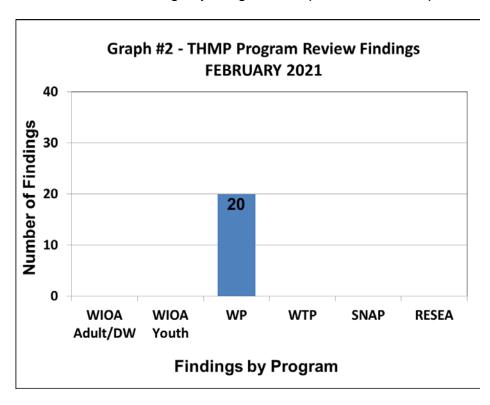
THMP identified 20 findings and 9 observations during their program monitoring visit. They reviewed a total of 181 files consisting of 7,089 elements. This equates to an error rate of (.28%) less than 1%. This monitoring covered the period through 02/26/21.

THMP Program Findings

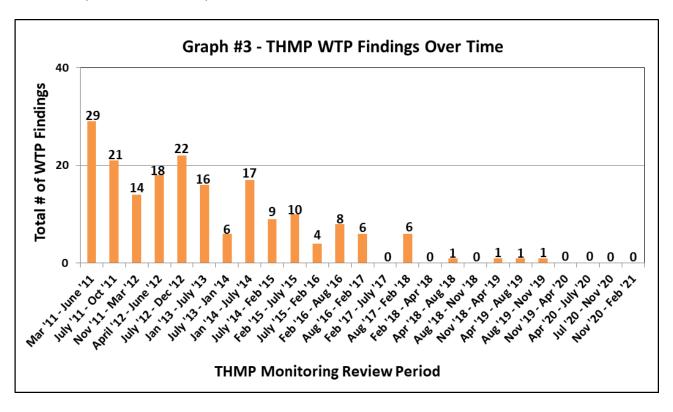
A trending chart for THMP program findings, per review period since March 2011, is represented in Graph #1, as follows:



A breakdown of findings by Program is represented in Graph #2, as follows:



A trending chart for THMP WT Program (WTP) findings per review period since March 2011 is represented in Graph #3 as follows:



THMP Program Findings for the period of November 2020 – February 2021

The findings and observations in this report were forwarded to the Career Center and Program Managers for resolution and responses. The findings and observations are presented by the funding stream, along with the corrective action taken.

I. WIOA Adult/Dislocated Worker

- A. 24 WIOA Adult and Dislocated Worker files were reviewed, 8 from each center. There were no findings or observations.
- B. 6 WIOA Adult and Dislocated Worker files that exited the program within the last 12 months were reviewed, 2 from each center. There were no findings or observations.
- C. 4 National Dislocated Worker Grant (NDWG) files were reviewed. There were no findings or observations.

II. WIOA Youth

- A. 16 WIOA Youth files were reviewed: 4 Broward College, 4 FLITE Center, 3 HANDY, and 5 School Board of Broward County. There were no findings or observations.
- B. 6 WIOA Youth files that were closed in Employ Florida within the last 12 months were reviewed: 1 Broward College, 1 Center for Independent Living (CILB), 2 FLITE Center, 1 HANDY, and 1 School Board of Broward County. There were no findings or observations.

III. <u>Wagner-Peyser (WP)</u>

A. 30 WP files were reviewed, 10 from each Center. There were 3 findings.

Findings WP Services

- 1) 2 staff-assisted customer registrations were missing a case note documenting the customer's permission to create the account in Employ Florida. (North-1, Central 1)
- 2) A complete registration was not documented in Employ Florida for 1 customer prior to staff providing services. (North-1)

Recommendation

- a) Staff should ensure a customer's permission to create an Employ Florida account is documented in a case note.
- b) Staff should ensure a customer's Employ Florida registration contains all elements prior to providing services.

Agree/ Disagree

Agree

- 1) The Central Customer Service Liaison has been counseled and placed on a performance improvement plan that included a review of Policy 551: WP Job Referral Services, along with the supervisor's review for compliance.
- 2) Job Club Facilitators will be trained on how to assist a customer with registration and how to properly document when doing staff-assisted registration.
- 3) On 5/7/21, the Center Managers sent an email to all staff reminding them of staff-assisted registration requirements to check for a customer's full registration.
- 4) A Registered Individuals Report on staff-assisted Employ Florida registrations was added to the Report Matrix for the WP Program Manager. WP Supervisors will be reminded when doing monthly desk reviews to include staff-assisted registrations by running this report.

There were 3 WP Services observations.

Observations WP Services

- 1) The short- and long-term occupational goals listed on the EDP for 1 customer were not specific occupational goals. (North-1)
- 2) Case notes documenting a job development service for 2 customers were missing information. (North-1, Central-1)

Recommendation

- a) The EDP should list a specific occupational goal for both the short- and long-term goals.
- b) Case notes documenting a job development service should include all of the following information: employer's name, employer's phone number, employer's address, date of contact, and the position/title of the job.

Agree/ Disagree

Agree

Resolution

- 1) The observation regarding the lack of specific occupational goals on the EDP was an isolated incident involving a WIOA Job Developer. Staff received coaching and will review applicable policies to ensure this error is not duplicated in the future.
- 2) Staff copied an old Employ Florida case note template that was not in compliance with current policies and regulations.
- 3) A report on recent job development service codes (i.e., 123/E34) was pulled for all related staff and spot-checked for compliance. No issues were noted.
 - B. 30 WP job orders were reviewed. There were **17** findings.

Findings WP Job Orders

- 3 job orders listed inappropriate requirements, by not stating the reason for the age restriction or using inappropriate wording, "must pass drug test." (Job Order Unit – JOU -3)
- 2) There was no case note in Employ Florida documenting staff's review and verification of 11 job orders within two business days of their posting. (JOU-11)
- Staff's verification of 3 newly registered employer's registration was not documented in Employ Florida or was not verified within two business days of the initial registration. (JOU-3)

Recommendation

- a) Staff should ensure that appropriate requirements are listed in job orders.
- b) Staff should review employer-posted job orders for compliance within two business days and document this in a case note in Employ Florida.
- c) Staff should review new employer registrations within two business days and document this in a case note in Employ Florida.

Agree/ Disagree

Agree

Resolution

This was isolated to one Job Order Unit staff member who was coached about the job order maintenance policy and its understanding. He was counseled and placed on a performance improvement plan. The staff member's job order edits were subsequently monitored for compliance. This staff is no longer working with CSBD as of 5/21/21. Additionally, biweekly peer reviews are being conducted in the Job Order Unit.

There were 3 WP job order observations.

Observations WP Job Order

- 1) The O*Net code for 1 job order did not match the job description. (JOU-1)
- 2) The case note verifying 1 employer registration did not document the method of contact and title of the person verifying the information. (JOU-1)
- One job order was not reviewed by staff within 2 business days of the job order posting. (JOU-1)

Recommendation

- Staff should ensure the O*Net code listed on the job order matches the job description.
- b) Staff should ensure the case note documenting employer registration verification includes all required information.
- c) Staff should review employer job order postings within two business days.

Agree/ Disagree

Agree

Resolution

This was isolated to one Job Order Unit staff member who was coached about the job order maintenance policy and its understanding. He was counseled and placed on a performance improvement plan. The staff member's job order edits were subsequently monitored for compliance. This staff is no longer working with CSBD as of 5/21/21. Additionally, biweekly peer reviews are being conducted in the Job Order Unit.

IV. Reemployment Services and Eligibility Assessment (RESEA)

10 RESEA files were reviewed, 4 from Central and 6 from South. There were no findings or observations.

V. Welfare Transition Program (WTP)

A. 24 WTP mandatory files were reviewed, 8 from each Center. There were no findings. There were 3 WTP mandatory observations.

Observations WTP IRPs

Support services provided were not recorded on the IRPs for 3 customers. (North-2, Central-1)

Recommendation

Staff should ensure support services provided to customers are recorded on the IRP.

Agree/ Disagree

Agree

Resolution

The WTP Program Manager implemented opening all services at assessment as of 3/1/21. This will eliminate the oversight as services will already be open.

B. 21 WTP Transitional files were reviewed, 7 from each Center. There were no findings or observations.

VI. Supplemental Nutritional Assistance Program (SNAP)

10 SNAP files were reviewed, 5 Central and 5 South. There were no findings or observations.

RECOMMENDATION

None. For information purposes only.



Memorandum #04 – 21 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Acceptance of the DEO Program Monitoring Report dated March 31, 2021

Date: June 16, 2021

SUMMARY

The Florida Department of Economic Opportunity (DEO) issued their Program Monitoring Report for the period 4/19 through 3/20, on 3/31/21. They reviewed a total of 218 files consisting of 5,852 elements. There were 9 findings and 7 non-compliance issues. The findings equate to an error rate of (.27%) less than 1%. All findings and non-compliance issues were corrected except where cases were closed and the observations were addressed. Our Corrective Action Plan was accepted on 4/30/21. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

The DEO conducted its annual program monitoring review in June 2020. The review covered the period April 1, 2019, through March 31, 2020.

The following programs were reviewed:

- 1. Welfare Transition Program (WTP)
- 2. Supplemental Nutrition Assistance Program (SNAP)
- 3. Workforce Innovation and Opportunity Act (WIOA)
- 4. Trade Adjustment Assistance (TAA)
- 5. Wagner-Peyser (WP)

DISCUSSION

The DEO identified 9 findings and 7 "non-compliance", which means these, could be a finding in the future if not corrected. All the findings and non-compliance issues were corrected and the observations were addressed. They reviewed a total of 218 files consisting of 5,852 elements. The findings equate to an error rate of (.15%) less than 1%.

State Program Findings for the period of April 2019 – March 2020

The findings and observations in this report were forwarded to Career Center and Program Managers for resolution and responses. The findings and observations are presented below along with the corrective action taken.

Finding WT 22-01 — Grievance/Complaint and Equal Employment Opportunity (EEO) Form

A signed and dated Grievance/Complaint and EEO form was missing in one case file. (Central-1)

Recommendation

CSBD should ensure all participants sign and date the Grievance/Complaint and EEO form acknowledging they have been made aware of their rights.

Agree/ Disagree

Agree

Resolution

- This was an applicant case who received upfront diversion. The Success Coach
 accidentally omitted the provision of the Grievance/Complaint and EEO form for the
 customer to sign. This was an isolated incident limited to one Success Coach who
 is no longer with the agency.
- CSBD has updated its Upfront Diversion policy to reflect the timeliness of providing the Grievance/Complaint and EEO form.
- In August 2020, the WTP Program Manager conducted a review of this monitoring with staff, which included a review of the findings and noncompliance issues.
- Our QA monitoring tool includes a file sample review to assure compliance with Grievance/Complaint and Equal Employment Opportunity (EEO) Forms.

Finding WT 22-02 – Documentation of Safety Plan/Safety Plan Elements (*Prior Year Issue*)

A safety plan was not documented in the case file of one participant identified as a victim of domestic violence. (Central-1)

Recommendation

CSBD should complete a safety plan and include its elements on either the Individual Responsibility Plan (IRP) or the Alternative Requirement Plan (ARP) for individuals identified as victims of domestic violence.

Agree/ Disagree

Agree

Finding WT 22-02 – Documentation of Safety Plan/Safety Plan Elements (Cont.)

Resolution

- Over the years, CSBD has disagreed with this finding because we contract with our local domestic violence agency to provide a safety plan for customers as they have the expertise to address domestic violence issues. We also received State approval to do this. However, since this continues to be a finding we have changed our processes and CSBD Career Center Success Coaches now work with the WTP customer to create a safety plan if the customer discloses that they are a victim of domestic violence.
- In November 2020, regional training was conducted with staff, which included a review of the findings and noncompliance issues of this monitoring.
- On 11/13/20, email guidance was sent to staff on the new process for assisting victims of domestic violence.
- Our QA monitoring tool includes a file sample review to check for the safety plan, where warranted.

Finding WT 22-03 – Documentation of Activity Hours Recorded on the Job Participation Rate (JPR) Screen *(Prior Year Issue)*

A case file did not contain documentation to support all weekly hours recorded in OSST. (South-1)

Recommendation

CSBD should ensure that documentation for participation rate hours are verified by staff prior to entering the hours in OSST.

Agree/ Disagree

Agree

- State guidance was not clear on how to document holiday hours for employed customers. CSBD sought guidance from the State, which we received on 9/15/20, and have since trained staff on how to document these hours for employed customers.
- The case file could not be updated with timesheets or other documents to support all required hours since the case was already closed.
- On 9/23/20, email guidance was sent to staff on how to prevent issues from recurring.

Finding WT 22-03 – Documentation of Activity Hours Recorded on the JPR Screen *(Cont.)*

- CSBD has updated its JPR policy, which provides specific examples for staff reference to ensure this doesn't happen again.
- In October 2020, a regional review of cases with JPRs was conducted and did not reveal any additional cases that had this error.
- Our QA monitoring tool includes a file sample review to ensure compliance with the documentation of activity hours recorded on the JPR screen.

Finding WT 22-04 – Pre-penalty and Sanction Process (*Prior Year Finding*)

- A. The Notice of Failure to Demonstrate Satisfactory Compliance form (WTP 2292) was missing in one case file. (North-1)
- B. Penalties and sanctions for three participants were not requested or ended timely in the system. (North-2, South-1)

Recommendation

- A. CSBD should ensure participants are made aware of what they are required to do to stay in compliance with program requirements prior to initiating the penalty.
- B. If an individual does not report "good cause" for a second failure within three working days, CSBD should request a sanction.

Agree/ Disagree

Agree

Resolution

A. Missing WTP 2292 form

- The missing Notice of Failure to Demonstrate Satisfactory Compliance form (WTP 2292 form) was not scanned by the Success Coach. This was an isolated incident by a staff member who is no longer with the agency.
- CSBD has implemented a WTP Success Coach Daily Case Checklist Log to ensure required actions are taken on mandatory cases each day, which includes scanning documents into the Document Management System (DMS).

Finding WT 22-04 – Pre-penalty and Sanction Process (Cont.)

B. Timely Penalties and Sanctions

- The State penalty and sanction policy was confusing to staff due to the different options for the dates to lift the sanction. CSBD has provided feedback to the State with recommended changes to their policy, which they are considering.
- In February 2021, staff received specialized training on this topic by our external monitors, Taylor, Hall, Miller, Parker, PA.
- CSBD has updated its WTP Case Noting Policy to include specifics regarding the pre-penalty and sanction process.
- Our QA monitoring tool includes a file sample review to ensure compliance with the pre-penalty and sanction process.

Non-Compliance Issue WT 22.00.01 - IRPs

(Prior Year Issue)

2 IRPs did not include the assigned weekly activities participants were required to complete. (Central-1, South-1)

Recommendation

CSBD should ensure the IRP includes all required elements (i.e. employment goals, assigned weekly activities, and services provided to participants).

Agree/ Disagree

Agree

- The IRP for one case was updated with the required components and the other
 case could not be updated because it was closed. Both Success Coaches are no
 longer employed with the agency.
- In August 2020, the WTP Program Manager conducted a review of this monitoring with staff, which included a review of the findings and noncompliance issues.
- CSBD updated its IRP policy and IRP to make it clearer for staff to ensure all required elements are completed.
- Our QA monitoring tool includes a file sample review to ensure IRP compliance.

Non-Compliance Issue WT 22.00.02 – Employment Verification (*Prior Year Issue*)

Employment dates on documentation in one case file did not match the information recorded in OSST for the participant. (North-1)

Recommendation

CSBD should ensure employment documentation in the participant's case file matches what is recorded in OSST.

Agree/ Disagree

Agree

- This Success Coach incorrectly entered the information into OSST. This was an isolated incident by a Success Coach who is no longer with the agency.
- In August 2020, the WTP Program Manager conducted a review of this monitoring with staff, which included a review of the findings and noncompliance issues of this monitoring.
- CSBD has implemented a requirement for the WTP Supervisor to pull a monthly Employment Report from OSST and spot-check employment entries to ensure they match the Employment Verification Form.
- Our QA monitoring tool includes a file sample review to assure compliance with employment verification.

Non-Compliance Issue SNAP 22.00.03 – Assignment of Activity Hours (*Prior Year Issue*)

1 SNAP participant had more than 39 Job Search (JS)/ Job Search Training (JST) hours assigned in OSST per month. (Central-1)

Recommendation

CSBD should ensure that SNAP participants are assigned to the correct number of hours when assigned to JS/JST in combination with other activities.

Agree/ Disagree

Agree

- The State guidance wasn't clear that staff could not reopen activities in the same month.
- The case is open with no activity due to the participation waiver; however, we cannot correct the number of assigned hours once the activity has been closed.
- This Success Coach incorrectly reopened activities in the same month that it was opened. This was an isolated incident by a Success Coach who is no longer with the agency.
- In September 2020, the SNAP Program Manager conducted staff training, which included a review of the non-compliance issue.
- CSBD has added monthly SNAP activity review reports to its report matrix.
 Supervisors will pull these reports to ensure duplicates are not entered within the same month.
- Our QA monitoring tool includes a file sample review to ensure compliance with the assignment of activity hours.

Non-Compliance Issue WIOA 22.00.04 – Recording of Measurable Skill Gains (MSG) (*Prior Year Issue*)

10 WIOA Adult and Dislocated Worker participants enrolled in an education or training program did not have an MSG recorded within the program year. (Central-7, South-2, North1)

Recommendation

CSBD should ensure MSGs are recorded in Employ Florida within the program year.

Agree/ Disagree

Agree

- This measure was not negotiated and final guidance was not released by DEO until 12/28/20.
- CSBD has created a temporary workaround report to pull all customers that require an MSG. This information is sent to staff to ensure the customer has an MSG recorded in Employ Florida.
- Based on the guidance that was released in December 2020, staff is currently reviewing all applicable files to ensure MSGs were captured, recorded, and documented appropriately.
- CSBD created an MSG Local Operating Procedure in July 2020. All staff had to read and acknowledge that they understood this policy.
- On 2/25/21, the WIOA Program Manager conducted training for all WIOA staff, which included a review of the findings and noncompliance issues.
- Our QA monitoring tool includes a file sample review to ensure the recording of MSGs.

Finding WIOA 22-05 - Follow Up Services

- A. Casefile documentation was missing to support that follow-up services were offered and/or provided to 1 WIOA adult participant who exited with employment. (Central 1)
- B. Casefile documentation was missing to support that follow-up services were offered and/or provided to 5 WIOA youth special project participants who exited with employment. (Pre-Apprenticeship Youth School Board 5)

Recommendation

CSBD should ensure follow-up services are offered and/or provided to all adult and youth participants who obtain unsubsidized employment upon exit from the program.

Agree/ Disagree

Agree

- CSBD was offering follow-up services however; the case manager did not properly title the activity.
- In August 2020, training was provided to all staff explaining why it was important that the lead into the case note identify the activity. Staff was advised that "Follow-up Services Offered" must be the case note title for these types of services.
- On 10/15/20, CSBD updated its WIOA Case Noting Policy to include sample case notes for all follow-up services offered. All staff had to read and acknowledge that they understood this policy.
- A question was added on the WIOA QA Monitoring Tool to check that the title of the case note is "Follow-up Services Offered."
- Our QA monitoring tool includes a file sample review to ensure compliance with follow-up services.

Finding WP 22-06 – Migrant and Seasonal Farmworker (MSFW) Identification (*Prior Year Issue*)

One MSFW was incorrectly identified and coded as an MSFW. (Central-1)

Recommendation

CSBD should ensure all staff assisting jobseekers correctly identify MSFWs and accurately code them in Employ Florida.

Agree/ Disagree

Agree

Resolution

- Staff monitored and corrected the issues noted prior to the State's monitoring of the files.
- A monthly report is completed by the Wagner-Peyser supervisors to ensure any new MSFW is documented correctly and provided support services. This report is provided to the Wagner-Peyser Program Manager.
- On 10/14/20, training was provided to staff, which included a review of the findings and noncompliance issues in this monitoring.
- Post-monitoring review sessions are held with staff after each review to discuss the results of the monitoring.
- Our QA monitoring tool includes a file sample review to ensure compliance with the documentation of MSFW identification.

Finding WP 22-07 – Job Order Wage Rate Verification (*Prior Year Issue*)

3 job orders with a wage rate listed below the federal or state minimum wage had no documentation to support that staff verified the employer would pay at least the State's minimum wage. (Job Order Unit {JOU}-3)

Recommendation

If an employer chooses to list a wage rate on a job order, CSBD should ensure the wage rate is equal to or higher than the Florida minimum wage at the time the job order is displayed and enter a case note on the job order documenting the verification.

Agree/ Disagree

Agree

Finding WP 22-07 – Job Order Wage Rate Verification *(Cont.)*

Resolution

- On 4/23/21, an email was sent to all Job Order Unit staff detailing the steps related to placing job orders on hold until the minimum wage verification is completed with the employer.
- CSBD policy for handling job orders on hold will be updated to state that job orders will be closed if the wage cannot be verified with the employer within three business days. This will prevent the job order's hold from being released automatically.
- Staff will acknowledge that they understand the policy once it has been updated.
- Our QA monitoring tool includes a file sample review to ensure compliance with job order wage rate verification.

Finding WP 22-08 – Job Seeker Permission for Registration, Referrals, and Requirements for Participation

- A. 5 job seekers with a staff entered registration were missing documentation of the customer's permission to create the new account in Employ Florida. (South-3, Central-2)
- B. 20 job seekers with a service entered did not have a full application documented in Employ Florida. (South-16, Central-3, North-1)
- C. 4 job seeker placements with staff-entered referrals were missing documentation of permission to refer the job seeker. (South-3, Central-1)

Recommendation

CSBD should ensure permission is granted by job seekers prior to the creation of staff entered accounts and staff assisted referrals in Employ Florida.

Agree/ Disagree

Agree

Resolution

A. Permission to Create Account

• A monthly report is completed by the Wagner-Peyser Supervisors to ensure any new staff-created Employ Florida registration is documented correctly and staff received permission from the customer to create the account. This report is provided to the Wagner-Peyser Program Manager.

Finding WP 22-08 – Job Seeker Permission for Registration, Referrals, and Requirements for Participation *(Cont.)*

A., B., and C.

- CSBD updated its Wagner-Peyser Job Referral Services policy to include that prior to entering staff-assisted services; staff is required to ensure a full Employ Florida registration is completed.
- CSBD staff reviewed and acknowledged they have read and understand the CSBD policy for registration and referrals to job orders.
- In September and October 2020, training was provided to staff, which included a review of the findings and noncompliance issues of this monitoring.
- Our QA monitoring tool includes a file sample review to ensure compliance with job seeker permission for registration, referrals, and requirements for participation.

Finding WP 22-09 – Job Order Requirements

1 job order description did not contain the nature, duties, responsibilities, and requirements of the job. (JOU-1)

Recommendation

CSBD should ensure that a job order contains sufficient detail to clearly convey the nature and requirements of the job.

Agree/ Disagree

Agree

- This was an isolated incident made by a CSBD staff member who is no longer employed with the agency.
- On 5/14/21, the current JOU staff were retrained on ensuring that job orders have the job duties listed.
- Our QA monitoring tool includes a file sample review to ensure compliance with the job order requirements.

Non-Compliance Issue WP 22.00.05 – Manual Obtained Employment (*Prior Year Issue*)

1 manually obtained employment for a job order was recorded prior to the date the job seeker started work. (Central-1)

Recommendation

CSBD should ensure manually obtained employments are recorded in Employ Florida only after a job seeker has started working.

Agree/ Disagree

Agree

Resolution

- CSBD updated its Wagner-Peyser Job Referral Services Policy to include CSBD manual obtained employment and proper case noting.
- CSBD staff reviewed and acknowledged they have read and understand the CSBD policy for registration and referrals to job orders.
- On 10/14/20, training was provided to CSBD staff, which included a review of the findings and noncompliance issues of this monitoring.
- Our QA monitoring tool includes a file sample review to ensure compliance with manually obtained employment.

Non-Compliance Issue WP 22.00.06 – Job Referrals (*Prior Year Issue*)

1 job order had a staff referral with a job seeker that did not meet the minimum qualifications. (South-1)

Recommendation

CSBD should ensure the job seeker meets the minimum qualifications of the job order prior to issuing a job referral.

Agree/ Disagree

Agree

- This error was made by a Welfare Transition Success Coach. CSBD provided WP training in September and October 2020, to WTP and WIOA staff.
- CSBD updated its Wagner-Peyser Job Referral Services Policy to include referring a job seeker to a job and requiring that all referrals must meet the minimum requirements of the job order.
- All front-line staff was required to review and acknowledge that they read and understood the CSBD policy.
- Our QA monitoring tool includes a file sample review to ensure compliance of job referrals.

Non-Compliance Issue WP 22.00.07 – Staffing (Private/Temporary Employment) Agencies

1 job order from a staffing agency did not contain the phrase, "Position offered by the no-fee agency." (JOU-1)

Recommendation

CSBD should ensure that all job orders for private/temporary staffing agencies contain the phrase, "Position offered by the no-fee agency."

Agree/ Disagree

Agree

Resolution

- This error occurred with a new staff member at the time and was corrected in July 2020.
- The Job Order Unit Liaison will run a monthly report of job orders posted for employers with a NAICS code for staffing agencies to check for the proper verbiage.
- This report will be provided to the VP of Communications and Business Relations for compliance review.
- Our QA monitoring tool includes a file sample review to ensure compliance with staffing agency job orders to include the phrase "Position offered by the no-fee agency" in the job description section.

RECOMMENDATION

None. For information purposes only.



Memorandum #05 – 21 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Acceptance of the DEO Fiscal Monitoring Report dated March 31, 2021

Date: June 8, 2021

SUMMARY

The Florida Department of Economic Opportunity (DEO) issued their 2019-2020 Financial Compliance Monitoring Report for the period 4/19 through 3/20, on 3/31/21. There were zero (0) findings, non-compliance issues, or observations. There was 1 technical assistance item. Reviewed at the 7/12 Audit Committee which meets directly prior to the Executive Committee meeting.

BACKGROUND

The DEO conducted its annual fiscal monitoring review in April through June 2020. The review covered the period April 1, 2019, through March 31, 2020.

DISCUSSION

The State financial monitoring was conducted by the DEO's Bureau of Financial Monitoring and Accountability (FMA) and the review covered the period April 1, 2019, through March 31, 2020. The State performed a remote review in April through June 2020.

There were zero (0) findings, non-compliance issues, or observations. There was 1 technical assistance item, which means technical assistance was provided to CSBD by the financial monitoring team.

Technical Assistance 22-20-01 – 6.0 Prepaid Program Items

The pre-paid inventory on hand for Gas/Incentive cards and Bus Passes was excessive considering the average monthly usage. <u>CSBD's response</u>: Prior to reordering, an analysis will be conducted to determine if the quantities ordered are reasonable and necessary considering the amounts on hand.

RECOMMENDATION

None. For information purposes only.

Administrative Office 2890 West Cypress Creek Road Ft. Lauderdale, FL 33309



Memorandum #19 - 20 (CBR)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Report on Technology and Construction Industry Employer Forums

Date: June 28, 2021

SUMMARY

CareerSource Broward (CSBD) held two (2) virtual employer forums 1) the technology industry on 5/19 and 2) the construction industry on 5/26 to better understand the impacts of the COVID-19 pandemic. Each forum had a guest speaker followed by a panel discussion and open dialogue allowing for those in attendance to participate and share their experiences and insights. Based on the information shared at the forums, we developed specific strategies and action steps to assist employers in each of these targeted industries. Reviewed at the 7/6 Employer Services Committee meeting.

BACKGROUND

To better understand the impacts of the COVID-19 pandemic on our vital technology and construction industries, CSBD convened two (2) virtual employer forums. Each forum had a guest speaker followed by a panel discussion and open dialogue allowing those in attendance to participate and share their experiences and insights. Representatives from the industry, education, economic, and workforce development agencies attended each forum.

The objective of the forums was to 1) determine the impact of COVID-19 on two of our local targeted industries 2) identify the current skill gaps these industries are facing and 3) provide outreach information about CSBD services to ensure employers are aware of the advantages of utilizing CSBD's work-based training programs.

DISCUSSION

Technology Industry Forum

The forum was held on 5/19 and attended by 27 individuals representing employers, TechLauderdale Association, Broward College, Broward County Public Schools, and the Greater Fort Lauderdale Alliance (GFLA).

Mr. Ben Dickenson, Director of Talent Acquisition with Citrix, was the guest speaker and provided details on how the pandemic affected the technology industry. He indicated:

- The pandemic exposed business continuity planning gaps for many organizations.
- There is an increased demand for technology products as remote work, online education, and social distancing became necessary.
- Cybersecurity risks increased as a result of more remote work.
- Global supply chain issues will cause long-term delivery impacts to hardware products.

During the panel discussion, Mr. Dickinson, Cecil Kidd CEO of TechLauderdale, Sanjay Deo, CEO of 24by7 Security, and Michael Goldstein, CEO of LANInfotech, provided their insight on the various obstacles the pandemic has created in the industry and how they pivoted to digital meeting platforms and remote work to conduct business. The panel identified the following short- and long-term effects of COVID-19:

Short-and Long-Term Effects of COVID 19

- Increased workload due to talent shortage.
- Increased turnover due to workers being able to expand their employment opportunities globally and work remotely.
- Lack of in-person interaction putting innovation at risk.
- Need to expand and utilize workforce development.

The panel also identified five (5) skill gaps they were experiencing.

Skill Gaps

- 1. Full stack and cloud platform skills.
- 2. Machine learning skills.
- 3. Artificial Intelligence skills.
- 4. Lack of skilled Cybersecurity Engineers.
- 5. Lack of Data Science Engineers.

Robert Evans, our Business Services Manager for Technology and Construction, used the opportunity to discuss CSBD's work-based training programs and services as a means to address the skills gap. Below is a chart of the strategies developed during the forum.

Strategy	Action Steps
Reduce skill gaps through work-based training.	We are in the process of scheduling individual meetings with employers to identify which of the following programs will suit their needs: 1) On-the-Job Training, 2) Paid Internship, 3) Incumbent Worker Training, and/or 4) Registered Apprenticeship. Employers that we are working with include: 1. 24by7Secururity 2. LANInfotech 3. Citrix 4. Florida Vocational Institute
Reduce skill gaps through ITA training and work-based learning.	Trainings for full stack/cloud platform and cybersecurity engineers are on our training providers list. We are working with the providers to refer their skilled graduates to the employers. We are determining if training programs for artificial intelligence, machine learning, and data science are eligible for our training providers list. If they are not, we will focus OJT and registered apprenticeship for these skill gaps.

Strategy	Action Steps
Inform education partners about the skill gaps learned to allow them to determine what additional steps they can take to address the gaps.	The skill gaps will be shared with our education partners who were not in attendance with a follow-up discussion at our training providers meeting in August. The objective is to use this information to inform curriculum development and increase capacity to address the needed talent pipeline.
Encourage industry employers to post their job orders in Employ Florida and hold recruitment events with CSBD.	We are engaging employers with hiring needs to schedule recruitment events in the CSBD career centers. Graduating students from our education partners will be invited. We will also market the job orders using our social media and create flyers to publicize these employment opportunities.

Construction Industry Forum

The forum was held on 5/26 and attended by 29 individuals representing employers, Associated Builders and Contractors-Florida East Coast Chapter (ABC-FEC), Broward County Government, Broward College, Broward County Public Schools, various trade unions, and the Greater Fort Lauderdale Alliance.

Mr. John Parker, Vice President Operations at Balfour Beatty, was the guest speaker. He shared with the group information on the Broward County Convention Center expansion project, such as:

- The Convention Center is a \$1.1 billion project.
- The project is broken down into four (4) major developments: West expansion, East expansion, Hotel development, and Plaza.
- Estimated completion date is 2024.
- There is a requirement to have 30% County Business Enterprise participation.

The panel discussion with Mr. Parker, Mr. Peter Dyga, President of ABC-FEC, James Armstrong, Vice President of Pirtle Construction, and David Lowrey, Director at Stiles Corporation, provided additional insight on the various obstacles the pandemic has created in the industry and relayed what they did to overcome them, such as implement new protocols to keep workers safe, utilize existing employees to support new projects, and rotate workers and teams in the field to reduce number of people in the field. The panel identified the following short- and long-term effects of COVID-19:

Short-and Long-Term Effects of COVID 19

- Construction companies paused their recruitment and hiring, and utilized their existing workforce due to the uncertainty.
- Increased workload for existing workers due to lack of new hires.
- Shortage of qualified entry-level construction workers.

The panel also identified three (3) skill gaps they were experiencing.

Skill Gaps

- 1. Shortage of entry-level laborers.
- 2. Lack of trained Estimators.
- 3. Shortage of Project Managers.

Robert Evans, our Business Services Manager for Technology and Construction, used the opportunity to discuss CSBD's work-based programs and services as a means to address the skills gap. Below is a chart of the strategies developed during the forum.

Strategy	Action Steps	
Reduce the skill gaps through workbased training.	We are scheduling individual meetings with employers to identify which of the following programs will suit their needs: 1) On-the-Job Training 2) Paid Internships and/or 3) Registered Apprenticeships.	
	We are actively engaged with several of the employers and have started the contract process to bring workbased training programs to them.	
	Some of the employers we are working with are:	
	 Balfour Beatty Power Designs Pirtle Construction Company Stiles Corporation ABC Institute 	
Reduce skill gaps through ITA training and work-based learning.	Training for basic carpentry is on our training providers list. We are working with the providers to refer their skilled graduates to the employers. We are determining if training programs for Estimators and Construction Project Managers are eligible for our	
	training providers list. If they are not, we will focus OJT and registered apprenticeship for these skill gaps.	
Provide employers with skills assessment tools.	We are engaging the employers and providing in-depth presentations on the various tools we use to assess both hard and soft skills (e.g., we are introducing tools such as Metrix Learning, eSkills and CTORQ).	
Inform education partners about the skill gaps learned to allow them to determine what additional steps they	The skill gaps discussed will be shared with our education partners, including those who were not in attendance. We also plan to follow up at our training providers	
can take to address the gaps.	meeting in August to see if the information impacted curriculum development.	

Strategy	Action Steps
Encourage industry employers to post their job orders in Employ Florida and hold recruitment events with CSBD.	We are engaging employers with hiring needs to schedule recruitment events in the CSBD career centers. Graduating students from our education partners will be invited. We will also market the job orders using our social media and create flyers to publicize these employment opportunities.

CSBD will continue to lead as conveners for workforce development to assist employers and job seekers recover, restructure and increase their resilience as our local economy continues to reopen in the post-pandemic environment.

RECOMMENDATION

None. For information purposes only.