



Broward Workforce Development Board
Executive Committee
Monday, August 14, 2023
12:00 Noon – 1:30 p.m.

Zoom Meeting ID: 826 9145 2308
Zoom Password: 706212
Zoom Call in: 1 646 876 9923

CareerSource Broward Boardroom
2890 West Cypress Creek Road, Ft. Lauderdale, FL 33309

This meeting is being held in person. This meeting is also accessible via a Zoom video conference.

PROTOCOL FOR TELEPHONE/ZOOM MEETING

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 prior to the meeting.

MEETING AGENDA

IDENTIFICATION AND INTRODUCTION OF ANY UNIDENTIFIED CALLERS

SELF-INTRODUCTIONS

APPROVAL OF MINUTES

Approval of the Minutes of the 6/12 Executive Committee meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	Minutes of the 6/12 Meeting

Pages 10 – 21

NEW BUSINESS

1. WIOA Work Experience Contract Approval with Broward County

Consideration to approve a WIOA Work Experience (WEX) contract with Broward County for PY 23/24. WEX contracts are non-financial, as CareerSource Broward is the employer of record. Because Board members Tara Williams and Sandy Michael McDonald are employed by Broward County, they will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	None

2. WIOA Work Experience Contract Approval for Broward Health

Consideration to approve a WIOA Work Experience (WEX) contract with Broward Health for PY 23/24. Healthcare is one of our targeted industries. WEX contracts are non-financial, as CareerSource Broward is the employer of record. Because Board member Shane Strum is employed by Broward Health, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	None

3. Selection of Fiscal Year Audit Firm Anthony Brunson, P.A.

Consideration to recommend Anthony Brunson P.A. as our Audit Firm. Their proposal provides for WatsonRice to provide the engagement partner in accordance with state rules which allows for the continuation of the same firm beyond 5 years as long as the engagement partner is rotated. A Request for Quotes (RFQ) was issued on 5/15, with responses due 6/16. We sent the RFQ to 10 firms as well as to the firms which are registered to be noticed when an RFQ is issued, altogether at least 15 firms. We received a quote from Anthony Brunson, P.A. our current Audit Firm, and one (1) no bid from Tri Merge CPA. A Review Committee Meeting was held on 8/7. After hearing from Mr. Brunson and representatives from WatsonRice, the Committee rated and ranked the proposal which had an average score of 93. The Review Committee then voted to recommend the selection of Anthony Brunson, P.A. at a cost of \$34,000, a \$1,000 increase over last year. The contract if approved will allow for 4 one-year renewals subject to governing board approval. As the Audit Committee meets directly prior to the Executive Committee, the recommendations will be presented at the meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	Memo #01 – 23 (LS)

4. Renewal of Taylor Hall Miller Parker, P.A Program Monitoring Contract for PY 23/24

Consideration to renew the contract for program monitoring with Taylor Hall Miller Parker, P.A for the PY 23-24 program year. The cost of the renewal is \$81,000 for 3 visits at \$27,500 per visit. This is the same cost as last year. CSBD is satisfied with the services. This will be the first of up to 4 one-year renewals. As the Audit Committee meets directly prior to the Executive Committee, the recommendations will be presented at the meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	None

5. Renewal of Cherry Bekaert Fiscal Monitoring Contract for PY 23/24

Consideration to renew the contract for fiscal monitoring with Cherry Bekaert, LLP for the PY 23-24 program year. The cost of the renewal is \$73,500 for 3 visits at \$24,500 per visit. This is an increase of \$1,500 over last year. CSBD is satisfied with the services. This will be the first of up to 4 one-year renewals. As the Audit Committee meets directly prior to the Executive Committee, the recommendations will be presented at the meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	None

6. CTS Engines (CTS) Incumbent Worker Training Grant Application

Consideration to award CTS Engines (CTS) an Incumbent Worker Training (IWT) grant in the amount of \$114,939 to train 88 employees to earn job-related certifications. CSBD funds a portion of the tuition and instructor costs. Employees will receive training in areas such as Pratt & Whitney Engine Repair and Maintenance, GE Aerospace Engine Repair and Maintenance, and Advanced Leadership Communication. Pursuant to the WIOA requirements, CTS will contribute 50% to the cost of the training by paying employee wages while they are in training, as well as contributing to the tuition cost. In accordance with governing boards' policy, IWT grant applications of \$50,000 or more and recommended by the rating committee go to the Employer Services and the Executive Committees for consideration, with a report to the Board. Approved at the 8/7 Employer Services Committee meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	Memo #02 – 23 (BR)

Pages 24 - 25

7. Region 22 Targeted Occupations List (TOL) for Program Year 23/24

Consideration to approve changes to our local area's Targeted Occupations List (TOL) for PY 23/24. CareerSource Broward (CSBD) received its preliminary TOL from the State on 5/17, which proposed both adding and removing occupations. As we always do, we researched the preliminary list and compared it to the Board-approved criteria. To get input and feedback on the State's proposed list and gather additional relevant labor market data, CSBD sent the preliminary TOL to local education and business stakeholders, community partners, business leaders, and industry intermediaries and invited them to a publicly noticed meeting held on 7/11. We provided an overview of the PY 23/24 TOL and the governing board's criteria for updating the TOL. Based upon our review and community input, CSBD recommends 1) adding twenty-one (21) new occupations proposed by the State and 2) retaining thirty-four (34) occupations of proposed by the State for removal. Approved at the 8/7 Employer Services Committee meeting.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBITS	Memo #01 – 23 (BR) Exhibit A Region 22 PY 23/24 TOL Exhibit B List of the 34 Occupations to be Retained Exhibit C List of Occupations the State Removed

Pages 26 – 34

8. Addition of New Training Provider Universal Technical Institute

Consideration to approve Universal Technical Institute as an Eligible Training Provider and add 1) Automotive & Diesel Technology II 2) Diesel Technology II 3) Automotive Technology II and 4) Welding Technology II to the Workforce Innovation and Opportunity Act Individual Training Account List. As the committee members are aware pursuant to state law, CSBD cannot exclude programs because of their cost, and pursuant to federal law, CSBD cannot interfere with “customer choice” in the selection of training programs and providers. Staff reviewed the application for completeness and to ensure that Board-mandated criteria are met for the school, training programs, and the related occupational titles. Approved at the 8/1 One Stop Services Committee meeting.

**RECOMM
ACTION
EXHIBITS**

Approval
Motion for Approval
Memo #02 – 23 (OPS)
ITA Course Summary Spreadsheet

Pages 35 - 37

9. Addition of New Courses for Existing Training Provider Hollywood Career Institute

Consideration to add three (3) courses from the current Eligible Training Provider Hollywood Career Institute: 1) Massage Therapy 2) Hemodialysis Tech and 3) Medical Assistant with Basic X-Ray to the WIOA Individual Training Account List. These programs provide opportunities to train for careers in the healthcare industry and are in high demand. CSBD reviewed the applications for completeness and to ensure that Board-mandated criteria have been met for the training programs and related occupational titles. Approved at the 8/1 One Stop Services Committee meeting.

**RECOMM
ACTION
EXHIBITS**

Approval
Motion for Approval
Memo #03-23 (OPS)
ITA Course Summary Spreadsheet

Pages 38 – 40

10. Addition of QLM to Disaster Relief Staffing Vendor List

Consideration to add the QLM staffing company to the vendor list we use during times of disaster to fill Temporary Jobs. QLM was part of a procurement initiated by the state to provide staffing company options for the local workforce areas. We did our own procurement to be able to award contracts to local companies however at this time only EmpHire and ISG (our one-stop staffing company) are still participating. QLM has received excellent reviews from the other local boards, and we would like to add them to our vendor list to expand our outreach to individuals seeking Temporary Jobs as a result of a disaster. The contract amount is dependent upon the burden for individual positions as approved by the state and attached as a schedule to the contract as well as the number of temporary placements. We anticipate this will be over \$50,000.

RECOMM	Approval
ACTION	Motion for Approval
EXHIBIT	None

REPORTS

1. General Fund Balance

At the December 2022 Board meeting, we reported that the General Fund balance was \$901,711. From 11/1/22 through 6/30/23, we realized revenues of \$334,195 and incurred expenditures of \$215,625 for an ending balance including the reserves of \$1,020,281 in the General Fund as of 6/30/23.

ACTION	None
EXHIBIT	Memo #02 – 23 (FS)

Pages 41 - 43

2. Budget vs. Actual Expenditure Report

Each year we budget to spend 100% of our grants. As the governing boards are aware WIOA funds are available for 2 years and also allow for a 20% allocation carry forward each year to avoid a cliff effect due to fluctuations in allocations as we experienced this year. The State extended the period for the expenditure of welfare transition program funds this year through August, and the funds are being invested in the summer program. The strategies we put in place last year are working.

ACTION None
EXHIBIT Memo #01 – 23 (FS)

Pages 44 - 46

3. WIOA Youth Performance for Program Year 22/23

CSBD funds 4 Out-of-School (OSY) and 2 In-School Youth (ISY) programs. The youth receive case management, career pathway planning, occupational skills training, and job readiness preparation. This Youth Performance report provides an update on providers' performance as required under their agreements and in accordance with the Workforce Innovation and Opportunity Act. As reported previously the providers implemented strategic recruitment, engagement, and placement plans and were successful. We congratulate our OSY and ISY providers on their successes during the program year.

ACTION None
EXHIBIT Memo #28-22 (OPS)

Pages 47 – 53

4. Cherry Bekaert LLP Fiscal Monitoring - Report #2 PY 22-23 Issued 5/2023

Cherry Bekaert conducted fiscal monitoring for the period 10/1/22 through 2/28/23. Cherry Bekaert reviewed a total of 921 elements during the review period. There were no findings or observations. Based upon the total elements reviewed, this was a 0% error rate.

ACTION None
EXHIBITS Memo #01-23 (QA)
Chart of Findings

Pages 54 - 55

5. Taylor Hall Miller Parker, PA Program Monitoring - Report #2 PY 22/23-22 Issued 2/2023

THMP conducted program monitoring for the period 11/18/22 through 2/21/23. They reviewed a total of 177 files consisting of 6,029 elements. There were 4 findings and 11 observations. This equates to an error rate of (.06%), or less than 1%. All findings and observations were corrected except where cases were closed, and no further action could be taken.

ACTION	None
EXHIBIT	Memo #02 – 23 (QA)

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6. State Program & Fiscal PY 21/22

The Florida Department of Economic Opportunity (DEO) issued their Financial and Program Monitoring Report on 12/1/22 for the period 4/21 through 3/22. They reviewed a total of 166 program files consisting of 6,502 elements. There were 0 fiscal findings, observations, and technical assistance items. There were 9 program findings and 6 non-compliance issues. The program findings equate to an error rate of .14% less than 1%. All findings and non-compliance issues were corrected except where cases were closed, and no further action could be taken.

ACTION	None
EXHIBIT	Memo #03 – 23 (QA)

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MATTERS FROM THE EXECUTIVE COMMITTEE CHAIR

MATTERS FROM THE EXECUTIVE COMMITTEE

MATTERS FROM THE FLOOR

MATTERS FROM THE PRESIDENT/CEO

ADJOURNMENT

THE NEXT EXECUTIVE COMMITTEE MEETING WILL BE HELD ON OCTOBER 9, 2023.
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Broward Workforce Development Board
Executive Committee
Monday June 12, 2023
12:00 Noon – 1:30 p.m.

Zoom Meeting ID: 842 7835 7601
Zoom Password: 311412
Zoom Call in: +1 646 876 9923

MEETING MINUTES

The Committee was reminded of the conflict-of-interest provisions.

CareerSource Broward Boardroom
2890 West Cypress Creek Road, Ft. Lauderdale, FL 33309

ATTENDEES IN-PERSON: Zac Cassidy, Frank Horkey, Dawn Liberta, Jim Ryan, Rick Shawbell, and Heiko Dobrikow, who chaired the meeting.

ATTENDEES VIA ZOOM: Dr. Ben Chen, Dr. Lisa Knowles, Kevin Kornahrens, and Sandy McDonald.

STAFF: Carol Hylton, Ron Moffett, Rochelle Daniels, Mark Klineciewicz, Kaminnie Kangal, and Michele Baldis.

APPROVAL OF MINUTES

Approval of the Minutes of the 4/10 Executive Committee Meeting

On a motion made by Frank Horkey and seconded by Rick Shawbell, the Executive Committee unanimously approved the minutes of the 4/10 Executive Committee meeting.

NEW BUSINESS

1. Memorandums of Understanding (MOU) Between CSBD and the One-Stop Partners

Considered approval of the new MOUs with our legislative One-Stop partners. Pursuant to the Workforce Innovation and Opportunity Act, the governing boards are required to enter into MOUs for the coordination of services to participants, which may be technological through the one-stop career system. Our new MOU includes CrossWalk for cross referrals and a one-stop strategic plan. The partners must also support the infrastructure and operating costs of the one-stop proportionate to their use, as a part of the MOU. The legislative core partners requiring an MOU are 1) The School Board of Broward County 2) Broward College 3) Vocational Rehabilitation 4) Broward County 5) AARP and 6) OIC of

South Florida. Because Board members Cynthia Gaber, Tara Williams, and Dr. Smiley are employed by one-stop partners, this recommendation must be approved by a 2/3 vote of the Board members present with an established quorum at a Board meeting. Approved at the 6/6 One Stop Services Committee Meeting.

Mr. Shawbell introduced the item, and Ms. Daniels provided an overview of the changes and updates to the MOUs. There was no further discussion.

On a motion made by Rick Shawbell and seconded by Zac Cassidy, the Executive Committee unanimously approved the new Memorandums of Understanding between CSBD and the legislative One-Stop Partners.

2. Summer Youth Employment Program Work Experience Contract with Riverside Hotel

Considered approval of a Summer Youth Employment Program (SYEP) contract with Las Olas Company dba Riverside Hotel for summer 2023. Riverside Hotel has requested thirteen youth. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board member, Mr. Dobrikow is employed by the Riverside Hotel, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow stated his conflict, abstained from the discussion, and requested Vice Chair Mr. Ryan to Chair the Committee for this agenda item. Mr. Ryan introduced and reviewed the item. There was no further discussion.

On a motion made by Frank Horkey and seconded by Zac Cassidy, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with the Las Olas Company dba Riverside Hotel.

3. Summer Youth Employment Program Work Experience Contract with OutPLEX

Considered approval of an SYEP contract with OutPLEX for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board Vice-Chair, Mr. Ryan, is employed by OutPLEX, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow introduced and reviewed the item. Mr. Ryan stated his conflict and abstained from the discussion and voted. There was no further discussion.

On a motion made by Frank Horkey and seconded by Zac Cassidy, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with OutPLEX.

4. **Summer Youth Employment Program Work Experience Contract with Advanced Roofing**

Considered approval of an SYEP contract with Advanced Roofing for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board member Kevin Kornahrens is employed by Advanced Roofing, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Kornahrens stated his conflict, and Ms. Hylton reviewed the item. There was no further discussion.

On a motion made by Dawn Liberta and seconded by Frank Horkey, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with Advanced Roofing.

5. **Summer Youth Employment Program Work Experience Contract with Broward County**

Considered approval of an SYEP contract with Broward County for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board members Sandy McDonald and Tara Williams are employed by Broward County, they will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. McDonald stated his conflict and Ms. Hylton introduced and reviewed the item. There was no further discussion.

On a motion made by Frank Horkey and seconded by Rick Shawbell, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with Broward County.

6. **Summer Youth Employment Program Work Experience Contract with the School Board of Broward County**

Considered approval of an SYEP contract with the School Board of Broward County (SBBC) for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board member Dr. Earlean Smiley is employed by the SBBC, she will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow asked Ms. Hylton to present the item.

Ms. Hylton reviewed the item and recommendation. There was no further discussion.

On a motion made by Rick Shawbell and seconded by Dr. Lisa Knowles, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with the School Board of Broward County.

7. Summer Youth Employment Program Work Experience Contract with Broward Health

Considered approval of a SYEP contract with Broward Health for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board member Shane Strum is employed by Broward Health, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow asked Ms. Hylton to present the item.

Ms. Hylton introduced and reviewed the item. There was no further discussion.

On a motion made by Jim Ryan and seconded by Frank Horkey, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with Broward Health.

8. Summer Youth Employment Program Work Experience Contract with Florida Atlantic University (FAU)

Considered approval of an SYEP contract with FAU for Summer 2023. The SYEP contracts are non-financial; entities agree to serve as host work sites for the youth. CSBD is the youths' employer of record. Because Board member Dr. Stacy Volnick is employed by FAU, she will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow asked Ms. Hylton to present the item.

Ms. Hylton introduced and reviewed the item. There was no further discussion.

On a motion made by Dr. Lisa Knowles and seconded by Dr. Ben Chen, the Executive Committee unanimously approved a Summer Youth Employment Program Work Experience contract with Florida Atlantic University.

9. WIOA Youth Work Experience Contract Approval for Broward Education Foundation

Considered approval of a non-financial Workforce Innovation and Opportunity Act (WIOA) Youth Work Experience contract with the Broward Education Foundation, Inc. (BEF) for Program Year 23/24. Youth assigned to the BEF obtain skills to maintain detailed and accurate inventories of merchandise in a warehouse setting. BEF has been a Work Experience site for the WIOA Youth program since 2017. CSBD and the BEF would like to continue this successful partnership for PY 23/24. Because Board member Mr. Horkey is a member of the BEF Board of Directors, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required.

Mr. Dobrikow introduced and reviewed the item, and Mr. Horkey stated his conflict. There was no further discussion.

On a motion made by Zac Cassidy and seconded by Jim Ryan, the Executive Committee unanimously approved a WIOA Youth Work Experience contract for Broward Education Foundation.

10. WIOA Work Experience Contract Approval for Riverside Hotel

Considered approval of a WIOA Work Experience (WEX) contract with the Las Olas Company, Inc. (LOC), the parent company of the Riverside Hotel for Program Year (PY) 23/24. One of the strategies identified from the recent Hospitality Employer Forum in April was for employers and local education providers to partner with CSBD to place WIOA students that have either graduated or are soon to graduate into paid internship programs. Students will be placed in positions such as front-of-house representatives, guest services associates, dining support, and maintenance engineers. WEX contracts are non-financial, as CareerSource Broward is the employer of record. Because Board Chair Mr. Dobrikow is employed by the LOC, a 2/3 vote of the Board members present at a meeting with an established quorum is required. Approved at the 6/5 Employer Services Committee Meeting.

Mr. Dobrikow stated his conflict, abstained from the discussion, and requested Vice Chair Mr. Ryan to Chair the Committee for this agenda item. Mr. Ryan introduced and reviewed the item. There was no further discussion.

On a motion made by Frank Horkey and seconded by Zac Cassidy, the Executive Committee unanimously approved a WIOA Work Experience contract for Riverside Hotel.

11. The Greater Fort Lauderdale Alliance (GFLA) Economic Sourcebook Ad

Considered approval of an advertisement in the GFLA 2024 Economic Sourcebook to increase employer awareness of our business services. The cost of the ad is \$3,823. GFLA is a partner in the Sourcebook and will realize about \$382 from the ad. Because Board member, Bob Swindell, represents GFLA, he will need to declare a conflict of interest, and a 2/3 vote of the Board members present at a meeting with an established quorum is required. Approved at the 6/5 Employer Services Committee meeting.

Mr. Moffett introduced and reviewed the item. There was no further discussion.

On a motion made by Frank Horkey and seconded by Zac Cassidy, the Executive Committee unanimously approved the Greater Fort Lauderdale Alliance Economic Sourcebook Ad.

12. Transfer of WIOA Dislocated Worker Funds to WIOA Adult Funds

Considered approval of the transfer of up to \$1,000,000 from the WIOA Dislocated Worker funding stream to the WIOA Adult funding stream. WIOA allows local boards 100%

transferability between the two funding streams. We monitor the demand for services and the expenditure rate of the funding streams and request transfer authority as needed. We are seeing more Adult eligible customers than dislocated workers; therefore, this transfer is shifting funds to where they are needed. These funds will be used to provide adult customers with employment services that include 1) occupational skills training 2) work experience and 3) On-the-Job training. Approved at the 5/2 One Stop Services Committee meeting.

Mr. Shawbell introduced and reviewed the item.

Mr. Horkey stated it would be helpful to receive the quarterly expenditure report when funds are moved from one funding stream to another. Ms. Hylton agreed and added that the next time there is a recommendation to transfer funds it will go through the Audit Committee.

On a motion made by Zac Cassidy and seconded by Frank Horkey, the Executive Committee unanimously approved the transfer of up to \$1,000,000 from the WIOA Dislocated Worker funding stream to the WIOA Adult funding stream.

13. PY 23/24 Integrative Staffing Group Contract Renewal

Considered the renewal of the Integrative Staffing Group, Inc. (ISG) contract for PY 23/24. ISG staffs our one-stop career centers. They meet all of our financial and personnel requests and work to keep benefit and insurance costs contained. Their fee remains the same as last year at \$85 per employee per pay period for a total fee of approximately \$181,220 based on our projected staffing level. This is the first of three one-year renewal terms under the current procurement. CSBD is very pleased with their performance. Approved at the 6/6 One Stop Services Committee meeting.

Mr. Shawbell introduced and reviewed the item.

Mr. Horkey inquired if the electronic time-keeping system for payroll was implemented by ISG as presented in the procurement. Rochelle Daniels acknowledged that this was completed.

On a motion made by Rick Shawbell and seconded by Zac Cassidy, the Executive Committee unanimously approved the renewal of the Integrative Staffing Group contract for PY 23/24.

14. Accept WIOA National Dislocated Worker Grant Funds

Considered the acceptance of \$1,000,000 in WIOA National Dislocated Worker Grant funds from the Florida Department of Economic Opportunity. These disaster relief funds provide temporary jobs to assist with humanitarian aid, clean-up, and restoration activities in Broward County due to the recent flooding. Approved at the 6/6 One Stop Services Committee meeting.

Mr. Shawbell stated that these funds are being allocated to CSBD to assist with clean-up due to the significant flooding caused by the unprecedented amount of rainfall.

On a motion made by Rick Shawbell and seconded by Dawn Liberta, the Executive Committee unanimously accepted \$1,000,000 in WIOA National Dislocated Worker Grant funds.

15. One-Stop Operator Contract Renewal

Considered the renewal of the contract with Workforce Guidance Associates, LLC. (WGA) and to increase the roles and responsibilities from part-time to full-time to encompass additional duties. This will include supervising the community liaison, assisting with grant acquisition, and oversight of some dedicated grants in addition to the OSO duties. This will save us money by utilizing WGA already under contract with us. The contract would be increased from \$65,000 up to \$110,000, subject to negotiation, to cover wages and benefits. This is the first of two renewals under the current procurement. The cost will stay the same through the next renewal. Approved at the 6/6 One Stop Services Committee meeting.

Mr. Shawbell stated that this contract is with Nadine Jackson, who has done an outstanding job as One-Stop Operator, and that increasing her role to include grant writing will be helpful.

Mr. Horkey asked if the new cost of this contract will stay the same for the next renewal. Ms. Hylton stated yes that this is correct.

On a motion made by Rick Shawbell and seconded by Dr. Lisa Knowles, the Executive Committee unanimously approved 1) the One-Stop Operator contract renewal and 2) increasing the amount up to \$110,000 to make the position full-time and add additional duties.

16. PY 23/24 Outreach/Marketing Firm Contract Renewals

Considered the renewal of the contracts for 1) Goodman Public Relations for up to \$200,000 and 2) Moore Communications Group for up to \$50,000 for outreach and marketing for Program Year 23/24. The firms will design social media and digital outreach campaigns directing job seekers and employers to CSBD for service. Each contract will be through the end of the program year. This is the first of two (2) renewals under the current procurement. Approved at the 6/5 Employer Services Committee meeting.

Mr. Moffett stated that the services offered by these two companies will be integrated into CSBD's marketing and communication plan.

Mr. Horkey asked if these contracts were for this program year or next. Ms. Hylton clarified that the recommendation is to renew each of these contracts for PY 23/24.

Mr. Ryan inquired if the marketing firms have provided any service to date. Ms. Hylton stated yes they provided promotional materials for the recent Learn Work Win event.

On a motion made by Frank Horkey and seconded by Rick Shawbell, the Executive Committee unanimously approved the renewal of the contracts for 1) Goodman Public Relations for up to \$200,000 and 2) Moore Communications Group for up to \$50,000 for outreach and marketing for Program Year 23/24.

17. PY 23/24 Preliminary Budget

The Program Year (PY) 23/24 Preliminary Budget reflects an overall decrease of 8.6% or (\$1,801,836) in formula funds. The decrease in formula funds is due to an overall reduction in State allocation. The total amount of PY 23/24 formula and carry forward that we project to be available is \$19,264,993 as compared to \$21,066,829 actual in PY 22/23. The budget continues to emphasize investments in customer training and getting the unemployed back to work and it aligns with WIOA and achieving Board strategic initiatives and key business results. CSBD recommends acceptance and approval of the preliminary PY 23/24 budget. Approved at the 6/6 One Stop Services Committee meeting

Mr. Shawbell reviewed the budget and the detail within the categories with the committee.

Mr. Horkey pointed out that our Administration cost is still at 9% per the governing board's directive although we are allowed by law to go up to 10%.

On a motion made by Rick Shawbell and seconded by Zac Cassidy, the Executive Committee unanimously approved the PY 23/24 Preliminary Budget

18. 2023 Planning Session Report

Considered the acceptance of the BWDB annual planning session recommendations on the strategic goals and objectives for PY 23/24. The BWDB held its annual strategic planning session on 4/27. After the opening remarks Board, Council members, and guests formed workgroups to discuss goals and objectives for the upcoming year. The planning session ended with each group reporting on their recommendations. Once approved, the work groups' responses will form the basis for the board's goals and objectives for the upcoming year and will be sent to the committees to deploy.

Mr. Shawbell introduced the item and went over the recommendations with the committee.

Mr. Dobrikow commented on how productive the planning session was and that these recommendations provide a great road map for the coming year.

Ms. Hylton agreed and with respect to regional alignment shared that CareerSource Florida also presented regionalism in meetings she and Dr. Knowles attended during their recent trip to Tallahassee. Ms. Hylton said the regionalism discussion for Miami, and us would not take place until the realignment of the South Florida Region was completed.

Dr. Knowles added that during the meetings in Tallahassee CareerSource Florida signaled that they are looking for ways to encourage regions to work together.

Mr. Horkey suggested holding a meeting with the chairs of Dade and Palm Beach Counties to get ahead of the game.

Mr. Dobrikow agreed with Mr. Horkey that doing round-robin meetings to get acquainted with the regions would be beneficial to help to identify any strategic overlaps. Ms. Hylton added that this recommendation would be helpful in building the required regional plan. Mr. Ryan also agreed that working together would be useful in creating a road map to assist in regional planning.

Mr. Dobrikow pointed out that one of the advantages of regionalism is servicing employers in multiple counties to have a more consistent customer experience. Mr. Dobrikow pointed out that our dashboard could be beneficial across counties as well and suggested Aaron Schmerbeck would be a good source of information.

Ms. Hylton shared that Employer Services is sending a survey to employers that will include questions regarding regional workforce services to get their perspectives. Mr. Dobrikow suggested that CSBD add regionalism as an agenda item at their employer forums.

On a motion made by Frank Horkey and seconded by Dawn Liberta, the Executive Committee unanimously accepted the BWDB annual planning session recommendations on the strategic goals and objectives for PY 23/24.

19. Continued Eligibility for Five (5) Current ITA Providers

Considered approval of current eligible training providers (ETP) 1) APEX Training Center 2) Dentrilogy Academy 3) Dick Robinson Media Code School, LLC dba Connecticut School of Broadcasting 4) Dick Robinson Media Code School, LLC dba Palm Beach Code School 5) Margate Medical Training Center with continuing eligibility for the period 6/22/23 thru 6/22/25 and maintain their currently approved occupational training programs on our ITA list. This is in accordance with WIOA which requires providers to be re-evaluated and approved for continuation on the ETP List after their initial year of eligibility. All five of these providers have met continued eligibility requirements that include licensure, accreditation, issuance of an industry-recognized credential, and reporting to the Florida Education and Training Placement Information Program. CSBD reviewed the applications for completeness and to ensure that CareerSource Florida requirements and Board mandated criteria are met for both schools. Approved at the 5/2 One Stop Services Committee meeting.

Mr. Shawbell introduced and reviewed the item.

Mr. Horkey stated that the contract period should be 7/1-6/30, not 6/22. Ms. Daniels agreed and stated that the contracts do read 7/1-6/30 as they are aligned to the program year.

On a motion made by Rick Shawbell and seconded by Frank Horkey, the Executive Committee unanimously approved continued eligibility for 1) APEX Training Center 2) Dentrilogy Academy 3) Dick Robinson Media Code School, LLC dba Connecticut School of Broadcasting 4) Dick Robinson Media Code School, LLC dba Palm Beach Code School and 5) Margate Medical Training Center.

20. Additional Training Programs for Existing Providers Concorde Career Institute, Dentrilogy Academy, and The Academy of South Florida

Considered approval of the addition of 5 occupational training programs to the Workforce Innovation and Opportunity Act (WIOA) Individual Training Account (ITA) list 1) Concorde Career Institute's Diagnostic Medical Sonography and 2) Cardiovascular Sonography 3) Dentrilogy Academy's Entry Level Dental Front Office Administration and 4) Entry Level Dental Function & Front Office Administration and 5) The Academy of South Florida's Project Manager Professional (Security+, Project+, and PMP). As the committee members are aware pursuant to state law, CSBD cannot exclude programs because of their cost, and pursuant to federal law, CSBD cannot interfere with "customer choice" in the selection of training programs and providers. Staff reviewed the applications for completeness and to ensure that Board mandated criteria are met for the training programs and related occupational titles. Approved at the 5/2 One Stop Services Committee meeting.

Mr. Shawbell reviewed the recommendations with the committee and pointed out that local boards cannot limit customer choice in the selection of programs and providers even though the programs may be expensive.

On a motion made by Rick Shawbell and seconded by Dawn Liberta, the Executive Committee unanimously approved adding 1) Concorde Career Institute's Diagnostic Medical Sonography and 2) Cardiovascular Sonography 3) Dentrilogy Academy's Entry Level Dental Front Office Administration and 4) Entry Level Dental Function & Front Office Administration and 5) The Academy of South Florida's Project Manager Professional (Security+, Project+, and PMP) to the ITA List.

21. CareerSource Broward Marketing and Communications Plan for PY 23/24

Considered approval of CSBD's marketing and communication plan for PY 23/24. Each year, CSBD implements targeted and strategic outreach to job seekers, employers, and community stakeholders, through the press, digital, print, and social media in an effort to increase awareness of CSBD services. This year's strategies include collaborating with BWDB members as brand ambassadors, marketing CSBD's value proposition to employers, enhanced community outreach, targeted marketing to distressed communities and in-school youth, and collaboration with core partners such as industry associations, chambers of commerce, local municipalities, and additional stakeholder groups. Approved at the 6/5 Employer Services Committee meeting.

Francois Leconte introduced and reviewed the strategies for the upcoming year with the committee.

Mr. Moffett explained the plan is updated yearly.

Mr. Ryan requested that Goodman and Moore develop a quarterly or semi-annual report about the progress of the marketing plan, which should include a matrix of achievements of our brand awareness. Ms. Hylton agreed. Mr. Dobrikow expressed that the plan is a robust, thoughtful, and well-balanced approach to marketing.

On a motion made by Frank Horkey and seconded by Zac Cassidy, the Executive Committee unanimously approved CareerSource Broward's marketing and communications plan for PY 23/24.

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

Considered approval of the one-stop center hours of operation and holiday schedule. There are no changes to our hours of operation or our holidays for the upcoming year. The Florida Department of Economic Opportunity requires the governing boards' annual approval of the one-stop center hours of operation and holiday schedule at the start of each program year. The One Stop Centers' hours of operation are M-F, 8:00 a.m. – 5 p.m. Our holidays are aligned with those of Broward County.

Mr. Dobrikow introduced and reviewed the item. There was no further discussion.

On a motion made by Frank Horkey and seconded by Dawn Liberta, the Executive Committee unanimously approved One-Stop Center Hours of Operation and Holiday Schedule for PY 23/24.

REPORTS

1. Presentation at the June Board Meeting

Daniel Harper, Senior Management Analyst Supervisor at the Department of Economic Opportunity, will provide the annual performance presentation.

Mr. Moffett explained that this presentation to the board by DEO is required annually by Florida Statute.

2. Funds From the Community Foundation of Broward to Assist Employees

Immediately following the flooding in Broward, we were informed by the Community Foundation that they were awarded funds to assist employees who serve the public and who were impacted by the flooding. We had requests for assistance from 22 staff, so we submitted our application to the Community Foundation. We received \$22,000 in funds and will be awarding up to \$1,000 per staff person.

Ms. Hylton shared that during a recent event, she was moderating, Dr. Jennifer O'Flannery Anderson, the CEO of the Community Foundation of Broward, mentioned they had funds available for staff who were affected by the flooding. Within a 24-hour window, we submitted our application and received \$22,000 in funding for assistance.

MATTERS FROM THE EXECUTIVE COMMITTEE CHAIR

Mr. Dobrikow expressed that our local economy is getting stronger and shared information from the CSBD dashboard on unemployment, wage, and housing market numbers and how they compared

to six months ago. Mr. Dobrikow reiterated how important the dashboard is for employers to obtain valuable economic information

Mr. Dobrikow commented that the E-verifying of employees may have a negative impact on contractors due to the inability of some workers to provide proper documentation. This may cause these workers to go to other states that are not as rigid adding pressure to our already tight labor market.

MATTERS FROM THE EXECUTIVE COMMITTEE

None

MATTERS FROM THE FLOOR

None

MATTERS FROM THE PRESIDENT/CEO

Ms. Hylton informed the committee that pursuant to Senate Bill 240 each region must have a local educational and industry consortium. The intent is to strengthen opportunities for students to engage in work-based learning. The consortium cannot be comprised of board members. It is still being developed and on track to be implemented in January. We will bring updates as they become available.

Ms. Hylton introduced Kaminnie Kangal as the new Vice President of Finance. Cherry (our auditing company) has provided a temporary Controller to help with the segregation of duties and to ensure a smooth transition so that Kaminnie can assume her responsibilities as the Vice President.

Ms. Hylton also informed the board that SYEP participants started their employable skills orientation today. This is the first of three days of instruction focused on basic soft skills and includes financial literacy and workplace safety information.

Ms. Hylton announced she was the “Member at Large” of the FWDA and now has been selected to hold the position of Secretary, where she will have a leadership role and a “voice at the table”.

Ms. Hylton stated that we are working on expanding the number of board and committee members and recently added Kathleen Cannon, President of the United Way, to the One Stop Services Committee.

Lastly, Ms. Hylton congratulated Mr. Horkey, who will be honored by the Broward Education Foundation for his many years of dedication and service on the board service on June 21st.

ADJOURNMENT 1:08

THE NEXT EXECUTIVE COMMITTEE MEETING WILL BE HELD ON AUGUST 14, 2023.
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Memorandum #01 – 23 (LS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Selection of Audit Firm

Date: August 7, 2023

SUMMARY

Consideration to recommend Anthony Brunson P.A. as our Audit Firm. Their proposal provides for WatsonRice to provide the engagement partner in accordance with state rules which allows for the continuation of the same firm beyond 5 years as long as the engagement partner is rotated. A Request for Quotes (RFQ) was issued on 5/15, with responses due 6/16. We sent the RFQ to 10 firms as well as to the firms which are registered to be noticed when an RFQ is issued, altogether at least 15 firms. We received a quote from Anthony Brunson, P.A. our current Audit Firm, and one (1) no bid from Tri Merge CPA. A Review Committee Meeting was held on 8/7. After hearing from Mr. Brunson and representatives from WatsonRice, the Committee rated and ranked the proposal which had an average score of 93. The Review Committee then voted to recommend the selection of Anthony Brunson, P.A. at a cost of \$34,000, a \$1,000 increase over last year. The contract if approved will allow for 4 one-year renewals subject to governing board approval. As the Audit Committee meets directly prior to the Executive Committee, the recommendations will be presented at the meeting.

BACKGROUND

Our current agreement with our audit firm, Anthony Brunson P.A. expires in September. As our audit costs less than \$250,000 the threshold for competitive proposals, an RFQ was issued on 5/15, with responses due 6/16. The RFQ was posted on the CSBD website and was sent to 10 firms in addition to those firms which are registered to be noticed when an RFQ is issued. Altogether at least 15 firms received a copy of the RFQ. We received one (1) quote from Anthony Brunson, P.A., our current Audit Firm, in Association with WatsonRice. In following up where possible with the firms that received the RFQ we also received one (1) no bid from Tri Merge CPA and one request to submit a quote after the deadline, which was denied.

DISCUSSION

Some of you may recall that the state previously required that we rotate audit firms every five (5) years. However, several years ago they changed the rule, and now only

require a rotation of the engagement partner assigned to the audit. It was explained that this was the reason for the proposal including WatsonRice which will serve as the engagement partner.

On 8/7, a BWDB Review Committee met. The Review Committee included:

- Mr. Zac Cassidy, BWDB Secretary/Treasurer, Chair of the Audit Committee who chaired the Review Committee
- Mr. Heiko Dobrikow, Chair BWDB
- Mr. Frank Horkey, Immediate past BWDB Chair
- Dr. Ben Chen, Co-Chair Strategic Planning Committee

Anthony Brunson PA with WatsonRice was invited to make a presentation, and the Review Committee interviewed them and asked questions. The proposal was rated and then ranked. The average of the scores was 93. The Review Committee voted to recommend the selection of Anthony Brinson, P.A. with WatsonRice serving as the engagement partner.

Mr. Brunson is familiar with CSBD having served as our auditor in the past. Ms. Carshena Allison, Partner, at WatsonRice, who will be the engagement partner has extensive experience providing auditing and monitoring services to nonprofit and government entities. Brunson and WatsonRice are very well regarded by the community, and their work is well known by several of our audit committee and board members. WatsonRice and Anthony Brunson also coordinate to perform the CareerSource South Florida Audit.

Anthony Brunson, P.A. has been our Audit Firm for the past five years, and the governing boards and staff have been satisfied with their work.

The cost of the Audit will be \$34,000, an increase of only \$1,000 over last year. The contract, if approved, would be for the current year with 4 one-year renewals subject to governing board approval.

RECOMMENDATION

Consideration to recommend the selection of Anthony Brunson P.A. with WatsonRice serving as the engagement partner to the CSBD governing boards for approval to perform the CSBD audit at a cost of \$34,000.

Memorandum #02-23 (BR)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: CTS Engines Incumbent Worker Training Grant Application

Date: August 9, 2023

SUMMARY

Consideration to award CTS Engines (CTS) an Incumbent Worker Training (IWT) grant in the amount of \$114,939 to train 88 employees to earn job-related certifications. Pursuant to the Workforce Innovation and Opportunity Act (WIOA) requirements, CTS will contribute 50% to the cost of the training by paying employee wages while they are in training, as well as contributing to the tuition cost. CSBD funds a portion of the tuition and instructor costs. Employees will receive training in areas such as Pratt & Whitney Engine Repair and Maintenance, GE Aerospace Engine Repair and Maintenance, and Advanced Leadership Communication. In accordance with governing boards' policy, IWT grant applications of \$50,000 or more and recommended by the rating committee go to the Employer Services and the Executive Committees for consideration, with a report to the BWDB/CSBD Council of Elected Officials at their next meeting. Approved at the 8/7 Employer Services Committee meeting.

BACKGROUND

IWT is a work-based training option under WIOA to assist companies in remaining competitive by upgrading existing employees' skills. The employer must 1) have employed the majority of employees for at least six (6) months and 2) contribute to the cost of the training based on the number of their employees.

DISCUSSION

CTS is a global leader in jet engine maintenance in Fort Lauderdale and has been in business since 2002. CTS submitted an IWT Application to train 88 employees at a cost of \$114,939. Employees in occupations such as Engine Mechanics, Accounting, Operations Management, and Maintenance will earn occupational certifications in areas including Pratt & Whitney Engine Repair and Maintenance, GE Aerospace Engine Repair and Maintenance, Borescope Inspection, Borescope Blade Bending, Aerospace & Defense Lean Maintenance Repair and Overhaul, Advanced Leadership Communication, and Six Sigma. CTS will contribute 50% to the cost of the training by paying employee wages while they are in training, as well as contributing to the tuition cost. CSBD funds a portion of the tuition and instructor costs. CTS has obtained quotes for the training from Pratt & Whitney, GE Aerospace, Electronics Incorporated, The University of Tennessee, Andrew Carnegie, and Team Analytics, as their course offerings best suit each employee's distinct training needs.

The occupations to be trained are on the Targeted Occupations List for Broward County. Employees will earn an average of \$41.95 an hour upon completion of the training. The training is projected to start in August 2023 and be completed by March 2024. A CSBD rating committee reviewed the application and recommended this IWT grant for funding.

IWT grant applications of \$50,000 or more go to the Employer Services and the Executive Committees for consideration, with a report to the BWDB/CSBD Council of Elected Officials at their next meeting.

RECOMMENDATION

Approve CTS' application for an IWT grant in the amount of \$114,939 to train 88 employees to earn job-related certifications.

Memorandum #01-23 (BR) Revised

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Targeted Occupations List (TOL) for Program Year (PY) 23/24

Date: August 8, 2023

SUMMARY

Consideration to approve changes to our local area's Targeted Occupations List (TOL) for Program Year (PY) 23/24. CareerSource Broward (CSBD) received its preliminary TOL from the State on 5/17, which proposed both adding and removing occupations. As we always do, CSBD researched the preliminary list and compared it to the Board-approved criteria. To get input and feedback on the State's proposed list and gather additional relevant labor market data, CSBD sent the preliminary TOL to local education and business stakeholders, community partners, business leaders, and industry intermediaries and invited them to a publicly noticed meeting held on 7/11. We provided an overview of the PY 23/24 TOL and the governing board's criteria for updating the TOL. Based upon our review and community input, CSBD recommends 1) adding twenty-one (21) new occupations proposed by the State and 2) retaining thirty-four (34) occupations of the forty-nine (49) proposed by the State for removal. Approved at the 8/7 Employer Services Committee meeting.

BACKGROUND

In compliance with federal law, the TOL governs the provision of the Workforce Innovation and Opportunity Act-funded training programs being offered to individuals needing training assistance within the workforce system. Annually, the State evaluates each local area's TOL and sends a preliminary list of the in-demand occupations to the workforce boards. CSBD received its preliminary TOL from the State on 5/17/23, which proposed 1) removing some occupations that were on the list last program year and 2) adding new ones.

Once the TOL is approved by the Board, it becomes final and requires no further ratification by the CareerSource Florida (CSF), Inc. Board of Directors. The CSBD governing boards may approve changes and add new occupations to the TOL throughout the year.

For an occupation to be included on CSBD's TOL for PY 23/24, the occupation must meet all of the following criteria:

1. Have a minimum of twenty-five job openings in Broward County in the past ninety days,
2. Have an entry wage rate equal to or greater than the established Broward County wage rate of \$13.97,
3. Require more than a high school diploma but less than a Master's degree,
4. Require occupational training at a minimum that results in a postsecondary adult vocational training certificate, college credit certificate, applied technology diploma, Associate of Science degree, or Bachelor of Science degree.

DISCUSSION

For the PY 23/24 TOL, the State proposes to 1) **add** 21 new occupational titles and 2) **remove** 49 occupational titles that were on the list last year.¹ In addition, based on the Florida Price Level Index, the CSF Board of Directors proposed an increase in the minimum entry wage rate from \$13.61 per hour to \$13.97 per hour.

To get input and feedback on the State's proposed list and gather additional relevant labor market data, CSBD sent the preliminary TOL to local education and business stakeholders, community partners, business leaders, and industry intermediaries, and invited them to a publicly noticed meeting held on 7/11. We provided an overview of the PY 23/24 TOL and the governing board's criteria for updating the TOL. Based on feedback we received during the meeting and our own research using tools such as Jobs EQ, ONET, and Employ Florida, supporting evidence was established to **retain** 34 occupational titles that were proposed by the State for removal.² Table 2 is a list of the 34 occupations to be retained on the TOL for PY 23/24.

The State proposed **adding** 21 occupations to this year's list that were not on the TOL last year. CSBD recommends that they be added since the TOL presents local labor market information that may be useful to others for research. Prior to adding any new training provider to the Eligible Training Provider (ETP) List or occupational training course to the Individual Training Account (ITA) list, CSBD re-confirms that occupations meet all Board criteria. Table 1 is a list of the 21 occupations proposed by the State that CSBD is recommending be added.

Table 1: The Addition of 21 New Occupations Proposed by the State

1. Airline Pilots, Copilots, and Flight Engineers	12. Glaziers
2. Architectural and Civil Drafters	13. Interpreters and Translators
3. Biological Technicians	14. Mechanical Engineers
4. Bus Drivers, Transit and Intercity	15. Mobile Heavy Equipment Mechanics, Except Engines
5. Computer Network Architects	16. Occupational Therapy Assistants
6. Drywall and Ceiling Tile Installers	17. Roofers
7. Education Administrators, Postsecondary	18. Sheet Metal Workers
8. Electrical Engineers	19. Special Education Teachers, Kindergarten and Elementary School
9. Electronics Engineers, Except Computer	20. Surveying and Mapping Technicians
10. Engineers, All Other	21. Telecommunications Line Installers and Repairers
11. Farmers, Ranchers, and Other Agricultural Managers	

¹ Of the 49 occupational titles the State was to remove we are recommending to retain 34.

² Jobs EQ is a software tool that provides local demographic, industry, occupation, and employment data.

Table 2: The Retention of 34 Occupations

1. Automotive Body and Related Repairers	18. Legal Secretaries and Administrative Assistants
2. Avionics Technicians	19. Lodging Managers
3. Business Operations Specialists, All Other	20. Maintenance & Repair Workers, General
4. Buyers and Purchasing Agents	21. Managers, All Other
5. Captains, Mates, and Pilots of Water Vessels	22. Massage Therapists
6. Career/Technical Education Teachers, Postsecondary	23. Medical Records Specialists
7. Chief Executives	24. Paramedics
8. Clinical Laboratory Technologists and Technicians	25. Personal Service Managers, All Other
9. Computer Occupations, All Other	26. Project Management Specialists
10. Database Architects	27. Psychiatric Technicians
11. Emergency Medical Technician	28. Purchasing Agents, Except Wholesale, Retail & Farm Products
12. Executive Secretaries and Executive Administrative Assistants	29. Real Estate Sales Agents
13. Financial and Investment Analysts	30. Software Developers
14. First-Line Supervisors of Food Preparation and Serving Workers	31. Software Quality Assurance Analysts and Testers
15. First-Line Supervisors of Personal Service Workers	32. Teachers and Instructors, All Other
16. Health Technologists and Technicians, All Other	33. Veterinary Technologists and Technicians
17. Interior Designers	34. Web Developers

Table 3 is a list of 15 occupations the State removed due to insufficient entry wage or demand.³

Table 3: The 15 Occupations removed by the State

1. Social and Human Services Assistants	9. Title Examiners, Abstractors, and Searchers
2. Tutors	10. Medical Dosimetrists
3. Opticians/Dispensing	11. First-Line Supervisors of Entertainment & Recreation Workers, Except Gambling Services
4. Administrative Services and Facilities Managers	12. Real Estate Brokers
5. Entertainment and Recreation Managers, Except Gambling	13. Loan Interviewers and Clerks
6. Financial Risk Specialists	14. Human Resources Assistants, Except Payroll and Timekeeping
7. Financial Specialists, All Others	15. Computer, Automated Teller, and Office Machine Repairers
8. Web and Digital Interface Designers	

³ As shown in Table 2 CSBD found supporting evidence to retain 34 occupations.

Exhibit A is the PY 23/24 TOL per the State that includes the addition of 21 new occupations. Exhibit B is the list of the 34 occupations CSBD is recommending to be retained. Exhibit C is the list of the 15 occupations removed by the State.

The final TOL will be posted to our website upon Board approval.

RECOMMENDATION

Approve the PY 23/24 TOL with the following changes from the preliminary TOL provided by the State 1) add 21 new occupations and 2) retain 34 occupations proposed by the State for removal.

BR #01-23 Exhibit A

2023-24 Regional Demand Occupations List

Sorted by Occupational Title

Workforce Development Area 22 - Broward County

Selection Criteria:

- 1 FLDOE Training Code 3 (PSAV Certificate), 4 (Community College Credit/Degree), or 5 (Bachelor's Degree)
- 2 80 annual openings and positive growth
- 3 Mean Wage of \$17.18/hour and Entry Wage of \$13.97/hour
- 4 High Skill/High Wage (HSHW) Occupations:
Mean Wage of \$26.92/hour and Entry Wage of \$17.18/hour

SOC Code* HSHW**			Regional			Statewide				FLDOE Training Code	In EFI Targeted Industry?	Qualifying Level***	
			Annual % Growth	Annual Openings	2021 Hourly Wage		Annual % Growth	Annual Openings	2021 Hourly Wage				
Occupation Title*					Mean	Entry			Mean	Entry			
132011	HSHW	Accountants and Auditors	1.18	998	37.74	23.21	1.43	9327	36.69	21.86	5	Yes	R
493011	HSHW	Aircraft Mechanics and Service Technicians	0.37	121	N/A	N/A	1.28	1424	31.28	19.87	3	Yes	S
532011	HSHW	Airline Pilots, Copilots, and Flight Engineers	N/A	N/A	N/A	N/A	1.19	665	111.83	63.62	4	Yes	S
173011	HSHW	Architectural and Civil Drafters	-0.05	48	N/A	N/A	1.36	831	26.84	18.87	3	Yes	S
119041	HSHW	Architectural and Engineering Managers	1.20	42	68.15	43.57	1.76	723	70.33	46.08	5	Yes	S
274011		Audio and Video Technicians	1.77	85	N/A	N/A	2.49	1013	24.05	14.84	4	No	S
493023		Automotive Service Technicians and Mechanics	0.35	521	23.06	13.66	0.33	5289	21.79	13.91	3	No	S
194021		Biological Technicians	0.87	20	N/A	N/A	1.89	566	20.84	14.82	4	Yes	S
433031		Bookkeeping, Accounting, and Auditing Clerks	0.04	1,117	20.59	13.44	0.22	12179	20.4	13.86	4	Yes	S
493031		Bus and Truck Mechanics and Diesel Engine Specialists	1.36	107	26.49	19.40	1.26	1594	25.08	18.05	3	No	R
533052		Bus Drivers, Transit and Intercity	N/A	N/A	N/A	N/A	0.73	1327	20.76	14.27	3	No	S
251011	HSHW	Business Teachers, Postsecondary	1.69	136	N/A	N/A	2.23	525	45.7	23.69	5	No	S
292031		Cardiovascular Technologists and Technicians	0.93	26	N/A	N/A	1.55	517	24.33	14.2	3	No	S
435011		Cargo and Freight Agents	1.58	152	N/A	N/A	1.39	1118	22.67	15.36	3	Yes	S
472031		Carpenters	0.29	674	22.01	16.67	0.99	6762	21.14	15.6	3	No	R
472051		Cement Masons and Concrete Finishers	0.71	111	N/A	N/A	1.41	1658	19.2	14.09	3	No	S
351011		Chefs and Head Cooks	1.87	165	28.64	15.70	1.48	1972	28.29	16.3	3	No	R
172051	HSHW	Civil Engineers	1.63	102	N/A	N/A	1.67	1642	45.22	27.52	5	Yes	S
131031	HSHW	Claims Adjusters, Examiners, and Investigators	-0.16	252	N/A	N/A	0.10	2094	31.45	20.39	3	Yes	S
212011		Clergy	0.88	145	28.04	16.63	1.03	1825	24.58	15.27	5	No	R
292010		Clinical Laboratory Technologists and Technicians	0.87	205	25.62	15.58	1.40	1891	25.13	15.26	4	No	R
532012	HSHW	Commercial Pilots	0.14	199	N/A	N/A	1.34	746	52.69	27.66	3	Yes	S
211099		Community and Social Service Specialists, All Other	2.11	63	24.68	16.52	1.56	546	21.18	15.25	5	No	S
131141	HSHW	Compensation, Benefits, and Job Analysis Specialists	1.49	58	N/A	N/A	1.47	554	28.75	19.06	4	Yes	S
131041	HSHW	Compliance Officers	1.11	281	32.87	18.94	1.15	2499	31.63	18.12	3	Yes	R
113021	HSHW	Computer and Information Systems Managers	1.23	252	N/A	N/A	1.82	2248	70.34	44.67	5	Yes	S
151241	HSHW	Computer Network Architects	0.91	50	N/A	N/A	1.53	685	53.64	32.8	5	Yes	S
151231	HSHW	Computer Network Support Specialists	1.05	96	33.59	21.87	1.44	887	32.57	21.01	3	Yes	R
151211	HSHW	Computer Systems Analysts	0.84	231	44.37	28.53	1.45	2943	44.58	27.96	4	Yes	R
151232		Computer User Support Specialists	1.46	545	24.63	15.63	1.73	4532	24.95	15.75	3	Yes	R
474011	HSHW	Construction and Building Inspectors	0.04	128	31.58	19.23	1.06	1468	30.12	19.06	3	Yes	R
119021	HSHW	Construction Managers	0.81	322	53.93	31.16	1.64	3377	49.89	28.74	4	No	R
131051	HSHW	Cost Estimators	0.14	115	N/A	N/A	0.90	1377	31.18	19.13	4	No	S
319091		Dental Assistants	1.59	302	18.99	15.31	1.87	3421	19.63	15.87	3	No	R
291292	HSHW	Dental Hygienists	1.73	129	35.45	29.97	1.87	1153	35.18	29.19	4	No	R
292032	HSHW	Diagnostic Medical Sonographers	1.97	48	N/A	N/A	2.45	614	34.27	26.98	3	No	S
472081		Drywall and Ceiling Tile Installers	N/A	N/A	N/A	N/A	1.10	788	19.61	14	3	No	S
119032	HSHW	Education Administrators, Kindergarten through Secondary	2.05	101	45.52	32.32	N/A	N/A	N/A	N/A	5	No	R
119033	HSHW	Education Administrators, Postsecondary	-0.66	57	N/A	N/A	1.42	1111	46.05	33.25	5	No	S
173023	HSHW	Electrical and Electronic Engineering Technologists and Technicians	0.89	34	N/A	N/A	1.42	782	29.33	19.14	4	Yes	S
172071	HSHW	Electrical Engineers	0.40	26	N/A	N/A	1.97	656	45.32	28.99	5	Yes	S
472111		Electricians	0.35	460	23.91	17.58	1.51	5999	23.6	16.86	3	No	R

172072	HSHW	Electronics Engineers, Except Computer	0.95	40	N/A	N/A	1.69	519	50.3	35.33	5	Yes	S
252021	HSHW	Elementary School Teachers, Except Special Education	2.09	655	30.65	21.95	1.21	6265	29.57	21.08	5	No	R
172199	HSHW	Engineers, All Other	0.68	32	N/A	N/A	1.32	693	49.99	26.74	5	Yes	S
119013	HSHW	Farmers, Ranchers, and Other Agricultural Managers	N/A	N/A	N/A	N/A	0.10	5002	44.56	22.53	4	No	S
113031	HSHW	Financial Managers	1.87	330	69.52	38.44	2.28	3661	66.29	34.98	5	Yes	R
332011	HSHW	Firefighters	0.62	153	30.28	21.92	0.63	1626	25.71	16.59	3	No	R
471011	HSHW	First-Line Supervisors of Construction Trades and Extraction Workers	0.61	465	33.09	22.53	1.35	6420	31.74	21.04	4	No	R
371011		First-Line Supervisors of Housekeeping and Janitorial Workers	0.80	155	19.76	13.92	1.83	2885	19.74	13.88	3	No	S
371012		First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	0.44	117	26.35	17.29	1.74	1982	23.81	16.38	3	No	R
491011	HSHW	First-Line Supervisors of Mechanics, Installers, and Repairers	0.90	280	32.03	21.23	1.22	3401	31.26	20.64	3	No	R
411012	HSHW	First-Line Supervisors of Non-Retail Sales Workers	-0.18	288	44.29	23.85	0.04	2634	43.82	23.51	4	Yes	S
431011	HSHW	First-Line Supervisors of Office and Administrative Support Workers	0.29	1,109	30.99	19.70	0.48	11899	29.35	18.86	4	Yes	R
331012	HSHW	First-Line Supervisors of Police and Detectives	0.64	94	54.81	41.28	0.56	636	45.53	30.57	4	No	R
511011	HSHW	First-Line Supervisors of Production and Operating Workers	1.09	241	30.14	19.29	1.09	2870	29.79	18.77	3	Yes	R
411011		First-Line Supervisors of Retail Sales Workers	-0.29	861	22.67	14.34	0.02	10845	22.39	14.19	3	No	S
531047		First-Line Supervisors of Transportation and Material Moving Workers, Except Aircraft Cargo Handling Supervisors	0.58	386	26.72	17.55	1.46	4152	26.27	16.95	3	Yes	R
119051	HSHW	Food Service Managers	0.98	215	39.12	18.06	0.59	3684	35.82	19.55	4	No	R
111021	HSHW	General and Operations Managers	1.12	1,538	49.21	22.34	1.36	15477	47.51	21.26	4	Yes	R
472121		Glaziers	2.04	59	N/A	N/A	2.24	869	20.39	15.29	3	No	S
271024		Graphic Designers	0.61	134	N/A	N/A	0.70	1716	25.83	16.87	4	Yes	S
499021		Heating, Air Conditioning, and Refrigeration Mechanics and Installers	0.18	454	22.23	14.80	1.16	4213	22.52	15.77	3	No	R
533032		Heavy and Tractor-Trailer Truck Drivers	1.34	816	21.63	15.21	0.98	13002	21.62	14.92	3	Yes	R
113121	HSHW	Human Resources Managers	1.14	86	58.47	36.63	1.35	766	56.98	34.83	5	Yes	R
131071	HSHW	Human Resources Specialists	0.99	616	35.99	19.69	1.35	5002	31.42	18.49	5	Yes	R
172112	HSHW	Industrial Engineers	1.26	61	N/A	N/A	2.36	1025	44.86	30.14	5	Yes	S
499041		Industrial Machinery Mechanics	2.18	120	26.23	19.10	2.15	1828	26.07	18.12	3	Yes	R
537051		Industrial Truck and Tractor Operators	0.47	285	19.47	14.25	1.83	4759	19.3	14.88	3	Yes	R
151212	HSHW	Information Security Analysts	3.80	82	N/A	N/A	4.14	1047	49.44	30.8	3	Yes	S
413021		Insurance Sales Agents	-0.04	504	N/A	N/A	1.06	5238	28.19	14.47	3	Yes	S
273091		Interpreters and Translators	3.08	57	N/A	N/A	3.15	522	24.63	13.67	4	Yes	S
252012	HSHW	Kindergarten Teachers, Except Special Education	2.10	105	N/A	N/A	1.20	979	28.39	19.71	5	No	S
292061		Licensed Practical and Licensed Vocational Nurses	1.42	319	23.78	19.11	1.57	3969	23.01	18.96	3	No	R
132072	HSHW	Loan Officers	-0.53	78	35.95	15.75	0.19	1467	35.86	17.27	4	Yes	S
131081	HSHW	Logisticians	4.45	129	33.19	21.04	1.47	932	33.32	20	5	Yes	R
514041		Machinists	1.01	104	N/A	N/A	1.36	1125	22.14	15.46	3	Yes	S
131111	HSHW	Management Analysts	1.79	791	43.44	22.89	1.85	8036	41.63	22.17	5	Yes	R
131161		Market Research Analysts and Marketing Specialists	2.37	733	33.57	18.87	2.73	6860	32.99	18.28	5	Yes	R
112021	HSHW	Marketing Managers	1.18	165	N/A	N/A	1.54	1463	72.48	36.91	5	Yes	S
172141	HSHW	Mechanical Engineers	1.36	42	41.18	25.11	1.75	711	43.3	27.76	5	Yes	S
119111	HSHW	Medical and Health Services Managers	3.64	331	52.56	29.62	N/A	N/A	N/A	N/A	5	No	R
319092		Medical Assistants	3.12	931	18.08	14.16	2.34	9263	17.06	13.72	3	No	R
499062		Medical Equipment Repairers	1.21	62	N/A	N/A	1.49	569	24.55	15.53	3	Yes	S
436013		Medical Secretaries and Administrative Assistants	1.63	450	18.12	14.01	1.50	5104	17.21	13.53	3	No	R
131121		Meeting, Convention, and Event Planners	1.38	92	N/A	N/A	1.80	1150	25.39	15.27	4	Yes	S
252022	HSHW	Middle School Teachers, Except Special and Career/Technical Education	2.02	252	29.48	20.59	1.22	2908	28.98	20.31	5	No	R
493042		Mobile Heavy Equipment Mechanics, Except Engines	1.18	61	24.09	16.84	1.10	937	24.11	17.19	3	Yes	S
493051		Motorboat Mechanics and Service Technicians	1.92	175	N/A	N/A	1.12	507	24.18	15.78	3	Yes	S

		Network and Computer Systems											
151244	HSHW	Administrators	0.84	132	40.39	25.27	1.34	1592	39.34	24.6	4	Yes	R
312011	HSHW	Occupational Therapy Assistants	N/A	N/A	N/A	N/A	3.36	588	31.43	24.74	4	No	S
472073		Operating Engineers and Other Construction Equipment Operators	0.36	184	23.51	16.81	0.96	2869	21.27	15.72	3	No	R
472141		Painters, Construction and Maintenance	0.35	224	N/A	N/A	0.95	3163	18.62	14.28	3	No	S
232011	HSHW	Paralegals and Legal Assistants	1.93	504	28.18	19.25	1.80	4961	25.93	17.89	3	Yes	R
132052	HSHW	Personal Financial Advisors	0.49	135	N/A	N/A	0.57	1939	50.42	20.04	5	No	S
372021		Pest Control Workers	N/A	N/A	N/A	N/A	1.36	1557	18.6	13.66	3	No	S
292052		Pharmacy Technicians	0.75	258	18.07	14.70	0.96	2629	17.33	13.75	3	No	R
319097		Phlebotomists	1.69	125	N/A	N/A	2.29	1214	17.17	13.78	3	No	S
312021	HSHW	Physical Therapist Assistants	3.42	103	N/A	N/A	3.39	1330	31.22	22.28	4	No	S
291071	HSHW	Physician Assistants	5.11	143	N/A	N/A	3.99	837	50.39	28.97	5	No	S
472152		Plumbers, Pipefitters, and Steamfitters	-0.10	275	24.03	17.94	1.10	3524	23.13	16.6	3	No	S
333051	HSHW	Police and Sheriff/Es Patrol Officers	0.65	364	37.17	27.61	0.60	3358	31.88	22.46	3	No	R
251199	HSHW	Postsecondary Teachers, All Other	N/A	N/A	N/A	N/A	1.47	2167	33.81	19.75	4	No	S
272012	HSHW	Producers and Directors	1.63	89	N/A	N/A	1.81	774	34.98	18.61	5	Yes	S
119141	HSHW	Property, Real Estate, and Community Association Managers	0.92	450	32.03	17.70	1.09	3497	32.01	17.33	4	No	R
273031	HSHW	Public Relations Specialists	1.15	119	32.70	17.50	1.40	1596	30.57	17.13	5	Yes	R
292034	HSHW	Radiologic Technologists and Technicians	1.05	112	29.80	22.02	1.39	1359	28.64	20.96	3	No	R
291141	HSHW	Registered Nurses	1.09	1,093	35.84	26.81	1.53	13568	34.62	26.5	4	No	R
291126	HSHW	Respiratory Therapists	2.32	60	N/A	N/A	3.03	742	29.37	24.46	4	No	S
472181		Roofers	2.66	343	N/A	N/A	2.35	3616	19.63	14.17	3	No	S
112022	HSHW	Sales Managers	0.78	290	N/A	N/A	1.37	2575	61.04	30.43	5	Yes	S
414012		Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	0.95	1,197	32.46	16.14	0.83	9474	32.58	16.02	3	Yes	R
414011	HSHW	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	1.19	372	N/A	N/A	1.05	2619	43.77	21.11	3	Yes	S
252031	HSHW	Secondary School Teachers, Except Special and Career/Technical Education	2.05	360	31.11	22.21	1.22	3890	30.83	21.75	5	No	R
413031	HSHW	Securities, Commodities, and Financial Services Sales Agents	-0.42	260	36.28	19.06	0.49	3393	37.75	18.8	5	No	S
492098		Security and Fire Alarm Systems Installers	1.96	68	N/A	N/A	2.00	687	22.9	16.23	3	No	S
472211		Sheet Metal Workers	0.56	57	N/A	N/A	1.43	1016	21.68	15.24	3	Yes	S
252052	HSHW	Special Education Teachers, Kindergarten and Elementary School	2.69	9	N/A	N/A	1.22	615	30.63	19.78	5	No	S
211018		Substance Abuse, Behavioral Disorder, and Mental Health Counselors	2.70	236	24.45	16.65	2.37	2200	24.04	15.52	5	No	R
292055		Surgical Technologists	1.30	51	N/A	N/A	1.63	755	23.1	17.6	3	No	S
173031		Surveying and Mapping Technicians	0.95	30	21.21	15.55	1.65	717	20.52	14.73	3	Yes	S
492022		Telecommunications Equipment Installers and Repairers, Except Line Installers	1.09	235	N/A	N/A	1.41	2320	25.27	16.05	3	No	S
499052		Telecommunications Line Installers and Repairers	0.83	68	N/A	N/A	1.31	814	22.57	16.56	3	No	S
472044		Tile and Stone Setters	0.90	61	N/A	N/A	2.06	777	20.23	14.53	3	No	S
131151		Training and Development Specialists	1.44	279	29.25	17.04	1.58	2558	29.87	17.25	5	Yes	R
339093		Transportation Security Screeners	0.99	93	20.94	17.65	0.89	631	20.41	16.68	3	No	R
113071	HSHW	Transportation, Storage, and Distribution Managers	1.13	79	49.40	28.45	1.45	757	49.75	28.08	4	Yes	S
514121		Welders, Cutters, Solderers, and Brazers	0.49	142	21.68	15.99	1.35	1917	21.31	15.86	3	Yes	R

*SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

**HSHW = High Skill/High Wage.

***Qualifying Level:

R = Meets regional wage and openings criteria based on state Labor Market Statistics employer survey data. Regional data are shown.

S = Meets statewide wage and openings criteria based on state Labor Market Statistics employer survey data. Statewide data are shown.

NR = Not releasable.

EFI - Enterprise Florida, Inc.

BR 01-23 Exhibit B

List of 34 Occupations CSBD is Recommending to be Retained

Sorted by Occupational Title

Workforce Development Area 22 – Broward County

	SOC Code*	HSHW**	Occupational Title	Entry Wage
1.	493021		Automotive Body and Related Repairers	\$15.24
2.	492091		Avionics Technicians	\$18.45
3.	131199	HSHW	Business Operations Specialists, All Other	\$17.98
4.	131020	HSHW	Buyers and Purchasing Agents	\$17.97
5.	535021		Captains, Mates, and Pilots of Water Vessels	\$20.73
6.	251194	HSHW	Career/Technical Education Teachers, Postsecondary	\$18.06
7.	111011	HSHW	Chief Executives	\$33.77
8.	292010		Clinical Laboratory Technologist and Technicians	\$15.42
9.	151299	HSHW	Computer Occupations, All Other	\$14.47
10.	151243	HSHW	Database Architects	\$39.46
11.	292042		Emergency Medical Technician	\$13.99
12.	436011	HSHW	Executive Secretaries and Executive Administrative Assistants	\$18.02
13.	132051	HSHW	Financial and Investment Analysts	\$25.50
14.	351012		First-Line Supervisors of Food Preparation and Serving Workers	\$14.20
15.	391022		First-Line Supervisors of Personal Service Workers	\$14.35
16.	292099		Health Technologists and Technicians, All Other	\$15.30
17.	271025	HSHW	Interior Designers	\$17.22
18.	436012		Legal Secretaries and Administrative Assistants	\$14.65
19.	119081	HSHW	Lodging Managers	\$24.20
20.	499071		Maintenance & Repair Workers, General	\$14.68
21.	119199	HSHW	Managers, All Other	\$30.89
22.	319011		Massage Therapists	\$13.97
23.	292072		Medical Records Specialists	\$15.06
24.	292043	HSHW	Paramedics	\$18.59
25.	119179	HSHW	Personal Service Managers, All Other	\$23.64
26.	131082	HSHW	Project Management Specialists	\$24.97
27.	292053		Psychiatric Technicians	\$14.61
28.	131023	HSHW	Purchasing Agents, Except Wholesale, Retail & Farm Products	\$17.97
29.	419022		Real Estate Sales Agents	\$13.74
30.	151252	HSHW	Software Developers	\$24.71
31.	151253	HSHW	Software Quality Assurance Analysts and Testers	\$24.52
32.	253099		Teachers and Instructors, All Other	\$18.38
33.	292056		Veterinary Technologists and Technicians	\$14.49
34.	151254	HSHW	Web Developers	\$26.12

* SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

**HSHW = High Skill/High Wage Occupation paying \$17.18 or more per hour

BR 01-23 Exhibit C

List of 15 occupations proposed for removal by Florida Commerce due to an entry wage of less than \$13.97 or an insufficient demand of less than 25 Broward County job openings

Sorted by Occupational Title

Workforce Development Area 22 – Broward County

	SOC Code*	Occupational Title	Reason For Removal
1.	211093	Social and Human Services Assistants	Insufficient Entry Wage
2.	253041	Tutors	Insufficient Entry Wage
3.	292081	Opticians/Dispensing	Insufficient Entry Wage
4.	113010	Administrative Services and Facilities Managers	Insufficient Demand
5.	119072	Entertainment and Recreation Managers, Except Gambling	Insufficient Demand
6.	132054	Financial Risk Specialists	Insufficient Demand
7.	132099	Financial Specialists, All Other	Insufficient Demand
8.	151255	Web and Digital Interface Designers	Insufficient Demand
9.	232093	Title Examiners, Abstractors, and Searchers	Insufficient Demand
10.	292036	Medical Dosimetrists	Insufficient Demand
11.	391014	First-Line Supervisors of Entertainment and Recreation Workers, Except Gambling Services	Insufficient Demand
12.	419021	Real Estate Brokers	Insufficient Demand
13.	434131	Loan Interviewers and Clerks	Insufficient Demand
14.	434161	Human Resources Assistants, Except Payroll and Timekeeping	Insufficient Demand
15.	492011	Computer, Automated Teller, and Office Machine Repairers	Insufficient Demand

* SOC Code and Occupational Title refer to Standard Occupational Classification codes and titles.

Memorandum #02-23 (OPS) Revised

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Add New Eligible Training Provider and Courses for Universal Technical Institute

Date: August 4, 2023

SUMMARY

Consideration to approve Universal Technical Institute as an Eligible Training Provider and add 1) Automotive & Diesel Technology II 2) Diesel Technology II 3) Automotive Technology II and 4) Welding Technology II to the WIOA Individual Training Account List (ITA). Per state law, CSBD cannot take cost into consideration when reviewing the programs. While the law requires that participants have customer choice in the selection of training programs, CSBD success coaches advise participants regarding all alternatives as a component of customer choice. Staff reviewed the application for completeness and to ensure that Board-mandated criteria are met for the school, training programs and the related occupational titles. Approved at the 8/1 One Stop Services Committee meeting.

BACKGROUND

WIOA requires classroom or online training to be provided through ITAs at schools and for courses approved by the local workforce board. The ITA can only be used at schools on the State list of Eligible Training Providers (ETP) and for programs in-demand occupations appearing on the Targeted Occupations List (TOL). Two critical criteria over which CSBD has no control are:

1. The inclusion of programs that are expensive when compared to the same courses which may be available at public institutions. This is because the Florida State Statutes governing WIOA at 445.007 (6) state: that a "local workforce development board may not restrict the choice of training providers based upon cost, location, or historical training arrangements."
2. An individual has the ability to select a course of study even though they may incur debt because WIOA states we must give participants the full list of available courses along with cost and performance information.

While the law requires that participants have customer choice in the selection of training programs, CSBD success coaches advise participants regarding all alternatives as a component of customer choice. Additionally, all occupational training must meet the Broward Workforce Development Board's established minimum evaluation criteria. This includes but is not limited to licensure, accreditation, issuance of an industry-recognized credential, and reporting to the Florida Education and Training Placement Information Program (FETPIP). All of our current eligible training providers meet these criteria.

DISCUSSION

Universal Technical Institute has been operating in Miramar since March 2021 and provides training in the automotive, mechanical, and welding industries. They are licensed by the Commission on Independent Education and accredited by the Accrediting Commission of Career Schools and Colleges, an entity recognized by the US Dept of Education. The provider does not currently submit reports to FETPIP but understands and commits to submitting FETPIP data going forward.

The courses submitted will prepare participants for employment in the following demand occupations as shown in the chart below.

Eligible Training Provider and Courses to Be Added to the WIOA ITA List

Training Provider	Occupational Training Program	Occupation	Entry Wage
Universal Technical Institute	Automotive & Diesel Technology II	Bus and Truck Mechanics and Diesel Engine Specialists	\$18.05
	Diesel Technology II		
	Automotive Technology II	Automotive Service Technicians and Mechanics	\$18.77
	Welding Technology II	Welders, Cutters, Solderers, and Brazers	\$15.15

Staff has conducted an on-site review of the school. A cross-functional CSBD review committee comprised of staff from Operations, Quality Assurance, and our appropriate intermediary reviewed the application and programs. The committee has determined that all Board-mandated criteria have been met for the school, training programs, and related occupational titles. This includes but is not limited to 1) licensure 2) accreditation 3) issuance of an industry-recognized credential 4) 25 or more job openings in Broward County and 5) reporting to FETPIP.

As a new training provider, Universal Technical Institute will be under initial eligibility status with CSBD, and we will limit enrollment of customers to 10 in each of the training programs until performance can be established for our customers.

RECOMMENDATIONS

Approve Universal Technical Institute as an eligible training provider and add 1) Automotive & Diesel Technology II 2) Diesel Technology II 3) Automotive Technology II and 4) Welding Technology II to the Workforce Innovation and Opportunity Act Individual Training Account List.

ITA Course Summary Spreadsheet Attachment to Memo #02-23 (OPS)

School Name / Location	License / State Agency Approval	DOE Accreditation	Course Title	Type of Credential Offered	Program Length	Clock Hours	Entry Wage	Course Offering (Virtual/ Classroom/ Blended)	Class Size (Max)	Prerequisites	Tuition and Fees	Other Costs (Books, Uniforms, Supplies, Cert./Lic. Exams)	Program Total Costs
Universal Technical Institute	YES	YES	Welding Technology II	Diploma	36 weeks	900	\$15.15	Blended	52	HS Diploma / Equivalent, Background Check	\$22,695.00	\$350.00	\$22,695.00
	YES	YES	Diesel Technology II	Diploma	45 weeks	1202.5	\$18.05	Blended	39	HS Diploma / Equivalent, Background Check	\$37,695.00	\$420.00	\$37,695.00
	YES	YES	Automotive Technology II	AS	51 weeks	1380	\$18.77	Blended	222	HS Diploma / Equivalent, Background Check	\$41,145.00	\$420.00	\$41,145.00
	YES	YES	Automotive & Diesel Technology II	AS	75 weeks	2033	\$18.05	Blended	29	HS Diploma / Equivalent, Background Check	\$52,445.00	\$420.00	\$52,445.00

*Blended = Training is offered both online and in the classroom.

Memorandum #03-23 (OPS) Revised

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Addition of New Courses for Existing Training Provider Hollywood Career Institute

Date: August 3, 2023

SUMMARY

Consideration to add three (3) courses from current Eligible Training Provider Hollywood Career Institute: 1) Massage Therapy 2) Hemodialysis Tech and 3) Medical Assistant with Basic X-Ray to the WIOA Individual Training Account List. These programs provide opportunities to train for careers in the healthcare industry and are in high demand. CSBD reviewed the applications for completeness and to ensure that Board-mandated criteria have been met for the training programs and related occupational titles. Approved at the 8/1 One Stop Services Committee meeting.

BACKGROUND

WIOA requires classroom or online training to be provided through ITAs at schools and for courses approved by the local workforce board. Additionally, all occupational training must prepare students for in-demand occupations appearing on the Targeted Occupations List (TOL) and meet the Board-established minimum evaluation criteria. This includes but is not limited to licensure, accreditation, issuance of an industry-recognized credential, and reporting to the Florida Education and Training Placement Information Program (FETPIP). All of our current eligible training providers meet these criteria.

DISCUSSION

HCI, an approved CSBD-eligible training provider, is licensed by the Commission on Independent Education (CIE). Their accreditation is from the US Dept of Education-approved Council on Occupational Education. HCI also submits data reports to FETPIP.

HCI has applied to add three (3) programs 1) Massage Therapy 2) Hemodialysis Tech and 3) Medical Assistant with Basic X-Ray to our WIOA ITA List. These programs provide opportunities to train for careers in the healthcare industry. Specifically, the courses submitted will prepare participants for employment in the following in-demand occupations as shown in the chart on the next page.

Eligible Training Provider and Courses to be Added to the WIOA ITA List

Training Provider	Training Program	TOL Occupation	Entry Wage
Hollywood Career Institute	Massage Therapy	Massage Therapists	\$13.97
	Hemodialysis Tech	Health Technologist/Technician – All Others	\$15.30
	Medical Assistant with Basic X-Ray	Medical Assistants	\$14.87

A CSBD review committee comprised of staff from Operations, Quality Assurance, and our appropriate intermediary reviewed the application and programs. The committee has determined that all Board-mandated criteria have been met for the school, training programs, and related occupational titles. This includes but is not limited to 1) licensure 2) accreditation 3) issuance of an industry-recognized credential 4) 25 or more job openings in Broward County and 5) reporting to FETPIP.

As these are new courses on our ITA list, we will limit enrollment to ten (10) customers per program until performance can be established.

RECOMMENDATION

Approve the application from current Eligible Training Provider Hollywood Career Institute to add 1) Massage Therapy 2) Hemodialysis Tech and 3) Medical Assistant with Basic X-Ray to the WIOA Individual Training Account List.

**ITA Course Summary Spreadsheet
Attachment to Memo #03-23 (OPS)**

School Name / Location	License / State Agency Approval	DOE Accreditation	Course Title	Type of Credential Offered	Program Length	Clock Hours	Entry Wage	Course Offering (Virtual/ Classroom/ Blended)	Class Size (Max)	Pre-requisites	Tuition and Fees	Other Costs (Books, Uniforms, Supplies, Cert./Lic. Exams)	Program Total Costs
Hollywood Career Institute	YES	YES	Massage Therapy	Diploma	26 weeks	600	\$13.97	Blended	20	HS Diploma	\$11,350.00	\$650.00	\$11,350.00
	YES	YES	Hemodialysis Tech	Diploma	26 weeks	600	\$15.30	Blended	20	HS Diploma	\$8,550.00	\$945.00	\$8,550.00
	YES	YES	Medical Assistant with Basic X-Ray	Diploma	52 weeks	1300	\$14.87	Blended	20	HS Diploma	\$12,550.00	\$875.00	\$12,550.00

*Blended = Training is offered both online and in the classroom.

Memorandum #02 – 23 (FS)

To: Executive Committee
From: Carol Hylton, President/CEO
Subject: General Fund Balance
Date: August 4, 2023

SUMMARY

At the December 2022 Board meeting, we reported that the General Fund balance was \$901,711. From 11/1/22 through 6/30/23, we realized revenues of \$334,195 and incurred expenditures of \$215,625 for an ending balance including the reserves, \$1,020,281 in the General Fund as of 6/30/23.

BACKGROUND

Per governing board direction CSBD holds a portion of the General Fund in reserve to:

1. Assure funds are available in the event of a questioned or disallowed cost. We carry D&O insurance, but we set aside funds, as not all expenditures are covered by our insurance.
2. Cover the principal payments for the 2890 W. Cypress Creek Road 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 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 the majority of the payment will be made up of the principal. We use the depreciation collected to pay for the principal.

Fiscal has calculated the amount that will be needed to pay the principal and tracks it on a monthly basis.

Chart 1- General Fund Reserves

Category	Dollar Amount
Contingency reserve	\$250,000
Depreciation collected to date: \$748,853	
Less Principle paid with Depreciation revenue since 1/1/2019 (\$500,983)	\$247,870
Total	\$497,870

Chart 2, below is the list of projected expenditures budgeted and approved by the CSBD governing boards that are charged against the General Fund.

Chart 2- Board Approved Budgeted Items

Category	Dollar Amount
Food (Calendar Year)	\$27,000
Ticket to Work staff salary, benefits & overhead	\$98,500
Application of our Indirect Cost Rate	\$18,281
Tripp Scott	\$50,000
President and Legal Counsel Salary Cap	\$31,700
Total	\$225,481

DISCUSSION

The General Fund balance as of last November was \$901,711. Chart 3, below is a list of the revenues and expenditures from 11/1/22 through 6/30/23. During this period revenues totaling \$334,195 and expenditures totaling \$215,625 were incurred. The total of all revenues and expenditures is an ending balance including the reserves of \$1,020,281 in the General Fund.

Chart 3- Revenues and Expenditures 11/1/22 – 6/30/23

Category	Revenues	Expenditures	Comments
Investment Interest	18,935		
Reimbursement to CSBD	350		Restitution of funds
Ticket to Work (TTW)	202,493	43,921	
Depreciation collected from grants	112,042		
Tobacco Free Florida	375		
FY 22/23 Building Principal		79,670	Paid to date \$713,775
Food expense		13,547	
Indirect Costs		15,348	
President and Legal Counsel Salary Cap		29,806	
Tripp Scott		33,333	
Total	\$334,195	\$215,625	

The General Fund balance as of 06/30/23 is \$1,020,281 of this amount \$497,870 is held in reserve leaving a balance of \$522,411.

RECOMMENDATION

None. For information purposes.

Attachment: General Fund Spreadsheet

CSBD General Fund Revenues and Available Funds 11/1/22 - 06/30/23			
BALANCE 11/1/22		\$	901,711
REVENUES			
Depreciation Collected		112,042	
Ticket to Work		202,493	
Tobacco Free Florida		375	
Interest		18,935	
Other Reimbursements/Credits		350	
Total Revenue			334,195
EXPENDITURES			
Mortgage Principal		(79,670)	
Salary Cap		(29,806)	
Advocacy- Tripp Scott		(33,333)	
Ticket to Work		(43,921)	
Food		(13,547)	
Indirect Costs		(15,348)	
Total Expenditures			(215,625)
Net Revenue over Expenditures			118,570
Total General Funds as of 06/30/23			1,020,281
Less Reserves			
Contingency Funds		(250,000)	
Funds Collected for Depreciation		(748,853)	
Less: Principle Paid		500,983	
			(497,870)
Unobligated General Fund Balance			\$522,411

Memorandum #01 – 23 (FS)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Budget vs. Actual Expenditure Report

Date: August 4, 2023

SUMMARY

Detailed below is the Budget vs. Actual Expenditure Report. Each year we budget to spend 100% of our grants. As the governing boards are aware WIOA funds are available for 2 years and also allow for a 20% allocation carry forward each year to avoid a cliff effect due to fluctuations in allocations as we experienced this year. The State extended the period for the expenditure of welfare transition program (WTP) funds this year through August, and the funds are being invested in the summer program. The strategies we put in place last year are working.

BACKGROUND

Pursuant to sound financial practices we provide reports on Budget vs Actual expenditures. CSBD receives some of its funds based on its program year which is July 1 – June 30 and some of its funds based on the federal fiscal year October 1 – September 30 which is also the CSBD fiscal year.

DISCUSSION

Chart 1 depicts funding streams received on a program year basis through 6/30/23 and represents expenditures at 100% of the program year.

Chart 1: July 1, 2022 – June 30, 2023 Budget vs. Actual at 100% of the Year

Notes	Funding Stream	PY 22-23 Budget	Actual Expenditures 7/1/22 – 6/30/23	% Expended
1	WTP (extended through 8/31)	4,287,931	3,613,075	84%
2	WIOA Adult / Dislocated Worker	9,686,500	6,937,727	72%
3	WIOA Youth	5,288,158	3,275,157	62%

Budgeting

Each year we budget to spend 100% of our grants. As the governing boards are aware WIOA funds are available for 2 years and also allow for a yearly 20% carry forward of the WIOA formula allocation to avoid a cliff effect due to a fluctuation in allocations as we experienced this year. Because discretionary grants have a shorter shelf life, we often will purposely spend discretionary funds before formula funds to assure we take full advantage of the funds available for our local area.

This year the State extended the period for the expenditure of welfare transition program (WTP) funds through August 31 and the funds are being invested in the summer program.

Addressing Expenditure Fluctuation

Following the first quarter last year we were aware that program expenditures in the WIOA adult and youth programs were still lagging over pre-pandemic years. During the second quarter of the year, we began implementing the strategies below, some of which required formal procurements, while other strategies required coordinating with our partners to engage them in our efforts. These included:

- Procuring and engaging Moore Communications and Goodman, PR to market and outreach services to employers and job seekers
- ITA fairs with our training providers
- Paid internships to youth graduating from post-secondary programs who needed experience in their field to be competitive in the labor market
- Working with employers to expand apprenticeship awareness
- Increased participation in community events
- Increased the in-school contracts and caseloads for the School Board and Junior Achievement
- Budgeted for a Career Awareness event for in-school youth

As a result of these strategies, we are seeing a marked increase in foot traffic in all the one stops and the demand for work-based training and ITA's is significantly on the rise.

Chart 2 depicts funding streams received on a federal fiscal year basis through 6/30/23 which represents 75% of the year.

Chart 2: October 1, 2022 – September 30, 2023 Budget vs. Actual at 75% of the Year

Notes	Funding Stream	PY 22-23 Budget	Actual Expenditures 10/1/22 - 06/30/23	% Expended
1	Veterans	286,783	121,733	42%
2	SNAP	343,495	242,435	71%
3	Wagner Peyser (WP)	1,174,757	758,106	65%

Veteran Program

We receive pass through funds from the state for facilities and overhead which are expended when we have a full complement of Veteran's staff. Due to a freeze at the state, we have not been able to fill vacant positions and therefore are not able to spend pass through funds.

RECOMMENDATION

None. For information purposes only.

Memorandum #28-22 (OPS) Revised

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: WIOA Youth Performance for Program Year (PY) 22/23

Date: August 9, 2023

SUMMARY

CSBD funds 4 Out-of-School (OSY) and 2 In-School Youth (ISY) programs. The youth receive case management, career pathway planning, occupational skills training, and job readiness preparation. This Youth Performance report provides the Executive Committee with provider performance as required under their agreements and in accordance with the Workforce Innovation and Opportunity Act (WIOA). As reported previously the providers implemented strategic recruitment, engagement, and placement plans and were successful. We congratulate our OSY and ISY providers on their successes during the program year.

BACKGROUND

For Program Year 23/24 CSBD funded 4 OSY program contracts for the delivery of WIOA youth services as follows:

1. The School Board of Broward County (SBBC) – GED for High School Drop Outs
2. The Fort Lauderdale Independent Training and Education (FLITE) Center – Let's Get To Work Program,
3. Helping Advance and Nurture the Development of Youth (HANDY) – The LIFE Program,
4. Center for Independent Living (CIL) – Jobs for youth.

Each OSY program serves youth between ages 17-24 through case management, referrals to WIOA-funded services, career pathway and planning, employability skills training, and paid work experience as well as access to the WIOA 14 elements as appropriate to the youth.¹

CSBD also funded 2 ISY program contracts for the delivery of WIOA youth services, serving seniors to assure they stay attached to school through graduation. The seniors receive a work experience and have access to the WIOA 14 elements as appropriate to the youth, as follows:

1. SBBC
2. Junior Achievement of South Florida (JASF)

¹ The WIOA 14 elements are the individual services allowed which help youth succeed such as tutoring, work experience, case management, employability skills, ITA's, counseling, follow up, citizenship, financial literacy, etc.

DISCUSSION

This Youth Performance report provides the Youth Committee with provider performance as required under their agreements and in accordance with WIOA. As reported previously the providers' implemented strategic recruitment plans and were successful. All of our providers have met their enrollment contract deliverables. The charts below give the Committee members an overview of each provider's performance from 7/1/22 to 6/30/23.

OSY Programs

The SBBC program provides youth with assistance towards obtaining their high school credential together with individual pathway plans and employability skills training.

SBBC GED Program			
Contract Deliverables	Due Date	Current Performance	CSBD Comments
Enroll 135 youth into the OSY GED program.	6/30/23	137 youth were enrolled. 24 youth were carried forward from PY 21/22.	
90% of youth enrolled must achieve a Measurable Skills Gain (MSG).	6/30/23	128 youth (93%) received an MSG.	
Of the 94 youth that must exit by 6/30 80 youth (85%) must complete their GED by 6/30/23.	6/30/23	94 youth (100%) have obtained their GED.	
Of the 94 youth that must exit prior to 6/30, 80 youth (85%) must enter the military, post-secondary education, or be in unsubsidized employment during the 2 nd quarter after exit.	6/30/23	107 youth have exited, 93 (87%) have been placed.	

HANDY's The LIFE Program serves youth with barriers to employment and education through case management; referral to WIOA funded services, work experience, career pathway planning, job placement, and follow up services.

HANDY – THE LIFE PROGRAM			
Contract Deliverables	Due Date	Current Performance	CSBD Comments
Enroll 30 OSY	6/30/23	30 youth were enrolled. 11 youth were carried forward from PY 21/22.	
100% of youth enrolled in training must achieve a measurable skills gain (MSG).	6/30/23	5 youth were enrolled in training. To date, 3 have received a measurable skills gain.	2 of the youth have had intervening issues and are not participating at this time.
100% of youth enrolled in a GED or post-secondary training must attain their GED or post-secondary credential in the program year in which they exit.	6/30/23	3 youth in training have obtained their credential (60%).	
Of the 15 youth that will exit prior to 6/30/23; 13 youth (85%) shall enter the military, post-secondary education, or be in unsubsidized employment in the 2 nd quarter after exit.	6/30/23	18 youth have exited, 11 youth (61%) have been placed.	

FLITE's Let's Get to Work program serves foster care youth with on-site GED preparation, employability skills training, and WEX to ensure the successful transition into adulthood.

THE FLITE CENTER			
Contract Deliverables	Due Date	Current Performance	CSBD Comments
Enroll 36 - 45 youth.	6/30/23	45 youth were enrolled. 16 youth were carried forward from PY 21/22.	
100% of youth enrolled in training must achieve a measurable skills gain.	6/30/23	N/A - No youth are enrolled in training.	
100% of youth enrolled in training must obtain their GED or post-secondary credential in the year that they exit.	6/30/23	N/A - No youth are enrolled in training.	
Of the 18 youth that must exit prior to 6/30/23; 15 youth / 85% of the youth shall enter the military, post-secondary education, or be in unsubsidized employment in the 2 nd quarter after exit.	6/30/23	36 youth have exited, and 28 (78%) have been placed.	

CIL's Jobs for Youth program helps youth with disabilities achieve their career and occupational goals through help with peer counseling, WEX, and employability skills training.

CILB			
Contract Deliverables	Due Date	Current Performance	CSBD Comment
Enroll 12 - 15 youth	6/30/23	12 youth were enrolled.	
Of the 6 youth that must exit prior to 6/30/23; 5 youth or 85% of the 6 youth shall enter the military, post-secondary education, or be in unsubsidized employment in the 2 nd quarter after exit.	6/30/23	6 youth have exited and 6 (100%) have been placed.	

ISY Programs

SBBC ISY provides youth with assistance towards obtaining their high school credentials together with individual pathway plans and employability skills training.

SBBC ISY Program			
Contract Deliverables	Due Date	Current Performance	CSBD Comments
Enroll 50 high school seniors into the ISY program.	6/30/23	50 youth were enrolled.	
100% of youth enrolled must achieve a Measurable Skills Gain (MSG).	6/30/23	50 youth (100%) received an MSG.	
Of the 50 youth that must exit by 6/30 45 youth (90%) must complete their High School Diploma by 6/30/23.	6/30/23	49 youth (98%) have graduated.	
Of the 50 youth that must exit by 6/30, 45 youth (90%) must enter the military, post-secondary education or be in unsubsidized employment during the 2 nd quarter after exit from the program.	6/30/23	49 youth have exited, 49 youth (100%) have been placed.	

JASF ISY provides youth with employability skills training and assists youth with planning their individual career pathways.

JASF ISY Program			
Contract Deliverables	Due Date	Current Performance	CSBD Comments
Enroll up to 25 high school seniors into the ISY program.	6/30/23	15 youth were enrolled.	
100% of youth enrolled must achieve a Measurable Skills Gain (MSG).	6/30/23	15 youth (100%) have earned a MSG.	
Of 25 youth that must exit by 6/30 23 youth (90%) must complete their High School Diploma by 6/30/23.	6/30/23	13 youth have graduated.	
Of the 25 youth that must exit prior to June 30, 23 youth (90%) of the 50 youth must enter the military, post-secondary education, or be in unsubsidized employment during the 2 nd quarter after exit from the program so as to be considered as having met the "employment measure."	6/30/23	11 youth have exited, 10 (91%) have been placed.	

RECOMMENDATION

None. For information purposes only.

Memorandum #01 – 23 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Results of the Cherry Bekaert, LLP Fiscal Monitoring – Report #2
PY 22/23 Issued 5/23

Date: May 23, 2023

SUMMARY

Cherry Bekaert conducted fiscal monitoring for the period 10/1/22 through 2/28/23. Cherry Bekaert reviewed a total of 921 elements during the review period. There were no findings or observations. Based upon the total elements reviewed, this was a 0% error rate.

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 10/1/22 through 2/28/23. Cherry Bekaert reviewed a total of 921 elements during the review period. There were no findings or observations. Based upon the total elements reviewed, this was a 0% error rate.

RECOMMENDATION

None. For information purposes only.

QA #01-23 ATTACHMENT A
Cherry Bekaert Fiscal Findings - PY 22-23
Monitoring Report #2

Procedure	Report #2 10/1/22 - 2/28/23
Bank Reconciliation – Accounts Payable Master Account	0
Bank Reconciliation - General Fund Account	0
Bank Reconciliation - Operating Master Account	0
Bank Reconciliation - Participant Payroll Account	0
Bank Reconciliation - Staff Payroll Account	0
Budget vs Actual Grants/Programs	0
Cash Draw	0
Cash Receipts	0
Cell Phone Expenditures	0
Customer-Related Expenditures - WIOA ITA & WTP	0
Employee Separations	0
ETA Salary and Bonus Cap Calculation	0
Insurance	0
Integrative Staffing Payroll	0
Internal Control Website Review	0
Local Plan Controls Review	0
Mileage Reimbursements (Individuals)	0
Mileage Reimbursements (Service Provider)	0
On the Job Training (OJT)	0
Participant Payroll	0
Previous Year-end Audit Adjusting Journal Entries	0
Previous Year-end Single Audit Report	0
Procurement- Micro Purchase	0
Procurements - Small Purchases	0
Property Management - PPE	0
Staff Payroll	0
Subawarding/Subrecipient Monitoring	0
Walkthrough - Cash Draw	0
Welfare Transition Program (WTP) Community Work Experience	0
Youth Support & WIOA (AD/DW) Payments	0
TOTAL	0

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

Memorandum #02 – 23 (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 22/23 – Issued 2/23

Date: July 18, 2023

SUMMARY

THMP conducted program monitoring for the period 11/18/22 through 2/21/23. They reviewed a total of 177 files consisting of 6,029 elements. There were 4 findings and 11 observations. This equates to an error rate of (.06%), or less than 1%. All findings and observations were corrected except where cases were closed, and no further action could be taken.

BACKGROUND

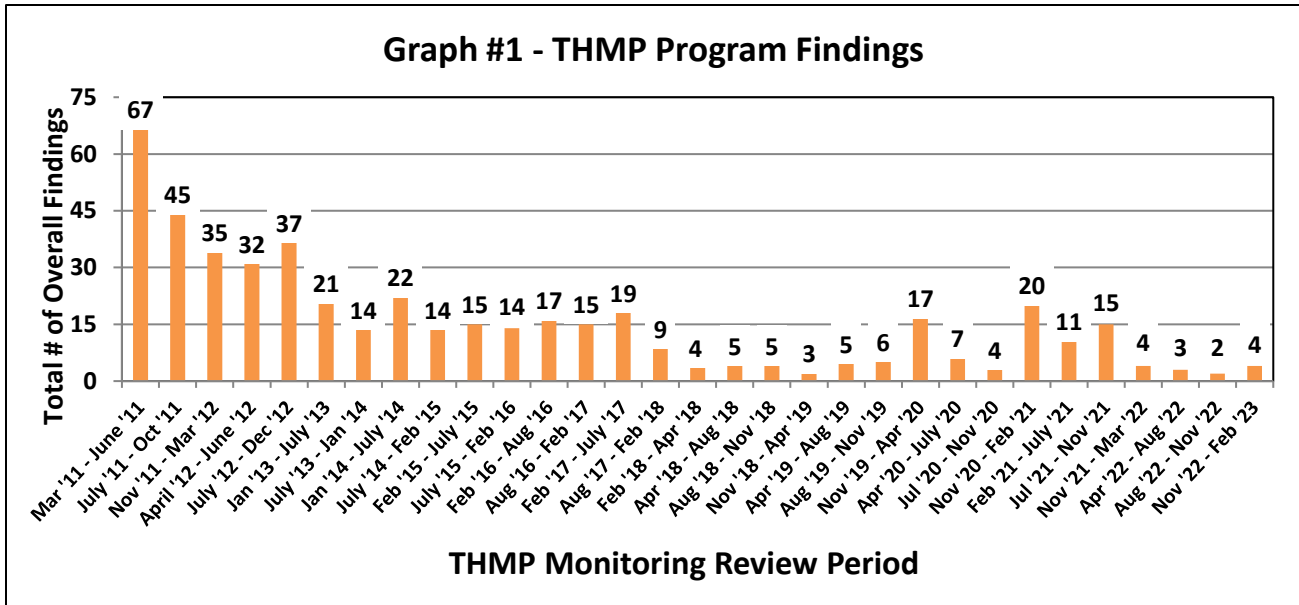
THMP monitors program activities three times a year. This was their second report for PY 22/23.

DISCUSSION

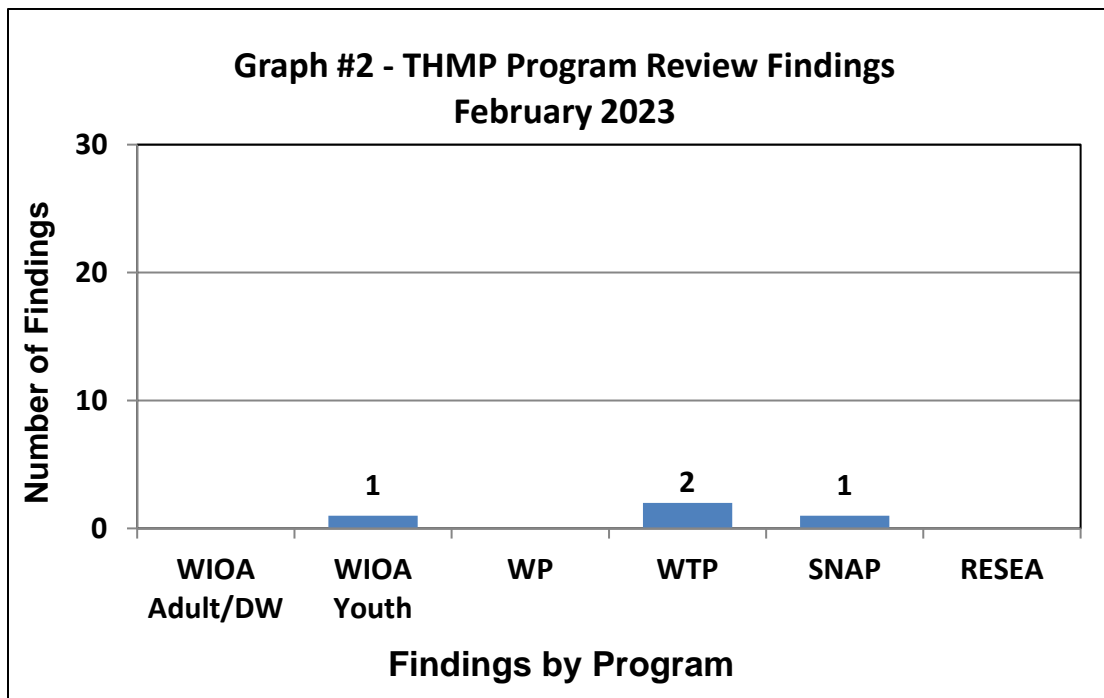
THMP identified 4 findings and 11 observations during their program monitoring visit. They reviewed a total of 177 files consisting of 6,209 elements. This equates to an error rate of .06%, or less than 1%. This monitoring covered the period 11/18/22 through 2/21/23.

THMP Program Findings

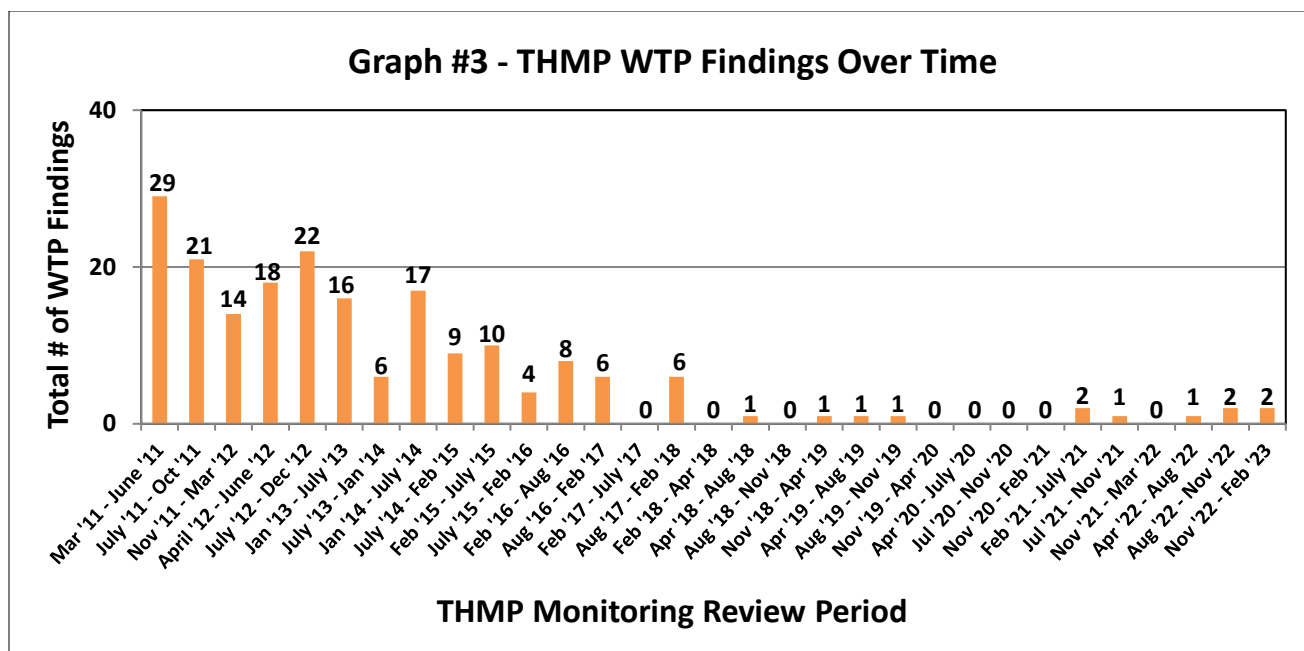
A trending chart for THMP program findings, per review period since March 2011, is represented in Graph #1, as follows:



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



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



THMP Program Findings for the period of November 2022 – February 2023

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 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 and no observations.

- B. 6 WIOA Adult and Dislocated Worker files who exited within the last 12 months were reviewed, 2 from each Center. There were no findings.

There was 1 observation.

Observation WIOA Adult/Dislocated Worker File/System Review
A customer's employment wage rate was recorded incorrectly on Employ Florida (EF) at case closure. (North – 1)
Recommendation
Staff should correct the employment wage information in EF.
Agree/ Disagree
Agree
Resolution
Staff corrected the wage rate calculation and updated the documentation in EF. The WIOA Program Manager addressed the matter in a Supervisors' meeting on 3/8/23 and during the WIOA All-Staff Income Training on 3/10/23.

II. WIOA Youth

- A. 16 WIOA Youth files were reviewed: 3 CareerSource Broward (CSBD), 2 Center for Independent Living (CIL), 4 FLITE Center, 3 HANDY, and 4 School Board of Broward County (SBBC).

There was 1 finding.

Finding WIOA Youth File/System Review
A customer's annualized family income (AFI) was calculated incorrectly. (CSBD – 1)
Recommendation
Staff should correct the AFI calculation and update the customer file and EF. Whether to serve the youth as a 5% over-income exception or use WIOA Adult funds should be determined.
Agree/ Disagree
Agree
Resolution
The correct employment wage rate has been updated in the customer's file. This file has been approved as a 5% over-income exception. The WIOA Program Manager provided training on income calculations for the WIOA staff on 3/10/23. Targeted monitoring of ongoing compliance during monthly desk reviews started in May 2023 and will continue during routine QATC monitoring.

There was 1 observation.

Observation WIOA Youth File/System Review
A customer's annualized family income (AFI) was calculated incorrectly. (CSBD – 1)
Recommendation
Staff should correct the AFI calculation and update the documentation in the customer file and EF.
Agree/ Disagree
Agree
Resolution
The AFI calculation has been corrected, and the documents are updated in the customer file and EF. The WIOA Program Manager provided training on income calculations for the WIOA staff on 3/10/23. Targeted monitoring of ongoing compliance during monthly desk reviews started in May 2023 and will continue during routine QATC monitoring.

- B. 6 WIOA Youth files that exited within the last 12 months were reviewed, 2 from the FLITE Center, 2 HANDY, and 2 SBBC.

There were no findings.

There were 2 observations.

Observation WIOA Youth File/System Review	
a)	The customer employment start date was recorded incorrectly in EF at case closure and did not match the documentation in the customer's file. (FLITE – 1)
b)	The second quarter follow-up was not completed and documented in EF after exit. (FLITE – 1)
Recommendation	
a)	Staff should correct the employment information in EF to align with the customer file.
b)	Youth provider staff should ensure that all follow-ups are conducted and documented timely in EF.
Agree/ Disagree	
Agree	
Resolution	
a)	The customer employment start date has been updated in EF to align with the documents in the customer file.
b)	The Program Manager conducted a refresher training with the youth provider Supervisor on how to run quarterly follow-up reports in EF, and the Supervisor was provided a "How To" training tool.
The Youth Provider Supervisor will continue to run monthly follow-up reports in EF through May 2023 to ensure all follow-ups are in compliance and will discuss any outstanding entries with staff as needed.	

III. Wagner-Peyser (WP)

- 30 WP accounts were reviewed, 10 from each Center.
 - **There were no findings or observations.**
- 30 WP job orders were reviewed.
 - **There were no findings or observations.**

IV. Reemployment Services and Eligibility Assessment (RESEA)

10 RESEA files were reviewed from Central.

There were no findings or observations.

V. Welfare Transition Program (WTP)

A. 23 WTP mandatory files were reviewed (8 each from North and Central, and 7 from South).

There were 2 findings.

Findings WTP File/System Review	
a)	A signed copy of an IRP was missing from the case file. (IRP's North – 1)
b)	The customer timesheets were missing from the case file and did not correspond with JPR entries. (JPR's Central – 1)
Recommendation	
Staff should ensure appropriate documentation is in case files and JPR entries are accurate.	
Agree/ Disagree	
Agree	
Resolution	
a)	The signed IRP has been added to the customer file. The Supervisor conducted individual counseling with staff, which included a review of the policy regarding IRP development and timely scanning documentation.
b)	The missing timesheets have been uploaded to the customer file and correspond to the JPR entries. The Supervisor counseled the staff regarding timely scanning documentation. A process has been established to ensure proper staff coverage for timesheet entry.

There were 4 observations.

Observation WTP File/System Review	
a)	Staff did not complete the IRP and did not assign the work activities in a timely manner. (IRP's North - 1)
b)	Steps to self-sufficiency on IRP in the case files were missing end dates in the work activity assignment. (IRP's North – 2)
c)	No documentation of timely follow-ups or attempted customer contact. (Case

Management North – 2; South – 1)
d) A sanction was not requested in a timely manner for the participant. (Pre-Penalties/Sanctions Central – 1)
Recommendation
Staff should ensure appropriate actions are taken timely and documented accurately.
Agree/ Disagree
Agree
Resolution
a & b) The Supervisor reviewed the IRP policy on completing IRPs and assigning activities with WTP staff. The WTP Program Manager conducted a region-wide training covering these observations with WTP staff in April 2023. The WTP Supervisors are continuing to conduct random reviews of the caseloads to ensure policy compliance.
c) The Supervisors provided training to WTP Staff to ensure timely attempts to engage customers are documented. WTP Program Manager also covered this observation during a region-wide training with WTP staff in April 2023. Compliance is being reviewed during monthly supervisor desk reviews and routine QATC monitoring.
d) A process has been implemented to ensure proper staff coverage, and penalties are requested timely when assigned to staff. Center Managers and Supervisors have also facilitated one-on-one discussions with team members regarding proper protocol when requesting time off and coordinating staff coverage. WTP Program Manager also covered this observation during a region-wide training with WTP staff in April 2023.

B. 21 WTP transitional files were reviewed, 7 from each center.

There were no findings.

There was 1 observation.

Observation WTP File/System Review
Although the participant was eligible to receive Transitional Services (TS), services were opened and issued on a date prior to the date that the case was changed from Mandatory to TS. (Transitional North – 1)
Recommendation
Staff should ensure that cases are correctly processed when changing from Mandatory status to Transitional status, and when opening and providing related services.
Agree/ Disagree
Agree
Resolution

WTP Supervisor began reviewing all mandatory cases five days prior to the scheduled transfer to ensure customers received all Mandatory services and that eligible services were coded correctly. WTP Program Manager also conducted a region-wide training covering this observation with WTP staff in April 2023.

C. 1 WTP Upfront Diversion files were reviewed from South.

There were no findings.

There was 1 observation.

Observation WTP File/System Review
Staff did not enter the employment verification in the customer's OSST file, and the Up-Front Diversion forms were incomplete. (Up-Front Diversion South – 1)
Recommendation
Staff should ensure appropriate actions are taken timely and documented accurately.
Agree/ Disagree
Agree
Resolution
WTP staff attended the Talyor Hall Regional training on 4/30/23 that covers Upfront Diversion services. WTP Program Manager also conducted region-wide training covering this observation with WTP staff In April 2023.

VI. Supplemental Nutritional Assistance Program (SNAP)

10 SNAP files were reviewed from Central.

There was 1 finding.

SNAP File/System Review
Required hours were not assigned to the participant in the SNAP E&T component for one month. (Engagement Central – 1)
Recommendation
SNAP Success Coaches should ensure that required monthly hours are assigned.
Agree/ Disagree
Agree
Resolution
The case could not be corrected. The Program Manager coached the Supervisor, Assistant Center Manager, and the Center Managers regarding the appropriate assignment of activities according to local policy. Adherence to the policy is being reviewed during monthly supervisor desk reviews and QATC monitorings.

There was 1 observation.

Observation SNAP File/System Review
Staff did not follow local penalty procedures when determining compliance for lifting a pending sanction for the participant. (Conciliations and Sanctions Central – 1)
Recommendation
SNAP Success Coaches should ensure local penalty procedures are followed and penalties are properly processed.
Agree/ Disagree
Agree
Resolution
In March 2023, the SNAP Supervisor reviewed the sanction policy with the Center Manager. Sanctions will be monitored during monthly supervisor desk reviews and QATC monitoring.

RECOMMENDATION

None. For information purposes only.

Memorandum #03 – 23 (QA)

To: Executive Committee

From: Carol Hylton, President/CEO

Subject: Acceptance of the DEO Financial and Programmatic Monitoring Report dated December 1, 2022

Date: August 7, 2023

SUMMARY

The Florida Department of Economic Opportunity (DEO) issued their Financial and Program Monitoring Report on 12/1/22 for the period 4/21 through 3/22. They reviewed a total of 166 program files consisting of 6,502 elements. There were 0 fiscal findings, observations, and technical assistance items. There were 9 program findings and 6 non-compliance issues. The program findings equate to an error rate of .14% less than 1%. All findings and non-compliance issues were corrected except where cases were closed, and no further action could be taken. Our Corrective Action Plan was accepted on 4/13/23.

BACKGROUND

DEO conducted its annual fiscal and program monitoring review in June 2022. The review covered the period 4/1/21 through 3/31/22.

The following programs were reviewed:

1. Financial management practices, record keeping, safeguards and reporting
2. Welfare Transition Program (WTP)
3. Supplemental Nutrition Assistance Program (SNAP)
4. Workforce Innovation and Opportunity Act (WIOA)
5. Trade Adjustment Assistance (TAA)
6. Wagner-Peyser (WP)
7. Jobs for Veterans State Grant (JVSG)
8. Any identified special projects operational during the review period

DISCUSSION

State Findings for the period of April 2021 – March 2022

Fiscal Review: There was 1 fiscal non-compliance issue. DEO posited that CSBD had not updated its Administrative Plan since 2011. CSBD does not agree with this issue because the Administrative Plan, unlike the 4-Year Workforce Plan, is not a statutory or regulatory requirement. DEO last requested that an Administrative Plan be submitted or updated in 2011, and has been silent in this regard for the past 12 years. DEO has not issued guidance, requested an update, or reviewed the Administrative Plan in all this time. The Administrative Plan is a summary of the CSBD Fiscal and Administrative Policies. These policies have been updated, and DEO has reviewed them many times over the years. CSBD is updating the Plan, as the monitors have requested, however it has no impact on operations as staff operated based upon current CSBD, State and Federal policies.

Program Review: The DEO identified 9 program findings, along with 6 “non-compliance issues,” which must be corrected to avoid a future finding. All the findings and non-compliance issues were corrected. 166 files were reviewed consisting of 6,502 elements. The findings equate to an error rate of .14% less than 1%.

Program findings and observations are forwarded to Career Center and Program Managers as well as to service providers, if appropriate, for responses and resolution. The findings and observations are presented below, along with the corrective action taken.

There were 0 Fiscal Findings.

There was 1 Fiscal Non-compliance Issue:

Non-Compliance Issue FMA 22.22.01 – Category 3.0 Internal Control Environment
CSBD's Administrative Plan, which was last revised in January 2011, contained information, processes, and references that were outdated. The updated financial and activity specific policies do not address all areas of CSBD's administrative functions.
Recommendation
CSBD should review and update its Administrative Plan to ensure it reflects all current policies and processes as well as adherence with applicable state and federal laws, rules, regulations, policies, guidance, and the terms of the Subrecipient Agreement.
Agree/Disagree
Disagree
Resolution
<ul style="list-style-type: none">• CSDB requested that this issue be categorized as a Technical Assistance matter because DEO has never requested that the Administrative Plan be updated, although the Local Workforce Plan is updated every 2 years. Additionally, no DEO communiques regarding updates to program and fiscal policies reference the Administrative Plan, so there was no signal from the state that this was required.• CSBD indicated to DEO that we have current written administrative policies, procedures, and fiscal controls in place, as evidenced from their provision to DEO and having no fiscal findings from the current and past monitoring.• CSBD did agree to update the Administrative Plan.

There were **9** Program Findings:

Finding WT 22.22.01 – Documentation of Activity Hours Recorded on the Job Participation Rate (JPR) Screen
Documentation in 1 participant case file did not support Job Participation Rate (JPR) hours reported to the DCF or HHS.
Recommendation
CSBD should ensure that documentation for participation rate hours are verified by staff prior to entering the hours in OSST.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none">• This was an isolated incident.• Projected hours were recorded instead of actual hours. The projected hours were removed and the case has since closed.• Annual WTP training 10/28/2022, covered required documentation to support JPR hours.• Our QA monitoring tool addresses compliance with documentation of activity hours on the Job Participation Rate Screen.

Finding WT 22.22.02 – Pre-penalty and Sanction Process
There was no evidence of a verbal attempt to contact 2 participants during the 10-day counseling period when a pre-penalty was initiated. (Central-1, South-1).
Recommendation
CSBD should attempt to contact participants during the 10-day counseling period so they are aware of the program requirements & OSST case notes are entered.
Agree/Disagree
Agree
Resolution

- In both cases, staff were successful in orally contacting the participants; however, this was not fully documented in the case note.
- Annual WTP, training 10/28/2022 included a review of required documentation of the pre-penalty process.
- On 12/6/2022, the WTP Program Manager sent an email to WTP staff reminding them of the pre-penalty process that requires counseling to be documented in the case note.
- The QA monitoring tool reviews compliance with pre-penalty & sanction process.

Finding SNAP 22.22.03 – Sanction Lift Warranted

Two participants did not have a sanction lift requested when warranted upon compliance with program requirements. (South-2)

Recommendation

CSBD should ensure that a sanction lift is requested in OSST when a participant complies with program requirements.

Agree/Disagree

Agree

Resolution

- For these two cases, the sanction lifts were requested, but not completed in a timely manner. The responsible staff member is no longer employed at CSBD.
- CSBD has since created a tracker where staff monitors the 594-activity code in the initial engagement process to ensure that sanction lifts occur at the appropriate time. The sanction lifts are reviewed bi-weekly by the SNAP Supervisor. On 8/16/22, the SNAP Supervisor updated staff regarding the new process.
- Our QA monitoring tool reviews compliance with proper documentation of the sanction process. This item has and will continue to be monitored throughout the program year by Quality Assurance staff, SNAP Supervisors, and external monitors.
- Actions taken if staff fails to follow the requirements will include refresher training, job shadowing, and counseling up to termination.

Finding SNAP 22.22.04 – Assignment of Activity Hours

A participant was not assigned to 80 hours per month in work activities. (South-1)

Recommendation

CSBD should ensure that participants are assigned to 80 hours per month in required work activities.

Agree/Disagree

Disagree
Resolution
<ul style="list-style-type: none"> • We disagree with this finding. • The case was granted an exemption by DCF, and the customer was no longer required to participate in the program. • Upon discussion with the customer and his mother, 80 activity hours were not assigned because the mother explained that the customer was “obviously physically or mentally unfit,” per DCF’s exemption rules. Instead, the customer was referred to DCF to request an exemption and DCF did grant the requested exemption. • Staff have since continued assigning 80 hours to each participant assigned to the region until an exemption by DCF is received, regardless of their ability to participate in the program. Further, CSBD sent a recommendation to DEO to consider adding a “Deferral Status” (similar to WTP) for cases that are pending exemption, but it has not yet been implemented. • Our QA monitoring tool reviews compliance with proper assignment of activity hours. This item has been and will continue to be monitored throughout the program year by Quality Assurance staff, SNAP Supervisors, and external monitors. Since the review, we have not found this to be a recurring issue. • Actions taken if staff fails to follow the requirements will include refresher training, job shadowing, and counseling up to termination. •

Finding WIOA 22.22.05 – Incumbent Worker Training (IWT)
Two IWT participant contracts were missing the required language regarding the use of funding.
Recommendation
CSBD should ensure IWT agreements/contracts contain the required verbiage regarding how work-based funds provided to employers must or must not be used.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • The IWT Master Agreement template was updated to include the requirement not to place participants during a strike.

Finding WIOA 22.22.06 – Recording of Individualized Career Services
Two participants enrolled in an On-the-Job Training (OJT) activity were missing documentation of the OJT on their Individualized Employment Plan (IEP). (South-2)
Recommendation
CSBD should ensure details of the OJT assignment are incorporated into participant IEPs.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • These cases could not be corrected as they were closed prior to the monitoring. • Staff were previously using the OJT Training Plan in place of the IEP, as it outlines short-term and long-term goals to document the OJT activity. Staff training tools and the WIOA Training Manual were updated to include the required utilization of the IEP to document OJT activities. • The 6/15/2022 department staff meeting included training on documenting the OJT activity on the IEP. • On 06/17/2022, the WIOA Program Manager also sent an email reminding staff that the IEP must be completed for every participant enrolled in an OJT activity. • On 9/20/2022, the WIOA Program Manager conducted annual staff training, which reviewed this requirement. • Our QA monitoring tool includes a file sample review to assure compliance with proper OJT activity documentation. Further, subsequent internal monitoring focused on compliance and we have not seen evidence of recurrence.

Finding WP 22.22.07 – Employer-Entered Job Order Review and Verification (<i>Prior Year Issue</i>)
Five employer-entered job orders were missing documentation of CSBD staff review or verification within two business days. (Job Order Unit-5)
Recommendation
CSBD should ensure employer-entered job orders are reviewed for compliance within two business days of entry in Employ Florida.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • These job orders were no longer open and could not be corrected. • The Quality Assurance and Training Coordinators (QATCs) began conducting routine spot checks on new job orders to verify that staff have reviewed assigned

job orders within two business days and the related training presentations were updated to reflect this additional monitoring process.

- Staff trainings on the use of the QA Monitoring Tool were held with Job Order Unit staff on 9/20/2022 and 12/21/2022.
- Our QA monitoring includes a review to assure compliance with the timely verification of job orders. This item has been and will continue to be monitored by Quality Assurance staff and by the Job Order Unit during monthly desk reviews.
- The 2022-2023 QA Program Monitoring was updated to reflect increased monitoring of job orders.
- CSBD's external monitoring included an increased focus on compliance and no evidence of recurrence was seen amongst the sample job orders they reviewed.

Finding WP 22.22.08 – Job Order Minimum Wage Rate Verification

One job order had no documentation to support that staff verified the job order paid at least the State's minimum wage. (Job Order Unit-1)

Recommendation

CSBD should ensure they verify and document that the employer wage rate for the position is at or above the Florida minimum wage (unless exempt). For job orders listed at or below minimum wage, staff documentation must be recorded as a case note on the job order in Employ Florida.

Agree/Disagree

Agree

Resolution

- The identified job order was closed because staff was unable to verify the wage with the employer.
- The QATCs began conducting routine spot checks on new job orders to confirm that staff has verified the wage is at least the Florida Minimum Wage and the related training presentations were updated to reflect this additional monitoring process.
- Staff trainings on the use of the QA Monitoring Tool were held with Job Order Unit staff on 9/20/2022 and 12/21/2022.
- Our QA monitoring includes a review to assure compliance with verification of wages. This item has been and will continue to be monitored by Quality Assurance staff and by the Job Order Unit during monthly desk reviews.
- The 2022-2023 QA Program Monitoring was updated to reflect increased monitoring of job orders.

Finding WP 22.22.09 – Job Seeker Permission for Referrals (<i>Prior Year Issue</i>)
<p>A. One staff-assisted Employ Florida registration was missing documentation of the customers' permission to create their new Employ Florida accounts. (Central-1)</p> <p>B. One staff-entered referral was missing documentation of the customers' permission to refer the job seeker to the job order. (South-1)</p>
Recommendation
Staff must ensure they verify and document that the job seeker's permission was granted prior to or on the same day of the job seeker's registration when registering individuals in Employ Florida and when doing referrals to job orders.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • The file is no longer active because employment was found on 6/11/2021. • During the 9/2/2022 and 9/29/2022 departmental meetings, registration and referral permissions were reviewed with staff. • Our QA monitoring includes a review to check for documentation of the job seeker's permission to create an Employ Florida registration and permission to be referred to a job order. This item has been and will continue to be monitored throughout the program year by Quality Assurance staff, Program Supervisors, and external monitors.

There were **6** non-compliance issues:

Non-Compliance Issue WT 22.22.01 – Documentation of Safety Plan Elements
An Individual Responsibility Plan (IRP) did not include the required elements from the safety plan of a domestic violence victim. (Central-1)
Recommendation
CSBD should ensure that elements from the safety plan are included in the IRP for victims of domestic violence.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • This was an isolated incident. • This occurred approximately one month after the participation waivers were lifted in WTP, which was the reason for the oversight. • The case was closed and could not be updated.

- On 10/28/2022, annual WTP staff training covered proper documentation of safety plan elements on the IRP for participants identified as victims of domestic violence.
- Our QA monitoring tool reviews compliance of proper documentation of safety plan elements on the IRP for participants identified as victims of domestic violence. This item has and will continue to be monitored throughout the program year by Quality Assurance staff, WTP Supervisors and external monitors.
- Actions taken if staff fails to follow the requirements will include refresher training, job shadowing, and counseling up to termination.

Non-Compliance Issue SYEP 22.22.02 – TANF Summer Youth Employment Program (SYEP)

The TANF SYEP Eligibility Screening form was not signed to determine eligibility for one participant. (SYEP-1)

Recommendation

CSBD should ensure participants' TANF SYEP Eligibility Screening forms are completed correctly and signed and dated prior to enrolling a participant in the SYEP.

Agree/Disagree

Agree

Resolution

- This was an isolated incident.
- The date on the Florida screens that were printed out to substantiate eligibility did not match the date the SYEP eligibility form was signed because it was later decided to enroll the participant as TANF SYEP. This has never been cited as an issue previously.
- Moving forward, SYEP will ensure that the Florida screens are printed before or during the SYEP eligibility interview, as evidenced by the print date, when the actual eligibility forms are signed during the SYEP in-person eligibility screening interview.

Non-Compliance Issue SNAP 22.22.03 – Initial Engagement Process (OSST 590-Code)

Six participant files did not have their initial appointment status selected within two business days of completion of the appointment of "No Show" as required. (South-6)

Recommendation

CSBD should ensure that the 590-status code is entered in OSST within two business days of completion of the appointment or no-show.

Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • The required actions were completed, but not within the two-business day window. These cases were worked by SNAP staff members who are no longer employed at CSBD. • Documentation of retraining and notification for staff to monitor results of the 590-appointment setting code in OSST was included in the training presentations sent to staff on 3/23/2022. • From October to November 2022, the Program Manager conducted a sample review of the 590-codes entered in OSST, which all indicated that the appointments were entered timely. • CSBD has updated its SNAP QA Monitoring Tool to review for timely OSST entry of the 590 code. This item has been and will continue to be monitored by Quality Assurance staff and the SNAP Supervisor. • Actions taken if staff fails to follow the requirements will include refresher training, job shadowing, and counseling up to termination.

Non-Compliance Issue WP 22.22.04 – Staffing (Private/Temporary Employment Agencies) (Prior Year Issue)
One job order offered by staffing (private/temporary employment) agencies did not include the phrase “Position offered by no-fee agency” in the job description. (Job Order Unit-1)
Recommendation
Staff must ensure all job orders for private employment/staffing agencies must contain the phrase “Position offered by a no-fee agency.”
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • This was an isolated incident. • The job order was updated to include the phrase “Position offered by no-fee agency” in the job description section. • The QATCs conducted daily spot checks on new job orders to verify that staffing agency job orders contain the phrase “Position offered by no-fee agency” in the job description section. • The QATC and the Job Order Unit conduct reviews of job orders to check for compliance. • Staff training was held on 9/20/2022 and 12/21/2022 with all JOU staff on using the QA Monitoring Tool, which checks if a staffing agency job order contains the

phrase “Position offered by no-fee agency” in the job description section.

- Training presentations were updated to include this process.
- Our QA monitoring includes a review to assure compliance that staffing agency job orders contain the phrase “Position offered by no-fee agency” in the job description section. This item has been and will continue to be monitored by Quality Assurance staff and by the Job Order Unit during monthly desk reviews.

Non-Compliance Issue WP 22.22.05 – Job Referrals (<i>Prior Year Issue</i>)
One job order had a staff referral with unqualified job seekers. (Job Order Unit-1)
Recommendation
Staff must ensure that the “job development” job order type is used instead of “job referral” when accounting for the “reverse referral” of an individual pre-selected to fill a job prior to the entry of the referral in Employ Florida, to avoid future identification of unqualified job seekers.
Agree/Disagree
Agree
Resolution
<ul style="list-style-type: none"> • In this case, the individual was referred to be considered for a WIOA OJT. The job seeker did not have to meet the minimum qualifications because the employer had already indicated that they were willing to train the individual if awarded an OJT contract was documented in the 10/6/21 case note. The employer was interested in hiring the customer and providing the needed training and this was considered a reverse referral. Under WIOA, reverse referrals by employers of individuals who need training to be able to qualify for a posted job are allowed. • CSBD staff have been advised that moving forward, they are to use the “job development” job order type for reverse referrals and similar situations. • Our QA monitoring includes a review to assure compliance that the job seeker being referred meet the minimum requirements on job orders. This item has been and will continue to be monitored by Quality Assurance staff. • The 2022-2023 QA Program Monitoring was updated to reflect increased monitoring of job orders.

Non-Compliance Issue WP 22.22.06 – RESEA Red Flag Drop-off Report
One participant was identified as not being managed and appeared on the RESEA Red Flag Drop-Off Report. (South-1)
Recommendation
CSBD should ensure that cases are managed within 90 days so that they do not appear on the RESEA Red Flag Drop Off Report.
Agree/Disagree
Disagree
Resolution
<ul style="list-style-type: none"> • We disagree with this ONI because the RESEA participant was a no-show but then appeared 2 days after his original appointment. Staff resulted and completed all required documentation. His name should not have appeared on the Red Flag Report list. • During the review, on 6/21/22, CSBD staff discussed the matter with DEO reviewers. CSBD staff believed that since the customer showed up and all requirements were completed, this would “override” the no-show. • CSBD staff have been advised that moving forward, they are to contact the DEO Performance and Analysis Unit for assistance and guidance in future cases when a RESEA participant shows up a few days after their original appointment and all required documentation is resulted and completed by staff. • RESEA staff also routinely review the Red Flag and Yellow Flag reports to ensure timely management of cases.

RECOMMENDATION

None. For information purposes only.