



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD
EXECUTIVE COMMITTEE MEETING
THURSDAY, DECEMBER 8, 2022
8:15 A.M.**

CareerSource South Florida Headquarters
7300 Corporate Center Drive
Conference Room 2
Miami, Florida 33126

The public may view the session online. **Registration is required:**
https://us02web.zoom.us/webinar/register/WN_ISSH7LAzTdywsrtfD2Q3IA

AGENDA

1. Call to Order and Introductions
2. Approval of Executive Committee Meeting Minutes
 - A. November 17, 2022
3. Information - Fiscal Audit Update
4. Information - The EconoVue™ Platform Policy
5. Recommendation as to Approval to Allocate and Purchase EconoVue™ Platform

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"Members of the public shall be given a reasonable opportunity to be heard on a specific agenda item, but must register with the agenda clerk prior to being heard."



SFWIB EXECUTIVE COMMITTEE MEETING

DATE: 12/8/2022

AGENDA ITEM: 2A

AGENDA TOPIC: MEETING MINUTES

SFWIB EXECUTIVE COMMITTEE MEETING MINUTES

DATE: November 17, 2022

LOCATION: CareerSource South Florida
7300 Corporate Center Drive, Suite 500
Conference Room 2
Miami, FL 33126
Zoom: https://us02web.zoom.us/webinar/register/WN_gKA-m86nSZSxCXUhvjFhIg

- 1. CALL TO ORDER:** Chairman Gibson called to order the regular meeting of the SFWIB Executive Committee Meeting at 8:35AM on November 17, 2022.
- 2. ROLL CALL:** 7 members; 4 required; 5 present: Quorum established.

SFWIB EXECUTIVE COMMITTEE MEMBERS PRESENT	SFWIB MEMBERS ABSENT	SFWIB STAFF
Chi, Joe del Valle, Juan-Carlos, Vice-Chairman Ferradaz, Gilda (Zoom) Gibson, Charles, Chair (Zoom) Loynaz, Oscar, M.D. (Zoom) Roth, Thomas "Tom"	Canales, Dequasia	Beasley, Rick Bennett, Renee Gilbert, David (Zoom) Morgan, Ebony ADMINISTRATION/IT Almonte, Ivan Anderson, Francis
OTHER ATTENDEES		
Dalto, Joseph, New Horizons Gallo, Ulisse, EconoView		



Chairman Gibson, attending remotely, transitioned the administration of the meeting to Vice-Chair del Valle considering he is physically present at the location.

Agenda items are displayed in the order they were discussed.

2A. Approval of Executive Committee Meeting Minutes – October 13, 2022

Vice-Chair del Valle presented agenda item 2A. October 13, 2022 Executive Committee Meeting minutes for approval.

No questions or comments were presented for consideration.

Motion by Mr. Chi to approve the SFWIB Executive Committee meeting minutes from October 13, 2022.

Chairman Gibson seconded the motion; **item is passed without dissent.**

3. Information – 2020-2024 Strategic Goals Operational Plan Update

Vice-Chairman del Valle introduced the item; Mr. Beasley further presented.

Mr. Beasley reviewed the 2020-2024 Strategic Goals Operational Plan Monitoring Tool. He advised that members would receive the monitoring tool, which has been designed to keep the Board up to date on funding and/or policy items that have been approved, on a monthly basis. Any changes that have occurred during the month will be highlighted for ease of reference.

Mr. Roth inquired about the design of the report, as it is unclear how the strategies presented align with the number of agendas items utilizing the goal. Mr. Beasley explained that some of the items presented may be informational versus policy and/or funding items; as such, the number of strategies will not always align with the number of agenda items utilizing the goal.

Mr. Roth pointed out that many of the strategies listed can be applied to multiple goals. Mr. Beasley acknowledged that it is possible for many of the programmatic strategies to apply to several of the goals listed; however, the overarching objective is to improve outcomes for local businesses and our constituency. The objective of the document is to keep the Board informed of what staff is doing to achieve the targets set for the program year; including the allocations approved and the amount of spend to date.

No further comments or suggestions were submitted from the members. Item closed.

4. Information – The Mayor’s Career & Job Fairs

Vice-Chairman del Valle introduced the item; Mr. Beasley further presented.



Since February 2022, the Office of Mayor Daniella Levine Cava, the Miami-Dade County Human Resources Department and CareerSource South Florida (CSSF) has hosted monthly Career & Job Fairs throughout Miami-Dade County.

Mr. Beasley provided an overview of the number of constituents that have attended the job fairs as well as the number of job offers extended. He explained to the members that hiring decisions, background checks, and fingerprinting are completed immediately.

It's important to note that the numbers presented may shift over the coming weeks as we have received reports that there have been a few "no shows" when the process is completed and a start date has been set.

Mr. Roth inquired about what CSSF staff is responsible for when collaborating with the County to establish the job fairs. Mr. Beasley advised that CSSF staff works with Miami-Dade County departments to identify needs; in addition, they identify locations, ensure adequate spacing for interviews, and conduct all community outreach.

Miami-Dade College has partnered with us to host several of the career fairs. The Executive Committee extends its sincerest appreciation for their willingness to assist with this project.

No further questions or comments were presented for consideration. Item closed.

5. Approval – Bean Automotive Apprenticeship

Vice-Chairman del Valle introduced the item; Mr. Beasley further presented.

A second cohort for the Bean Automotive Technician Specialist Apprenticeship was approved by the SFWIB at the August 18, 2022 meeting. Allocated funds, in the amount of \$215,250, will provide a 30 percent reimbursement for gross wages to Bean Automotive Group, LP., which includes 2,000 hours of On-the-Job-Training (OJT) for 25 apprentices.

In response to the success of the program and the increased competitiveness associated with recruitment, an increase in the starting wage was negotiated; participants will now earn \$16.00 per hour, receiving an additional \$0.50 increase upon completion of the first 1,000 hours. As the negotiated rates were authorized after initial approval from the SFWIB, CSSF staff recommends to the Executive Committee to recommend to the Board, an additional \$28,500 in WIOA funds to reimburse the wage increase to the Bean Automotive Group, LP.

Motion by Ms Ferradaz moved to approve additional WIOA funds for the Bean Automotive Apprenticeship Program.

Mr. Roth seconded the motion; **item is passed without dissent.**



Mr. Beasley clarified that Dr. Loynaz does not need to remove himself from the vote; although Miami Dade College does the training, funding goes to Bean Automotive directly.

Vice-Chair del Valle mentioned that he had the honor of attending the graduation of the first cohort. A remarkable event that truly made a difference in the lives of the participants and their families. Bean Automotive is truly behind the program and excited about being a partner in this effort.

Mr. Beasley reiterated the importance of apprenticeship programs, which allows the participant to learn and secure earnings for his/her family at the same time. Through an apprenticeship program, participants are gaining certifications and on the job training. In addition, the subsidizing of wages also accounts for reduced productivity; master mechanics are pulled off the line to help with the training new apprentices.

Ms. Ferradaz attested that Bean Automotive gives back a lot to the community as they have worked with the Foster Care community and other organizations.

Mr. Chi agrees with the program stating that there has been a huge gap between the educational system and actual workforce/industry. Mr. Beasley agreed and shared that several schools have submitted classroom-based programs for State approval that are not genuine apprenticeship programs. Employers want a hybrid approach where apprentices are trained both on the job and in class training with certification.

Mr. Beasley also shared a few of the new apprenticeship programs that will be starting soon.

No further questions or comments were presented for consideration. Item closed

6. Approval – South Florida Workforce Investment Board Membership Nominations

Vice-Chairman del Valle introduced the item; Mr. Beasley further presented.

Several SFWIB members have retired from their respective organizations thereby resigning from the Board; the individuals listed in the agenda packet were identified as replacements for those that have left – several of which are required positions.

Once approved by the Executive Committee, applications and referral packets will be forwarded to Mayor Levine-Cava for review, approval, and appointment.

Mr. Roth inquired about the replacements and how they were identified. Mr. Beasley explained that several of them are required positions by law and were the direct replacements of those that have retired. In addition, the law requires those that are on the Board to be in high-level positions in their agency, not just affiliated.

Mr. Beasley walked through each of the recommended replacements for members that have retired. He noted that Mexican American Council (MAC), which services Migrant Workers, should be updated to reflect that they are a Community Based Organization.

Mr. Roth asked if we are staying with MAC because it is required or if there are other agencies that can represent a community-based organization that services Migrant Workers. Mr. Beasley advised that there are other organizations that work with migrant workers; however, the SFWIB has an extensive relationship with MAC and they have a substantial reach in the community.

The State of Florida is not a heavy unionized city; we need to have at least three (3) represented on the Board. Mr. Beasley walked through the history of the Board make-up and its transition; ensuring that members represent one primary area vs. several.

Mr. Roth raised the idea that members of the Board should be approached about vacancies to allow them an opportunity to recommend replacements. Ms. Ferradaz also suggested that open vacancies be advertised to ensure we have adequate representation. The Executive Committee will evaluate any applicants submitted as well as any recommended individuals from SFWIB members. Mr. Beasley agreed to both suggestions.

Mr. Beasley reminded the members SFWIB approved individuals can be submitted to Mayor Cava, however, if she chooses, she can reject a suggested member and/or organization and appoint someone else.

There are a number of board openings coming up. Mr. Beasley will forward a current list of the Board members (indicating the categories assigned, the affiliated industries), the categories where there are openings, and suggest the industries that will be of benefit to the SFWIB moving forward.

Motion by Mr. Chi moved to approve to recommend the new/replacement SFWIB members to Mayor Cava for consideration and approval for placement.

Mr. Roth seconded the motion; **item is passed without dissent.**

No further questions or comments were presented for consideration. Item closed.

7. Approval – EconoVue Data Platform License Purchase

Vice-Chairman del Valle introduced the item; Mr. Beasley further explained and introduced Mr. Ulisse Gallo who conducted a presentation of the platform for the members.

The State of Florida purchased a number of licenses to the EconoVue™ platform and awarded them to select local workforce development boards. The contract with EconoVue, through the State, has since lapsed; SFWIB no longer has access. Recognizing the value of the EconoVue platform, SFWIB staff recommends that the SFWIB purchase 30 licenses directly which will be used by SFWIB contracted business entities, American Job Centers, and Career Development Centers as well as the SFWIB's internal Business Services Unit.

Mr. Gallo conducted a brief demonstration of the tool, highlighting the platform's ability to filter business data that will enable SFWIB staff and our contracted business entities to do targeted business outreach utilizing targeted, scaled down Dunn and Bradstreet data. A detailed presentation is available via the November 17, 2022 Executive Committee agenda packet.

Mr. Roth inquired about the cost of the product, the possible return on investment, and the reason thirty (30) licenses are needed. Mr. Gilbert confirmed the breakdown as:

- American Job Centers – 1 per location
- Career Development Centers – 1 per location
- SFWIB Business Intermediaries – 6
- CSSF Headquarters - 2

Mr. Gibson inquired about paying for service providers to access the tool. How do we monitor usage? Mr. Beasley explained that service providers are not currently using the tool and they do not have access. SFWIB staff will present service provider performance outcomes to the Executive Committee for review and approval before the tool is rolled out.

He walked through the history of the State's purchase of EconoVue and the limited access provided, which was primarily focused around Rapid Response. SFWIB purchase will provide full access to the tool.

Chairman Gibson agreed that the specificity of the data and the increased utilization of the tool is very valuable. The State is taking quite some time to make a decision on renewing the contract; by purchasing the licenses directly, SFWIB staff can start working with the tool immediately and begin targeting local businesses within the program year.

Mr. Roth asked how many other workforce regions in the state has purchased the platform directly and how often was the tool used when it was active with the State. Mr. Gallo advised that two other workforce boards are looking at it, but there have been no purchases to date. Through the State's contract, the Boards were utilizing the platform; averaging 80 log-ins per month.

Mr. Beasley reminded the Committee that the SFWIB's Layoff Aversion Program is unique in comparison to other state WDBs; we are the only board that offered a layoff aversion fund and contracted with the local businesses community to provide additional resources. Moving forward, the EconoVue tool will be used for layoff aversion, apprenticeships, outreach, and much more.

Motion by Chairman Gibson to approve the purchase of thirty (30) EconoVue licenses. Mr. Chi seconded the motion.

Mr. Roth dissented and voiced concern about the cost of the tool and the possible return on investment.

Chairman Gibson asked if there is an opportunity for the Board to receive better pricing. Mr. Gallo advised that reduced pricing is available; however, it would require a multi-year contract. The State of Florida had a three-year contract – the cost only increased slightly over time. In addition, Mr. Gallo advised that the EconoVue tool is not just a database but it is a GIS based-data base and there is a lot more behind the data that differentiates it from data mining.

Vice Chairman del Valle asked that the motion be withdrawn to give the Executive Director an opportunity to renegotiate and re-present in December.

Mr. Gibson and Mr. Chi withdrew the motion and will defer the item until the December Executive Committee Meeting.

Ms. Ferradaz asked if this is the first time we will be using the platform in our region. Mr. Beasley advised that we once had limited access via the state; however, the licenses SFWIB acquires will expand access to allow full use of the EconoVue tool.

Ms. Ferradaz requested that SFWIB staff get more information about the State's purchase and their return on investment.

No further questions or comments were presented for consideration. Item closed.

With no further business presented to the Committee, the meeting adjourned at 10:12 am.



SFWIB EXECUTIVE COMMITTEE

DATE: 12/8/2022

AGENDA ITEM NUMBER: 3

AGENDA ITEM SUBJECT: FISCAL AUDIT UPDATE

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRONG WORKFORCE SYSTEM LEADERSHIP**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

On October 20, 2022, the South Florida Workforce Investment Board (SFWIB) approved the execution of a one year contract with Anthony Brunson P.A. for the performance of an external independent audit of the agency's financial records and reports for Fiscal Year 2021-2022.

Anthony Brunson P.A. anticipates that the final audit report will be completed timely with no need for an extension. SFWIB staff will recommend to the Finance and Efficiency Council to recommend that the Executive Committee review and authorize the submission of the final audit report to the Federal Audit Clearing House.

FUNDING: N/A

PERFORMANCE: N/A

NO ATTACHMENT



SFWIB EXECUTIVE COMMITTEE

DATE: 12/8/2022

AGENDA ITEM NUMBER: 4

AGENDA ITEM SUBJECT: ECONOVUE™ POLICY

AGENDA ITEM TYPE: **INFORMATIONAL**

RECOMMENDATION: N/A

STRATEGIC GOAL: **STRENGTHEN THE ONE-STOP DELIVERY SYSTEM**

STRATEGIC PROJECT: **Strengthen workforce system accountability**

BACKGROUND:

In program year 2019-2020, The SFWIB through its Strategic Goal of Increasing Intergrated Service Delivery, created Business Service Teams consisting of SFWIB staff and Business Intermediaries from our chamber partners. In an effort to provide additional structure to the teams, staff developed a Rapid Response Policy. The policy provides guidance to staff as it relates to rapid response activities and introduced a tool called EconoVue™. EconoVue™ is an licensed intuitive data visualization platform that offers multi-dimensional views of a region's business, workforce, and sector data for targeted business outreach.

The EconoVue™ platform utilizes Bureau of Labor Statistics and Dun & Bradstreet data to help establish an early warning system to identify businesses, regardless of size, that may be at risk of closing. The platform is interactive and provides information on businesses, including labor market data, standard identity and demographic information regarding size, location and operations, business health, and change dynamics.

The EconoVue™ Policy will provide specific guidance to the Outreach Team, consisting of Business Services staff, American Job Centers (AJC's) and Business Intermediaries, on the utilization of the platform to ensure compliance by both staff and non-staff who utilize the platform under the SFWIB contracted licenses. The policy was drafted to ensure compliance with CareerSource Florida Administrative Policy Number 114: "Rapid Response Program Administration, Training and Employment Notice (TEN) 9-12: "Layoff Aversion in Rapid Response Systems" (August 31, 2012), and all applicable sections of the Workforce Innovation and Opportunity Act.

FUNDING: N/A

PERFORMANCE: N/A

ATTACHMENT



BOARD POLICY

**POLICY
NUMBER 000**

Title:	EconoVue Policy		
Effective:		Revised:	
Supersedes:		Version:	

I. OF INTEREST TO

This policy is applicable to CareerSource South Florida (CSSF), American Job Centers (AJC), Business Intermediaries, partners and service providers.

II. PURPOSE AND SCOPE

The purpose of this policy is to provide guidance on the use of the EconoVue data platform to conduct business outreach and engagement by the CSSF Business Services team, the AJC's and Business Intermediaries.

III. BACKGROUND

EconoVue provides effective, efficient and targeted business outreach for employer assistance and engagement through the use of informed data. EconoVue's intuitive data visualization platform is built on the geographic boundaries of workforce development boards, mapping and providing business and jobs data from a geography view foundation at the local workforce level, and integrating all additional data, including proprietary business health and risk data, wage data, and job posting details at a company level.

IV. STATUTORY AUTHORITIES

- Workforce Innovation and Opportunity Act, §Section 134(d)(1)(A)(ix)(II)(cc).
- Workforce Innovation and Opportunity Act Final Rule, 20 CFR 682.320.
- Workforce Innovation and Opportunity Act Final Rule, 20 CFR 682.340.
- Training and Employment Guidance Letter (TEGL) 19-16: "Guidance on Services provided through the Adult and Dislocated Worker Programs and the Wagner-Peyser Act Employment Services" (March 1, 2017).
- Training and Employment Guidance Letter (TEGL) 26-14: "Workforce Innovation and Opportunity Act Transition Authority for Flexible Use of State Rapid Response Funds" (April 14, 2015).

- Training and Employment Notice (TEN) 9-12: “Layoff Aversion in Rapid Response Systems” (August 31, 2012).
- CareerSource Florida Administrative Policy Number 114: “Rapid Response Program Administration”

V. DEFINITIONS

1. American Job Center (AJC)

The American Job Center network, part of the One-Stop system, provides universal access to an integrated array of labor exchange services so that workers, job seekers, and employers can find the services they need. The Wagner-Peyser Employment Service focuses on providing a variety of services including job search assistance, help getting a job referral, and placement assistance for job seekers. Additionally, re-employment services are available for unemployment insurance claimants, as well as recruitment services to employers with job openings. Services are delivered in one of three modes including self-service, facilitated self-help services and staff assisted service delivery approaches.

The services offered to employers, in addition to referral of job seekers to available job openings, include assistance in development of job order requirements, matching job seeker experience with job requirements and skills, assisting employers with special recruitment needs, arranging job fairs, assisting employers analyze hard-to-fill job orders, assisting with job restructuring, and helping employers deal with layoffs. Job seekers who are veterans receive priority referrals to jobs and training as well as special employment services and assistance. In addition, the system provides specialized attention and service to individuals with disabilities, migrant and seasonal farm-workers, justice-involved individuals, youth, minorities, and older workers.

2. Business Intermediaries

Local Chambers of Commerce and economic development organizations are uniquely positioned to assist small businesses as a result of their continuing engagement, partnership, and relationship-building activities within the businesses community. CareerSource South Florida (CSSF) is partnering or contracting with these business-focused organizations to provide ongoing engagement, partnership, and relationship-building activities with business in the community.

3. EconoVue Data Platform

A licensed data visualization and business outreach platform using Dun & Bradstreet data and integrating Bureau of Labor Statistics, Indeed.com job postings, and other workforce data for all business locations in the workforce development area, including standard identity and demographic information around size, location and operations, business health, and change dynamics.

4. Unique Business

A unique business is one that has received outreach or other services for the first time by one of the AJC’s or Business Intermediaries.

VI. POLICY

The EconoVue Data platform is a targeted business outreach tool that can be employed by Business Services, the AJC's, and Business Intermediaries. EconoVue enables data-driven outreach and engagement for better program success and performance metrics. Utilizing Bureau of Labor Statistics and Dun & Bradstreet data, EconoVue provides information on business locations, including standard identity and demographic information around size, location and operations; specialty business data including business health and change dynamics; executive and human resources contact details, custom geo-data, jobs, labor and occupation data; and time-series trend data in key dimensions designed to anticipate, prepare for, and manage the economic changes of businesses throughout the business lifecycle (expansion through contraction).

1. Business Contraction

By using EconoVue to identify businesses that are "at-risk" and contracting, a pro-active approach can be taken to assist those businesses in managing any reductions in workforce by conducting assessments of their needs and delivering services to address those needs. Services and strategies may include providing information and referrals to Short Time Compensation programs, CareerSource South Florida (CSSF) training assistance programs, CSSF layoff aversion funds, the Small Business Development Center at Florida International University, Small Business Administration (SBA) program information, and information about other state and federal assistance programs.

2. Stable Businesses

Identifying Businesses that are stable and at low risk of failure presents an opportunity to provide ongoing services and maintain engagement with those businesses, increasing business retention. Outreach to stable businesses provides an opening to educate the business about CSSF services, including recruitment, training, and Federal incentives such as Work Opportunity Tax Credits and the Federal Bonding program. Businesses identified may participate in business roundtable discussions for their industry sector. By identifying trends within industry sectors, pro-active adjustments of resources may be made, training programs evaluated, and solutions developed to address specific issues.

3. Growth Businesses

Identifying businesses that are in growth mode presents opportunities to provide services such as specialized recruitments; training services including On-the-Job Training (OJT), Incumbent Worker Training (IWT); Youth Services including Paid Work Experience; as well as Pre-Apprenticeship and Apprenticeship programs.

4. Minority Businesses

Minority-owned businesses can be identified utilizing EconoVue's advanced filters. By targeting minority-owned businesses, AJC's can provide specific services to targeted populations such as Veterans. Veterans and eligible spouses receive priority of services from the AJC's. Veteran-owned businesses may be more knowledgeable about the specific skill sets that veteran's offer, thereby increasing the hiring probabilities. Work opportunity tax credits may be available to the businesses.

A targeted data-driven business outreach program is a more effective use of staff, provides on-going employer engagement, and increased knowledge of industry sector needs, resulting in an increase in services provided and repeat businesses served.

VII. Limitations

None.

VIII. EXCEPTIONS

Exceptions to this policy, or any part thereof, must be approved in writing by the SFWIB Executive Director.



PROCEDURES

**PROCEDURES
NUMBER 000**

Title:	EconoVue		
Effective:		Revised:	
Supersedes:		Version:	

I. PURPOSE

Establishes the operational procedures for the use of the EconoVue data platform for Business Outreach by the Career Source South Florida (CSSF) Business Services Team, American Job Centers (AJC) and contracted Business Intermediaries, collectively referred to as the Outreach Team. Business Intermediaries include Chambers of Commerce and other economic development organizations.

II. BACKGROUND

EconoVue provides effective, efficient and targeted business outreach for employer assistance and engagement through the use of informed data. EconoVue's intuitive data visualization platform is built on the geographic boundaries of workforce development boards, mapping and providing business and jobs data from a geography view foundation at the local workforce level, and integrating all additional data, including proprietary business health and risk data, wage data, and job posting details at a company level. EconoVue is the only platform that tracks businesses of all size from sole proprietorships to large, multi-national companies across all sectors.

The South Florida Workforce Investment Board (SFWIB) d/b/a CareerSource South Florida (CSSF) Business Services Team, AJC's and Business Intermediaries, in an effort to support small businesses and conduct outreach to businesses, will use the EconoVue platform to identify and target businesses and industry sectors.

III. OVERVIEW

CSSF shall establish an Outreach Team consisting of the CSSF Business Services Team, the AJC's, and Business Intermediaries. The Outreach Team will concentrate their efforts on the following:

- a. Utilize the EconoVue system to identify businesses that are considered high risk to provide outreach and education regarding the provision of comprehensive, employer-based Layoff Aversion services to include Short-Time Compensation, federal

emergency grant and loan programs, local and community assistance programs.

- b. Utilize the EconoVue system to identify businesses that are stable to outreach and educate regarding the services offered by CSSF including recruitment, training incentives and federal incentives.
- c. Utilize the EconoVue system to identify businesses that are growing and may benefit from On-the-Job Training (OJT), Incumbent Worker Training (IWT), Youth Services including Paid Work Experience; as well as Pre-Apprenticeship and Apprenticeship programs.
- d. Utilize the EconoVue system to identify Minority-owned businesses
- e. Define service level standards to include performance metrics of business penetration, market share and repeat businesses served.

IV. ACRONYMS

V. PROCEDURES

- a. CSSF Business Services team, designated users at the AJC's, and designated users at the Business Intermediaries agency, collectively referred to as the Outreach Team, shall be required to attend training to learn how to use the EconoVue platform through EconoVue's virtual and on-line trainings sessions.
- b. The EconoVue platform will be used to develop targeted lists of business using filters specific to the desired results.
- c. Using information obtained through EconoVue, outreach will be conducted to a minimum number of unique businesses per month as specified for each member of the Outreach Team.
- d. The Outreach Team will establish contact with the businesses and secure executive level commitment to work together.
- e. The Outreach Team will develop strategies to assist those businesses that are committed to working together. A strategy may include (but is not limited to) one or more of the following:
 - I. Assisting employers in managing reductions in workforce, which may include early identification of firms at risk of layoffs, assessment of the needs of and options for at-risk firms, and the delivery of services to address these needs;
 - II. Funding feasibility studies to determine if a company's operations may be sustained through a buyout or other means to avoid or minimize layoffs;
 - III. Connecting companies to state Short-Time Compensation or other programs designed to prevent layoffs or to quickly reemploy dislocated workers, employer loan programs for employee skill upgrading; and other Federal, state and local resources as necessary to address other business needs;
 - IV. Establishing linkages with economic development activities at the Federal, State and local levels, including Federal Department of Commerce programs and available State and local business retention and expansion activities;

- V. Conducting analyses of the suppliers of an affected company to assess their risks and vulnerabilities from a potential closing or shift in production of their major customer;
 - VI. Engaging in proactive measures to identify opportunities for potential economic transition and training needs in growing industry sectors or expanding businesses;
 - VII. Coordinate with local government divisions and organization, and local nonprofit organizations, to plan for and respond to natural and other disasters;
- f. The Outreach team will identify and provide specific information on services and programs that could help deliver solutions to address the business's needs.
 - g. The Outreach team shall conduct at least one follow-up with all businesses assisted within 90 days of last service provided.
 - h. These procedures apply to all CSSF partnering agencies that have been provided with the EconoVue platform license

VI. .LIMITATIONS/PROHIBITIONS

Business Intermediaries are **NOT** authorized allocate or make a promise of financial assistance on behalf of CSSF.

VII. RESPONSIBILITIES

- a. CSSF shall provide the license for the EconoVue platform to the Outreach Team in order to identify businesses or sectors experiencing challenges or expanding.
- b. Business Intermediaries shall be responsible for utilizing EconoVue to identify businesses and industry sectors that are at-risk, stable, or growing and deliver services, strategies and solutions to the business's needs.

VIII. FREQUENTLY ASKED QUESTIONS (FAQ)

IX. EXCEPTIONS

Exceptions to this policy, or any part thereof, must be approved in writing by the SFWIB Executive Director.

X. DEFINITIONS

a. EconoVue Data Platform

A licensed data visualization and business outreach platform using Bureau of Labor Statistics and Dun & Bradstreet data that provides information on business

locations, including standard identity and demographic information around size, location and operations, business health and change dynamics.

b. Incumbent Worker Training Program

The Incumbent Worker Training (IWT) Program is to provide grant funding for continuing education and training of incumbent employees at existing Florida businesses. The program will provide reimbursement grants to businesses that pay for pre-approved, direct, training related costs. The program helps established Florida businesses upgrade the skills of their current employees.

c. Layoff Aversion

A continuum of strategies targeted to specific employers or industries that are experiencing a decline and have the potential to undergo layoffs, or are experiencing a serious skills gap that impacts their ability to compete and retain workers. A layoff is considered to be averted when:

- A worker's job is saved at an existing employer facing a risk of downsizing or closing; or
- A worker at risk of dislocation faces a brief gap or unemployment when transitioning to a different job with the same employer or is hired at a new job with a different employer.

d. On the Job Training (OJT)

On the Job Training (OJT) is designed to provide resources for occupational training and development of eligible, prospective, full-time hires by helping to defray the cost of training. Businesses may recoup a percentage of the wages paid to each new hire during the agreed-upon training period.

e. Paid Work Experience (PWE)

Paid Work Experience (PWE) provides a business with workers for a specified period of time to gain work experience. The salary of the worker is paid, at no cost to the business, during the term of the agreement. This incentive allows new worker(s) to gain job-specific skills, while helping the business increase productivity.

f. Short-Time Compensation

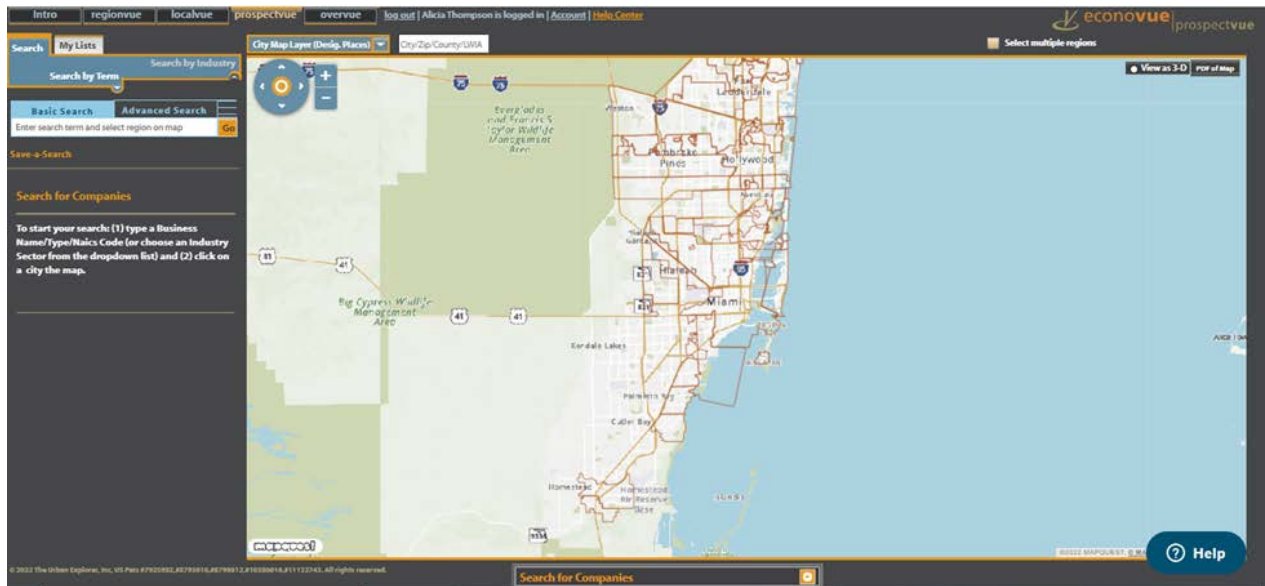
The Short Time Compensation program helps employers retain their workforce in times of temporary slowdown by encouraging work sharing as an alternative to layoff. The program permits prorated reemployment assistance benefits to employees whose work hours and earnings are reduced as part of a Short Time Compensation plan to avoid total layoff of some employees.

XI. RESOURCES

ECONOVUE EXAMPLE



1. Select ProspectVue from the tabs at the top of page

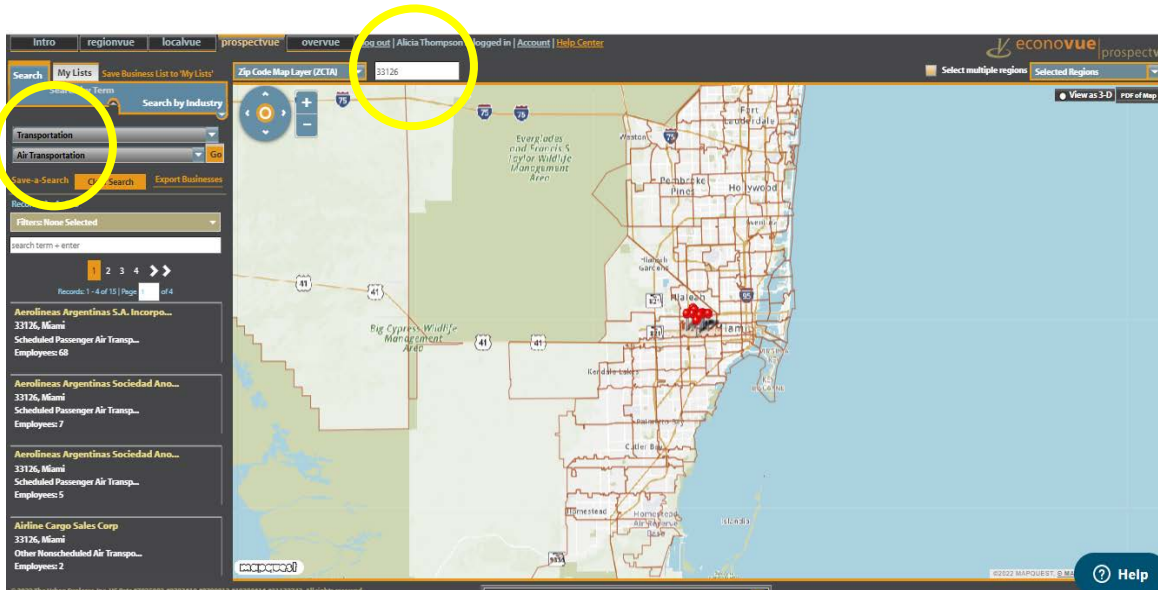


2. Select Search Criteria:

Example: Search by Industry Sector and zip code.

Industry Sector: Transportation Industry, Air Transportation

Zip Code: 33126



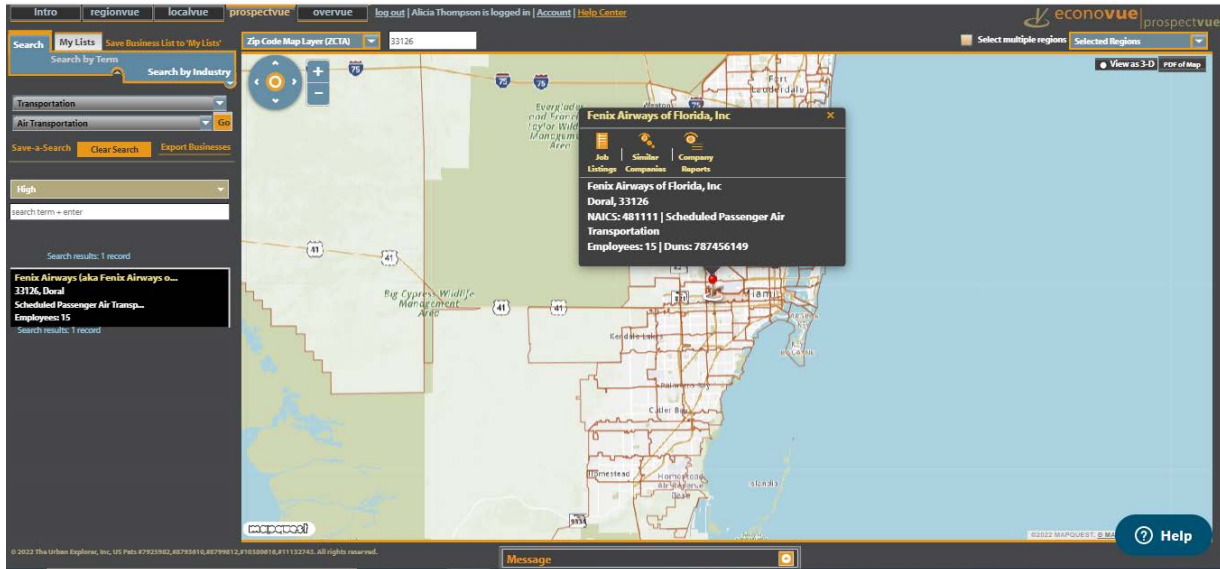
3. Select Filters. Filter by Financial Stress Index – High.

The screenshot shows the prospectvue web application interface. On the left sidebar, the 'Financial Stress Index' filter is expanded, and the 'High' option is selected. A yellow arrow points to this selection. The main map area displays a geographic view of Miami, Florida, with several red pins indicating search results. The top navigation bar includes 'Intro', 'regionvue', 'localvue', 'prospectvue', and 'overview'. The search bar at the top left contains '33126'. The bottom of the interface shows a 'Search for Companies' button and a 'Help' icon.

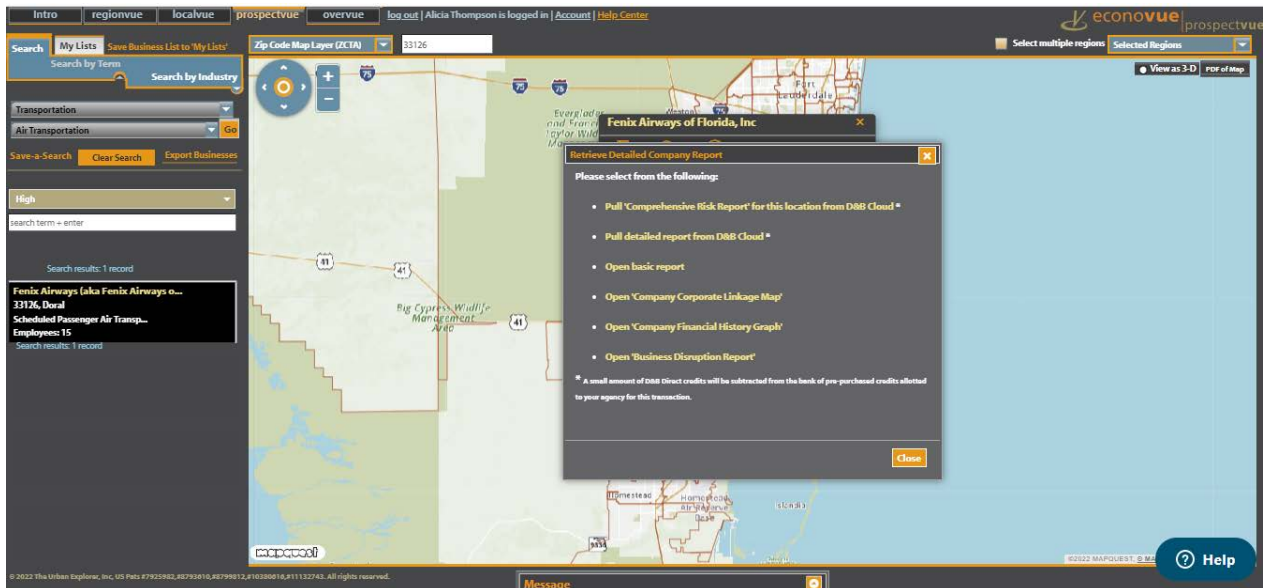
4. Results of filter

The screenshot shows the same prospectvue interface as in step 3, but now displaying search results. The 'Financial Stress Index' filter is still set to 'High'. The search results list on the left sidebar shows one record: 'Fenix Airways (aka Fenix Airways o... 32176, Doral Scheduled Passenger Air Transp... Employees: 15'. The map area shows a more detailed view of Miami with a higher density of red pins representing the search results. The top navigation bar and search bar remain the same.

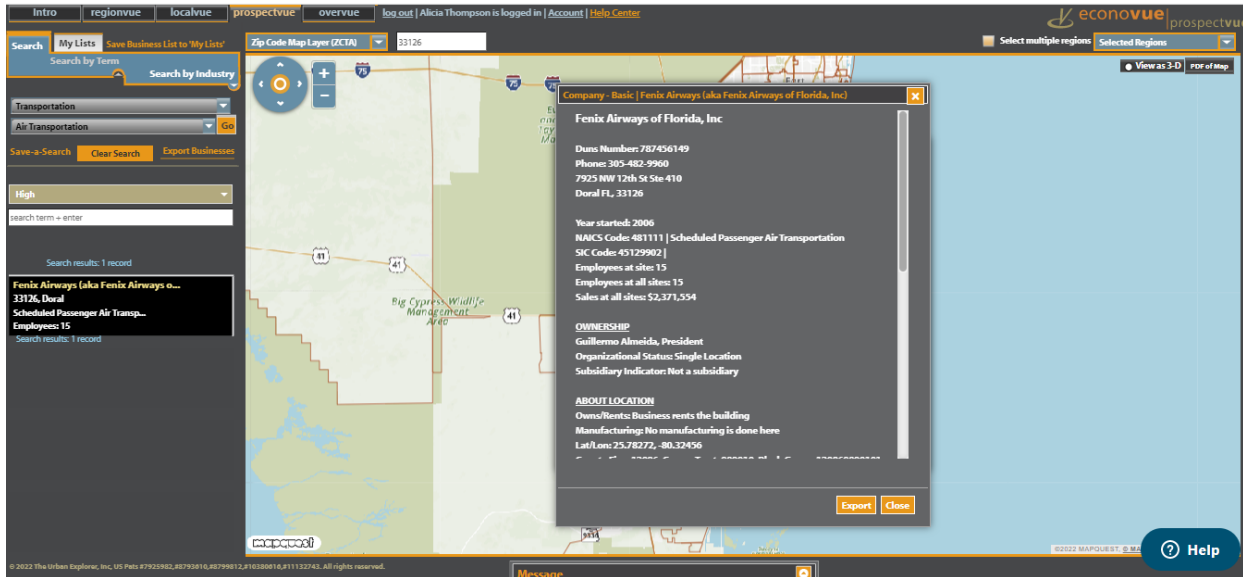
5. Click on company to bring up company information box. Select Company Reports



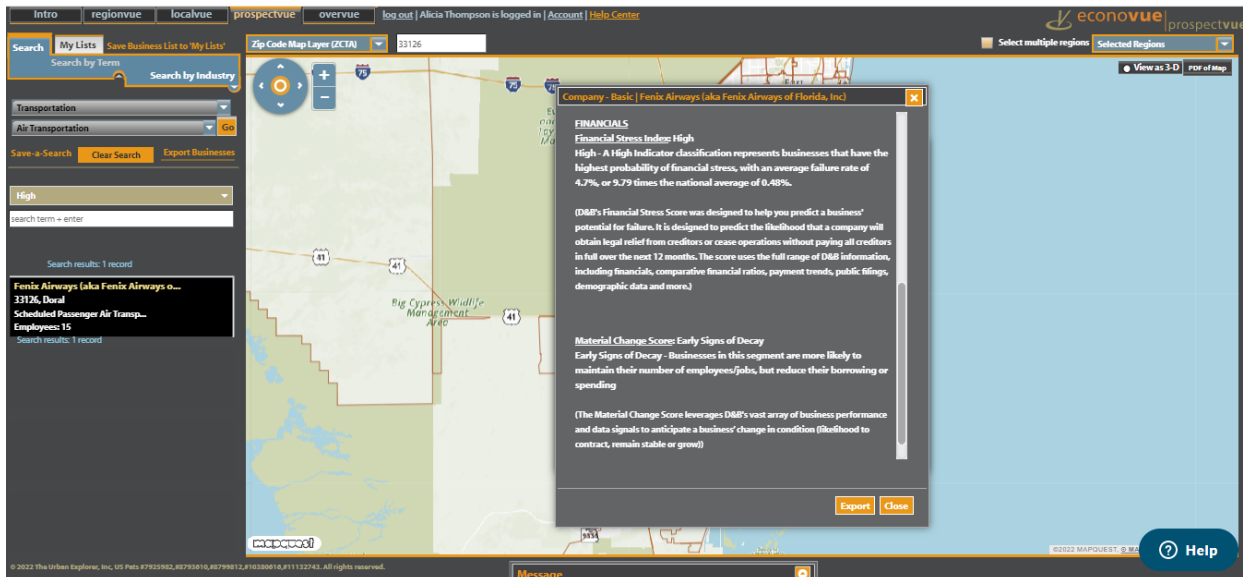
6. Select Open Basic Report



7. Basic Report contains contact information, ownership information, and.....

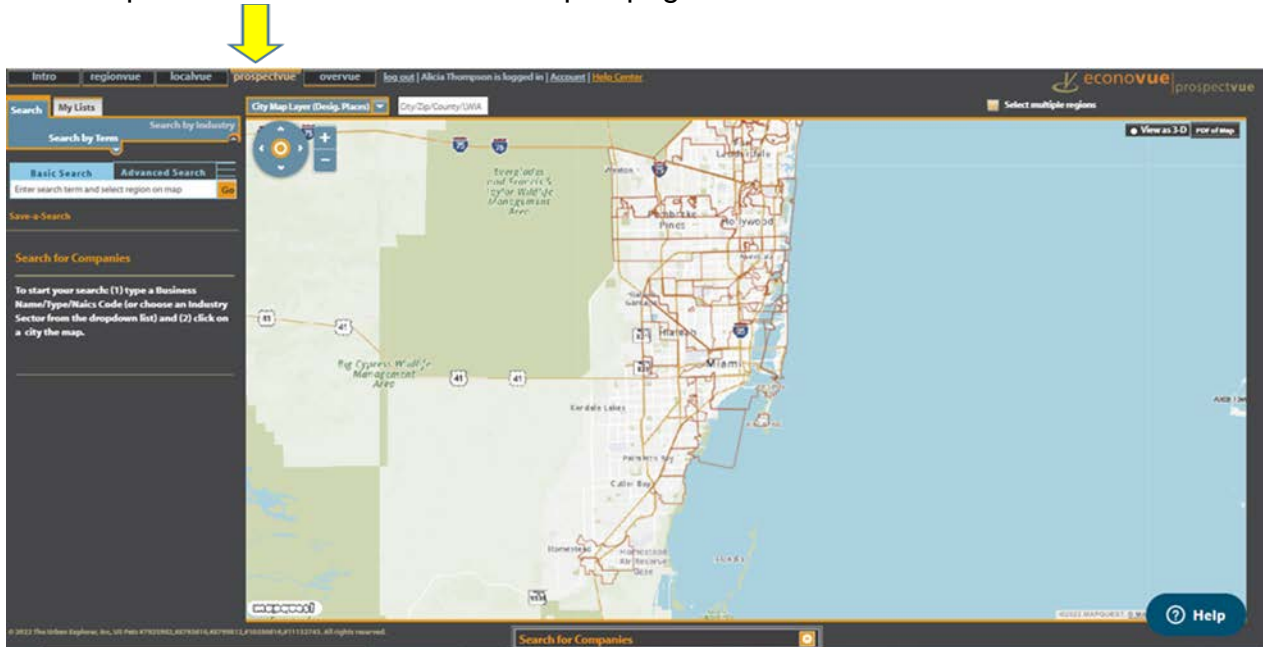


8. (scroll down), the financial stress index and material change score. In this example the financial stress index is high and the material change score shows early signs of decay. This is an example of a business that could benefit from layoff aversion strategies.



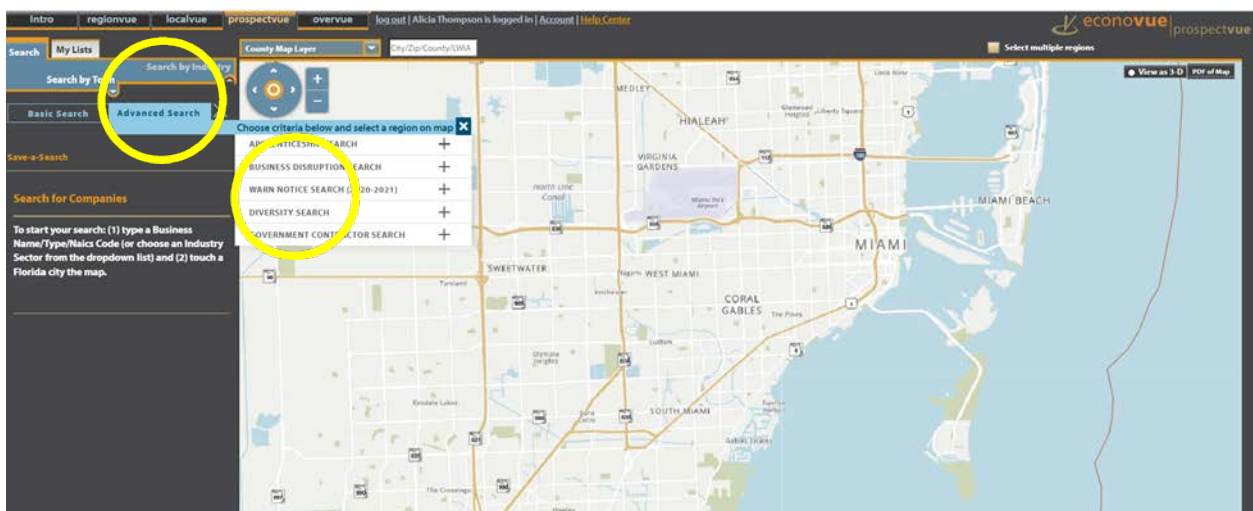
ECONOVUE EXAMPLE 2 Veteran Owned Business

1. Select ProspectVue from the tabs at the top of page



2. Select Search Criteria:

Example: Search by Advanced Search, Diversity Search.



3. Additional search criteria: Veteran Owned and City level (Doral)

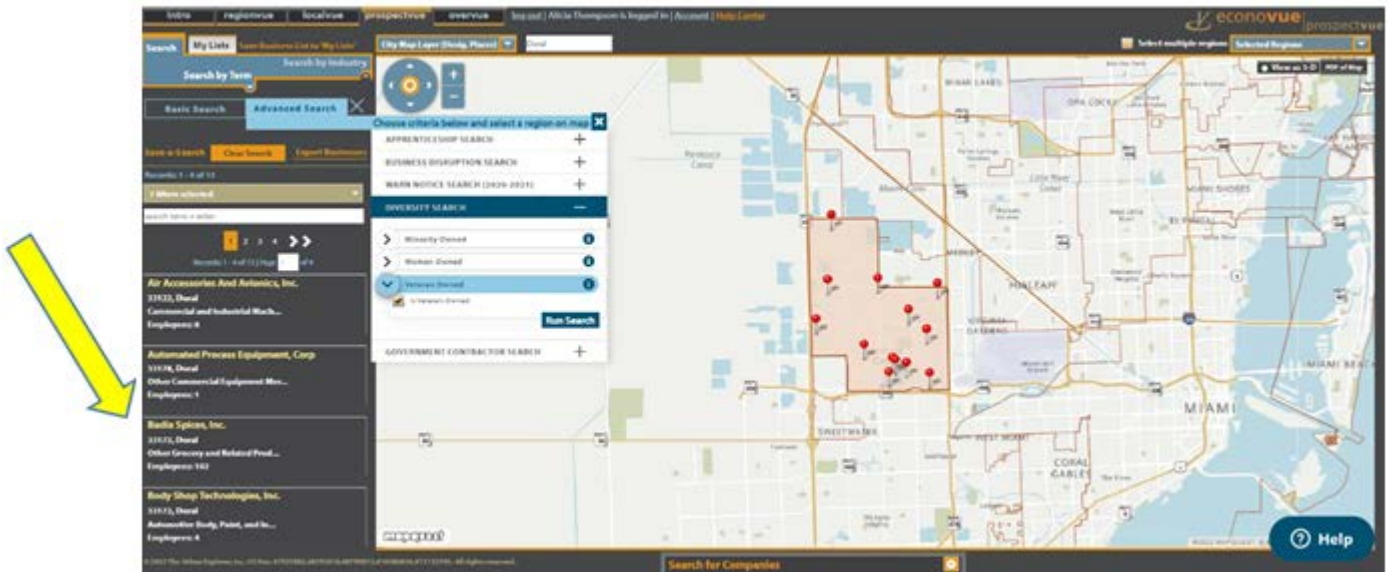
RESULTS

The screenshot shows the Prospectivue search interface. On the left, there is a sidebar with search options and a list of results. The main area features a map of Miami with several red pins indicating search results. The search filters are visible, including 'City Map Layer (Doral, FL)' and 'DIVERSITY SEARCH' with 'Veteran Owned' selected. A yellow arrow points to the word 'RESULTS' on the left. Two yellow circles highlight the 'City Map Layer (Doral, FL)' dropdown menu at the top and the 'Veteran Owned' checkbox in the 'DIVERSITY SEARCH' section.

4. Select Filters: Scroll to select Financial Stress Score—Low, Material Change Score—Growing

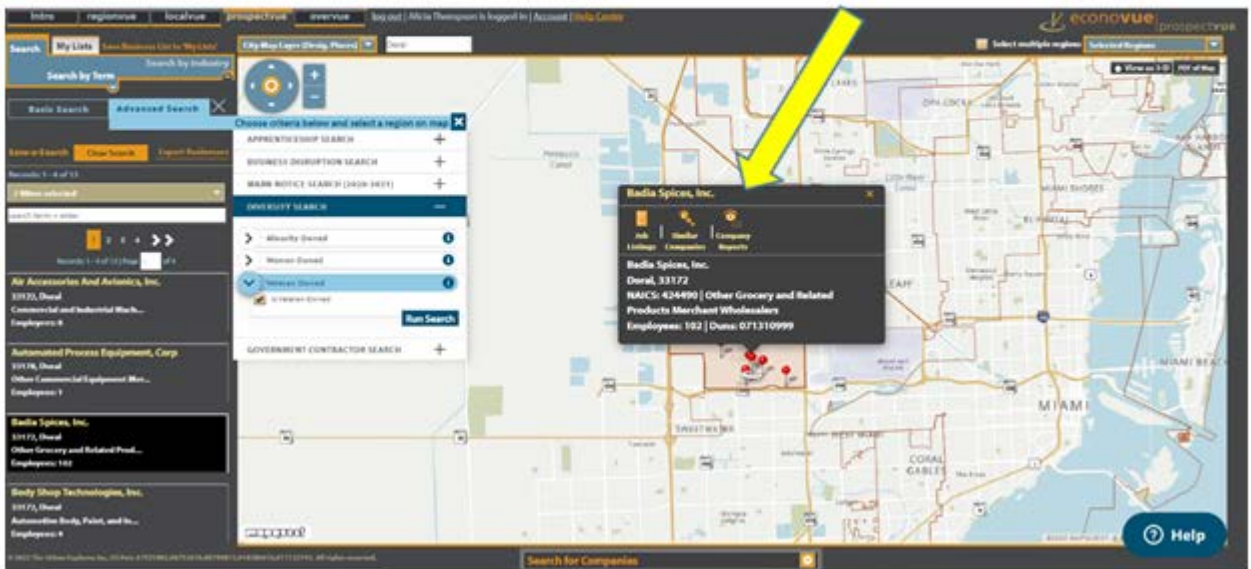
The screenshot shows the Prospectivue search interface with advanced filters. The 'Material Change Score' filter is selected, and the 'Leverage for Growth' checkbox is checked. A yellow arrow points to the 'Material Change Score' filter. Another yellow arrow points to the 'Leverage for Growth' checkbox in the 'Material Change Score' section.

5. Results of filter

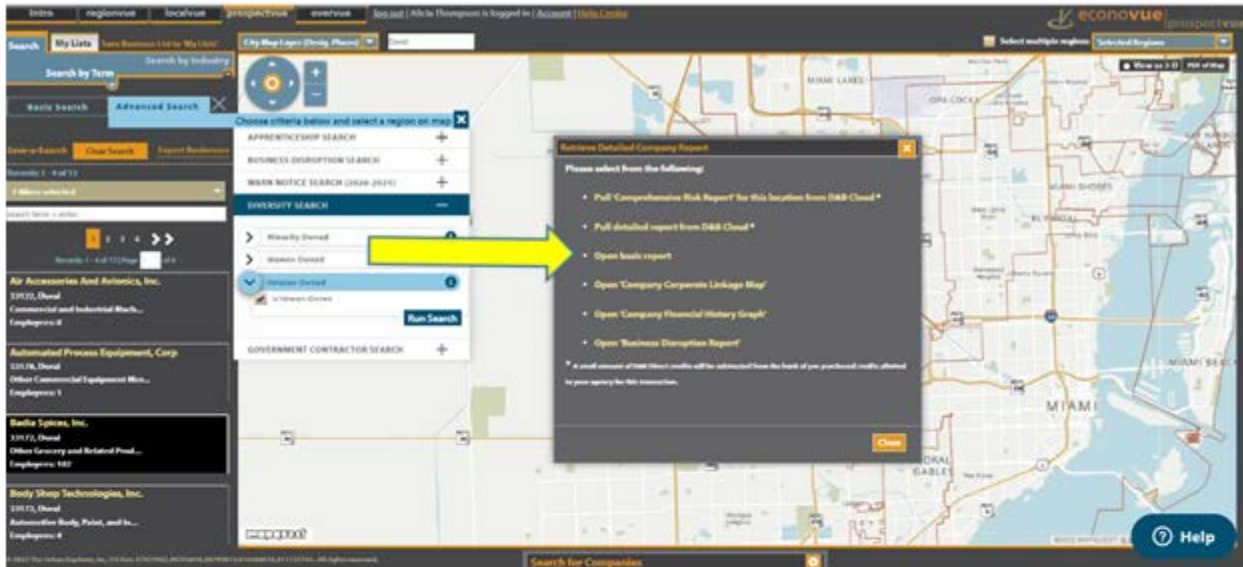


6. Select business—either from the list or hover over the pins to select

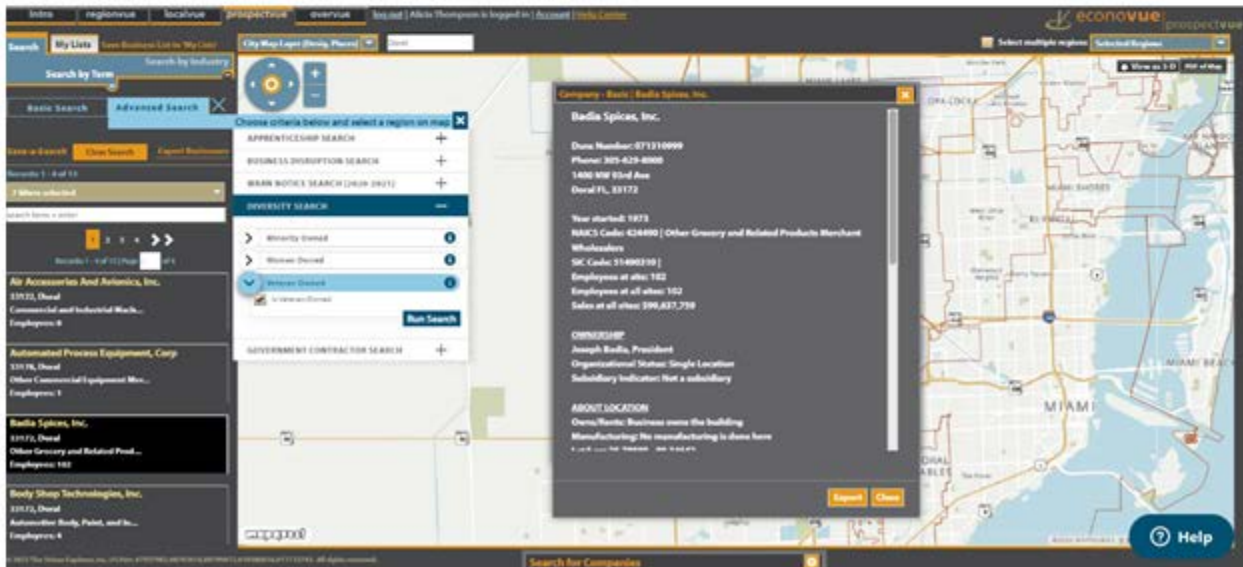
7. Select Company Reports



8. Select Open Basic Report



9. Basic Report contains contact information, ownership information, and.....



10. (scroll down), the financial stress index and material change score. In this example the financial stress index is low and the material change score shows spend growth. This is an example of a business that may be expanding and adding employees.

The screenshot displays the ECONOVUE prospective web application interface. The top navigation bar includes links for 'Intro', 'regionalvue', 'localvue', 'prospective', and 'overview', along with a user profile for 'Alice Thompson'. The main content area is divided into several sections:

- Search Section:** Includes a search bar, 'My Lists', and options to 'Save Business List for My User' and 'Search by Industry'.
- Search Filters:** A sidebar on the left contains 'Basic Search' and 'Advanced Search' tabs. Under 'Advanced Search', there are several filter categories: 'APPRENTICESHIP SEARCH', 'BUSINESS DISRUPTION SEARCH', 'WISN INDEX SEARCH (2020-2023)', and 'DIVERSITY SEARCH'. The 'DIVERSITY SEARCH' filter is expanded, showing options for 'Minority Owned', 'Women Owned', 'Veteran Owned', and 'Hispanic Owned'. Below this is a 'GOVERNMENT CONTRACTOR SEARCH' filter.
- Search Results:** A list of search results is shown on the left, including 'Air Accessories And Avionics, Inc.', 'Automated Process Equipment, Corp', and 'Bebe's Spices, Inc.'.
- Company Profile:** A modal window is open for 'Bebe's Spices, Inc.'. It displays the following information:
 - FINANCIALS:** Financial Stress Index: Low. A Low Indicator classification represents businesses that have the lowest probability of financial stress, with an average failure rate of 0.12%, vs. a national average failure rate of 0.49%.
 - Material Change Score: Spend Growth:** Spend Growth - Businesses in this segment are more likely to increase their spending, purchase total employment numbers, and maintain or expand their borrowing.
 - Disclaimer:** (The Material Change Score leverages IBM's real-time analysis of business performance and data signals to anticipate a leader's change in condition (likelihood to contract, revenue stable or grow).



SFWIB EXECUTIVE COMMITTEE

DATE: 12/8/2022

AGENDA ITEM NUMBER: 5

AGENDA ITEM SUBJECT: ECONOVUE™ DATA PLATFORM LICENSE PURCHASE

AGENDA ITEM TYPE: **APPROVAL**

RECOMMENDATION: SFWIB staff recommends to the Executive Committee to recommend to the Board the approval to allocate an amount not to exceed \$141,558.50 per year for two (2) years in Workforce Innovation and Opportunity Act (WIOA) funds for the EconoVue™ Data Platform, as set forth below.

STRATEGIC GOAL: **BUILD DEMAND-DRIVEN SYSTEM W/ EMPLOYER ENGAGEMENT**

STRATEGIC PROJECT: **Develop integrated Business Service teams**

BACKGROUND:

EconoVue™ is a licensed data visualization and business outreach platform using Bureau of Labor Statistics and Dun & Bradstreet® (D&B) data that provides information on business locations, including standard identity and demographic information around size, location and operations, business health and change dynamics, enabling data-driven outreach and engagement for better program success.

The EconoVue™ Data platform license has been an invaluable tool for the South Florida Workforce Investment Board (SFWIB). The data analytics can be used for targeted Business Development and Industry Sector analysis. By using EconoVue™ to identify businesses that are “at-risk” of failure, a pro-active approach can be taken to lay-off aversion. Appreciating the usefulness of the data platform, the SFWIB has developed policy and procedures for the use of EconoVue™ by SFWIB contracted business entities for the purposes of business outreach and lay-off aversion.

The State of Florida purchased 82 licenses to the EconoVue™ platform and awarded them to select local workforce development boards. The State of Florida allowed the contract with EconoVue to lapse, which caused the SFWIB’s access to be severed due to the lapse. Recognizing the value of the EconoVue™ platform, SFWIB staff recommends that the SFWIB purchase 30 licenses directly. The licenses will be utilized by SFWIB contracted business entities, American Job Centers, and Career Development Centers as well as the SFWIB’s internal Business Services Unit.

Contract Year	DEO Contract Specifications			CSSF Contract Specifications		
	Amount	Licenses	Cost Per License	Amount	Licenses	Cost Per License
FY2021-22	\$ 492,201.00	82	\$ 6,002.45			
FY2022-23	\$ 506,227.00	82	\$ 6,173.50	\$ 141,558.50	30	\$ 4,718.62
FY2023-24	\$ 519,253.00	82	\$ 6,332.35	\$ 141,558.50	30	\$ 4,718.62
	\$1,517,681.00		\$ 6,169.43	\$ 283,117.00		\$ 4,718.62

The EconoVue™ workforce development and business engagement solution encompasses several data features that are proprietary and only available from EconoVue™, D&B, and the D&B Data Cloud. The patented EconoVue™ user interface with the D&B Data Cloud, which provides real-time insights and intelligence, makes EconoVue™ a sole source provider.

The utilization of EconoVue™ by the SFWIB Outreach Team will justifiably increase our market share and REACH Act and the Department of Labor performance metrics. Using EconoVue™, the REACH Act performance metrics for fiscal year 2022-2023 of Year-over-Year Business Penetration will increase from 12,000 to 20,000 businesses served or 25% of the businesses served in the state of Florida. This also represents 8% of the businesses identified in EconoVue™ for LWDA 23. Additionally, the metrics for Continued Repeat Business will increase to 13,000 repeat businesses served, achieving the REACH Act goal of 35%.

The chart below outlines prior year and projected performance metrics:

LWDB 23 Projected REACH ACT Performance			
Business Penetration Rate	Numerator	Denominator	Rate (%)
PY 2020-2021 Actual Performance	10,479	75,381	13.90%
PY 2021-2022 Actual Performance	12,881	72,872	17.68%
PY 2022-2023 Projected Performance	20,000	79,991	25.00%
Continued Repeat Business-Level 1 Services			
Continued Repeat Business-Level 1 Services	Numerator	Denominator	Rate (%)
PY 2021-2022 Actual Performance	8,258	36,493	23%
PY 2022-2023 Projected Performance	13,000	30,202	43%
EconoVue™ Local Market Penetration Rate Performance			
LWDA 23 Market Share	Numerator	Denominator	Rate (%)
PY 2021-2022 Actual Performance	12,881	250,000	5.15%
PY 2022-2023 Projected Performance	20,000	250,000	8.00%

In following the procurement process of Miami-Dade County, Administrative Order No. 3-38, it is recommended that SFWIB waive the competitive procurement as it is recommended by the Executive Director that this is in the best interest of SFWIB. A two-thirds (2/3) vote of the quorum present is required to waive the competitive procurement process and award an allocation not to exceed \$141,558.50 per year for two (2) years in Workforce Innovation and Opportunity Act funds for the purchase of EconoVue™ Data platform licenses.

FUNDING: Workforce Innovation and Opportunity Act

PERFORMANCE: N/A

NO ATTACHMENT

Dun & Bradstreet Business Data Intelligence Driven Workforce Solutions



Dun & Bradstreet
in Partnership with Urban Explorer, Inc

dun & bradstreet

Proposal Sections

I.	Confirming Key Aspects of WIOA	3
II.	Linking Dun & Bradstreet (D&B) to WIOA activities	6
II.	<u>Data & Content</u>	14
IV.	<u>Workforce Solution Deliverables</u>	15
IV.	<u>Investment</u>	25
V.	Our Unique Solution	28

Confirming Key Aspects of WIOA

The Workforce Innovation & Opportunity Act (WIOA)

On July 22, 2014, President Barack Obama signed the Workforce Innovation and Opportunity Act (WIOA) into law. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy.

WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. The Act took effect on July 1, 2015. The WIOA state unified and local plans and the WIOA performance accountability provisions will take effect on July 1, 2016.

Key Highlights of WIOA – The Worker & Employer

A few of the key highlights of WIOA, include:

1. Requires States to Strategically Align Workforce Development Programs
2. Promotes Accountability and Transparency: WIOA ensures that Federal investments in employment and training programs are evidence-based and data-driven, and accountable to participants and taxpayers.
3. Fosters Regional Collaboration: WIOA promotes alignment of workforce development programs with regional economic development strategies to meet the needs of local and regional employers.
4. Improves Services to Employers and Promotes Work-Based Training: WIOA contributes to economic growth and business expansion by ensuring the workforce system is job-driven matching employers with skilled individuals.
5. Streamlines and Strengthens the Strategic Roles of Workforce Development
6. Boards: WIOA makes state and local boards more agile and well-positioned to meet local and regional employers' workforce needs.

Linking D&B to Key WIOA Activities

D&B is the world leader of providing employer-based content for establishing meaningful relationships

Dun & Bradstreet is uniquely positioned to provide the CareerSource South Florida and all local/regional partners with reliable and actionable data to confidently interact with over **256,502 employer locations** throughout the Region.



FOUNDATIONAL INFORMATION ON A BUSINESS

- Location & Phone
- Size (Emp & Sales)
- Legal Status
- Industry (NAICS & SIC)
- GEO (Lat & Long)
- Contacts



CORPORATE LINKAGE & PEOPLE CONNECTIONS

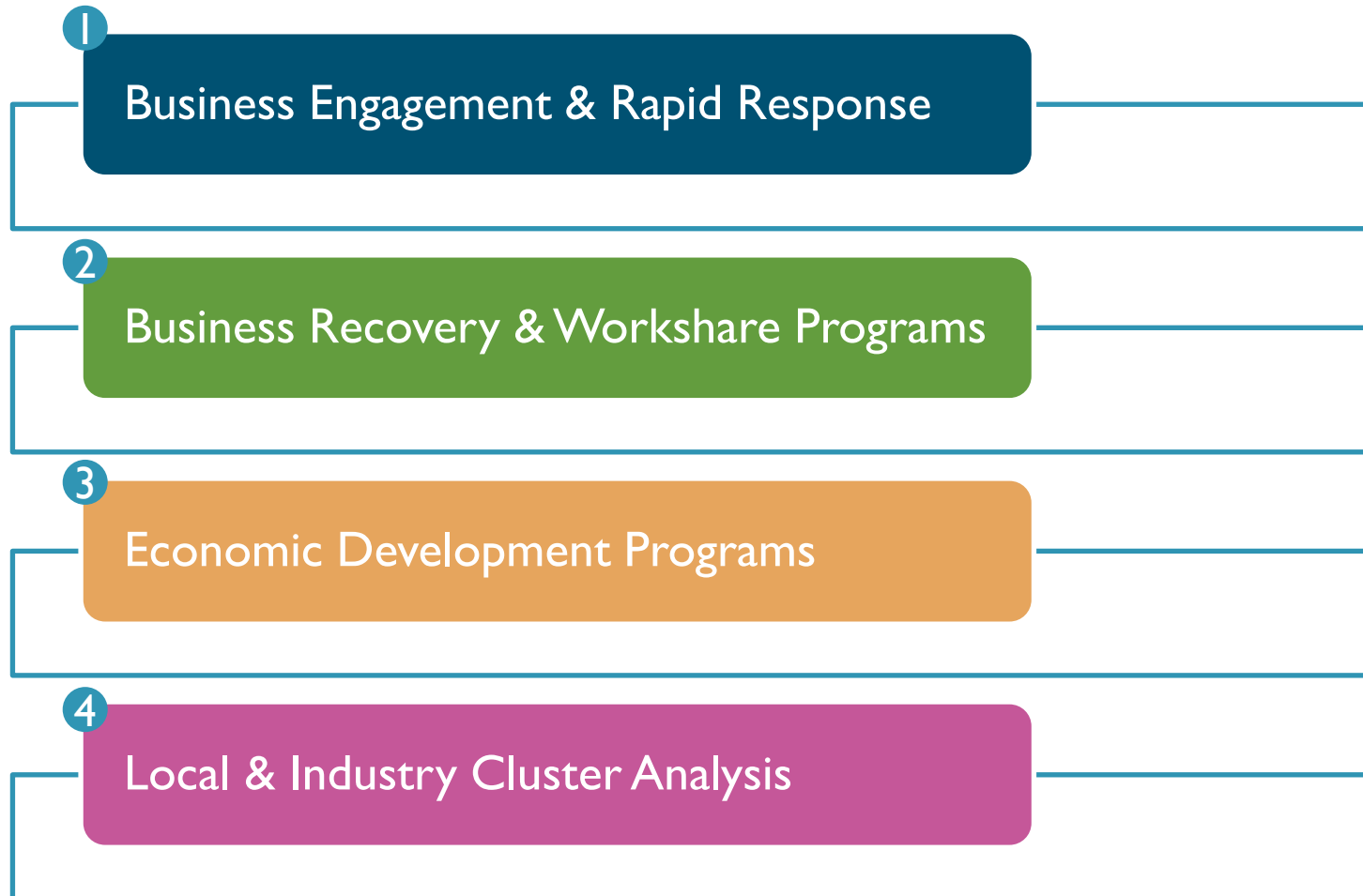
- Hierarchy & Global Ultimate DUNS
- Linking People to Businesses
- Linking branch locations to HQ



PREDICTIVE DATA & INSIGHTS

- Financial Information
- Trade Activity (HCs & TPs)
- Financial Stress™
- Material Change™

Specifically, D&B and Urban Explorer will provide effective solutions for several South Florida initiatives



1 Business Engagement and Rapid Response

The purpose of Business Engagement and Rapid Response is to promote economic recovery and vitality by developing an ongoing, comprehensive approach to identifying, planning for, or responding to layoffs and dislocations, and preventing or minimizing their impacts on workers, businesses, and communities.

Our Solution Will:

- ✓ Provide actionable intelligence to determine the employers that are in transition (expansion & contraction).
- ✓ Enable anticipatory analytics to design programs and real-time intervention strategies to prevent or minimize layoffs and unemployment events.
- ✓ Increase efficiency of outreaching & brokering relationships with employers for consultative engagement on different aversion & training opportunities.
- ✓ Increase of effectiveness of planning and analysis of the South Florida business landscape with real-time, predictive and anticipatory economic data.

2 Business Recovery & Workshare Programs

Business Recovery includes the strategies and activities that are designed to prevent, or minimize the duration of, unemployment, including “workshare” or “shared work”. ETA encourages state and local business services and rapid response operators to design innovative solutions, including those described below, for both businesses and workers potentially in transition.

Our Solution Will:

- ✓ Provide proactive measures to identify communities, industries and employers most likely to be in economic transition (contraction) based on actual business performance.
- ✓ Predict & Identify companies that may benefit from state’s short time compensation or other programs designed to prevent or minimize layoffs or to quickly re-employ dislocated workers (rapid reemployment) before contraction may occur.
- ✓ Provide employer data required for effective engagement, partnership and relationship building with businesses in the community – effective outreach.
- ✓ Increase knowledge of employers and their risks and vulnerabilities including background of their potential supply chains.

3 Economic Development Programs

Economic Development has many meanings, but in general can be defined as efforts that seek to improve the economic well-being and quality of life for a community by creating and retaining jobs and supporting and growing incomes and the tax base of the community. Activities include helping local businesses grow; retaining them; and attracting new businesses.

Our Solution Will:

- ✓ Provide data and tools for analysis of local community's business strengths and opportunities from an industry and regional perspective (macro), but also at the employer location level (micro).
- ✓ Enable historical business trends, while also providing current business landscape (updated monthly) at the employer level.
- ✓ Predictive, Anticipatory & Geographical (GIS) representations of a business intended to measure their capability for growth and expansion, or likelihood of financial stress or contraction.
- ✓ Increase the effectiveness of local boards – in tandem with their local partners - in providing the right solutions for employers.

4 Local and Industry Cluster Analysis

Under WIOA, states are expected to perform industry cluster analysis to determine industries that are growing or contracting; and measuring regions by their industry strengths and weaknesses.

Our Solution Will:

- ✓ Provide data and tools for analysis of local community's business strengths and opportunities from an industry and regional perspective (macro), but also at the employer location level (micro).
- ✓ Enable historical business trends, while also providing current business landscape (updated monthly) at the employer level.
- ✓ Predictive, Anticipatory & Geographical (GIS) representations of a business intended to measure their capability for growth and expansion, or likelihood of financial stress or contraction.
- ✓ Data for continued interactions with sector partners, while uncovering new employers to participate in industry conversations.

Workforce Program Use Cases

- **Layoff Aversion / Early Intervention** – Identifying employers with elevated risk of closure or failure before a WARN notice is filed, allowing proactive engagement and employer support.
- **Worker Based Training Programs** – Manage business engagement activity by finding companies that are in need of better skilled workers yet unable to make robust investments for training.
- **Who is Hiring?** – Identify healthy and growing employers that can be flagged for engagement to explore hiring opportunities.
- **Grant and Loan Programs** – Identify qualified or eligible employers for program engagement.
- **Rapid Response / Re-employment** – For dislocated workers, finding other businesses that are financially sound and demonstrating growth behaviors, and are more likely to need additional workforce.
- **WorkShare** – For layoff aversion activity, using predictive risk indicators to locate businesses with a higher potential for layoffs, to educate them on WorkShare program opportunities.
- **Apprenticeship** – Utilize D&B Linkage™ to identify businesses that are related to active and prior apprenticeship programs (Nationwide) and introduce the apprenticeship program to increase workforce. Additionally, combine with predictive analytics to find healthy businesses in growth mode.

Data and Content

Consistent & actionable business information, to increase effectiveness of South Florida' WIOA initiatives

Unique Dun & Bradstreet Content

Updated quarterly, the local workforce development area will have access to the most current D&B representation of the South Florida employer market

- **D-U-N-S® Number** – D&B's proprietary 9-digit unique identifier for a business, that is site specific and remains with a business from its creation to its closing. Never to be used by another entity.
- **Comprehensive Business Profile (Appendix A)** – D&B's most robust data layout providing complete details on a business, at a site level.
- **Financial Stress Score™ (FSS)**
 - FSS is an indicator of financial stability of a business measuring the likelihood of a business to experience financial distress in the next 12 to 18 months.
- **Opportunity Final Segment / Material Change™ (MC)**
 - Material Change™ leverages D&B's vast array of business performance and data signals to anticipate a business' change in condition (likelihood to grow, maintain or contract)
- **Corporate Linkage®**
 - Capability to understand the position an employer location fits within the confines of a corporate family, whether HQ is in the U.S. or International

Consistent & actionable business information, to increase effectiveness of South Florida' WIOA initiatives

EconoVue™ Platform

EconoVue’s core business database is provided through partnership with Dun & Bradstreet. As the world’s premier provider of business information, Dun & Bradstreet’s business data gives EconoVue™ users a breadth, depth, completeness, accuracy and currency of information available nowhere else.

Dun & Bradstreet data content included:

Comprehensive current address level D&B listings for the region | Historical sector trend data | Financial Stress Scores | Material Change | Live on-demand email contacts | Live on-demand company reports.

SITE LEVEL DATA	BUSINESS DATA	SPECIALTY DATA
Business Name	NAICS & SIC Codes	Owns / Rents indicator
Tradestyle / DBA	Industry Category	Minority-owned indicator
Address	Company Size	Women-owned indicator
Telephone Number	Employees Here	Business Failure Risk score
Executive Contact Details	Sales Volume	Business Growth / Contraction data
Lat / Long	Year Started	Manufacturing Indicator
Additional Locations	Parent / Headquarters Detail	Location Type Detail

Consistent & actionable business information, to increase effectiveness of South Florida' WIOA initiatives

Urban Explorer’s EconoVue™ Platform: Data Content & Sources

Along with the Dun & Bradstreet data, the EconoVue platform provides additional EconoVue-specific content on each business.

ECONOVUE SPECIALTY DATA		
LWIA designation	QCEW Wage Data	Wage-Based Research
Financial Stress History	Location Quotient	COVID-Related Data
PPP Loan Data	Time-Series Analysis	Corporate Family Tree Map
WARN Notice Data	CareerOneStop Connection	Disaster-Zone Designations
Essential Business Classification	Indeed.com Job Listings	Apprenticeship Data*

CareerOneStop Web-Services

Real-time calls to CareerOneStop (www.careeronestop.org) to retrieve information about occupations, salaries and college training programs, based upon NAICs codes and region.

Indeed.com job listings

EconoVue™ dynamically retrieves job listings for any selected business or region via on-demand calls to Indeed.com. Indeed.com aggregates job listings from thousands of websites, including job boards, newspapers, associations, and company career pages.

Workforce Solution Deliverables

DIRECT ACCESS TO D&B BUSINESS DATA

Unlike many data companies who aggregate and publish data “as is,” D&B directly collects, curates, synthesizes, and verifies data globally from sources developed by our professional staff and trusted partners in a multilingual, multicultural context. Equally important, we are committed to collecting and providing data within the guidelines of an increasingly complicated global data privacy and regulatory landscape.

D&B Live Data Cloud

- 30K Global Sources
- 420+ Million Business Sites / 115 Million Globally Linked
 - 20 Million U.S.
 - 252K in the South Florida workforce development area

The Data

- Proprietary Business Demographics (Location, Industry, Size, Corporate Family, Diversity, e.g.)
- Financial Condition (Financial Stress Score™ & Opportunity Segment / Material Change™)
- Updated Monthly (Changes, New to the World, Closures)

D&B COMPREHENSIVE REPORTS

Live feeds provide current and historical context on operations

UBER TECHNOLOGIES, INC.

Tradestyle(s): UBER

ACTIVE **HEADQUARTERS**

D-U-N-S Number: 01-389-5459

Company: UBER TECHNOLOGIES, INC.

Legal Events

The following Public Filing data is for information purposes only and is not the official record. Certified copies can only be obtained from the official source.

Bankruptcies	Judgements	Liens	Suits	UCCs
No	4 Latest Filing: 11/06/2018	26 Latest Filing: 05/04/2020	451 Latest Filing: 09/28/2020	48 Latest Filing: 08/15/2020

UCC Filing - Original

Filing Date	05/26/2020
Filing Number	207781358425
Received Date	06/09/2020
Collateral	All Negotiable Instruments including proceeds and products - All Inventory including proceeds and products - All Account(s) including proceeds and products - All General Intangibles(s) including proceeds and products - and OTHERS
Secured Party	U.S. SMALL BUSINESS ADMINISTRATION, EL PASO, TX
Debtors	UBER
Filing Office	SECRETARY OF STATE/UCC DIVISION, SACRAMENTO, CA

TRADE LINES

Select Date Range

Example of D&B Trade Data

Date of Experience	Payment Status	Selling Terms	High Credit (US\$)	Now Owes (US\$)	Past Due (US\$)
10/20	Pays Prompt to Slow 60+	-	25,000	20,000	15,000
09/20	Pays Promptly	-	0	100,000	0
09/20	Pays Promptly	-	0	5,000	0
09/20	Pays Promptly	-	0	90,000	0
09/20	Pays Promptly	-	0	1,000	0
09/20	Pays Promptly	-	2,000,000	800,000	0
09/20	Pays Promptly	N30	700,000	0	0
09/20	Pays Promptly	-	500,000	0	0
09/20	Pays Promptly	-	300,000	15,000	5,000
09/20	Pays Promptly	-	300,000	100,000	0
09/20	Pays Promptly	-	300,000	200,000	0
09/20	Pays Promptly	-	200,000	200,000	0
09/20	Pays Promptly	N60	95,000	75,000	0

EconoVue™ Platform

Economic Analytics & Employer Outreach

The EconoVue™ platform is a subscription-based Software-as-a-Service (SaaS) regional economic analytics and employer outreach system that can be accessed via any web browser.

It has been designed to assist in the workflow associated with economic development, planning and layoff aversion (WIOA Priorities) by providing tools to Workforce Boards to:

1. Quickly determine the “priority sectors” within a region
2. Understand historical and current business trends using GIS techniques
3. Find the employers within these sectors exhibiting financial stress / or determine employers that are exhibiting strong financial characteristics
4. Outreach to these employers and document the effort via CRM tools
5. Assist displaced workers in finding employment in similar companies within the region
6. Research markets for economic development

The EconoVue™ platform is a modular SaaS solution split into four main modules.

OverVue™ | ProspectVue™ | RegionVue™ | LocalVue™

EconoVue™ Platform

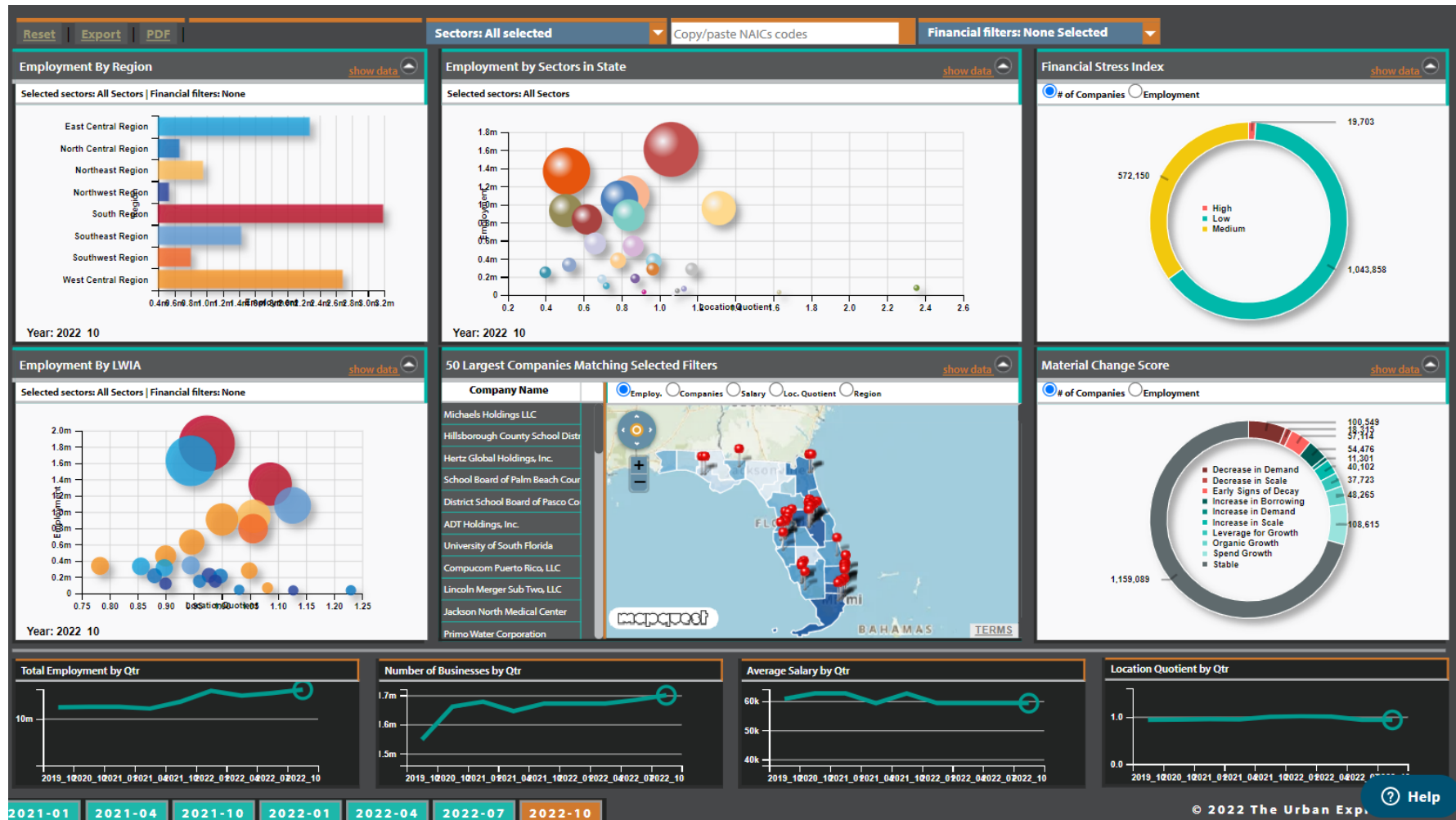
Economic Analytics & Employer Outreach

OverVue™

OverVue, provides multi-dimensional data views of the business and workforce picture in a single dashboard. Visualized in multiple panes showing geography, industry, business health, risk, growth and contraction, OverVue's data windows are dynamically linked, presenting changing and updated analysis as users select data points to identify current and trending insights on:

- Employer and workforce location distribution
- Employment segmentation and concentration by industry
- Rising and falling industry segments for employment
- High-risk industries and businesses for intervention strategy
- Growth industries for engagement and collaboration opportunities

OverVue™ Uncover wide Industry Trends



Wide lens view of the South Florida market with drill-downs into more specific categories of research

OverVue, offers users an intuitive dashboard interface, focused on the most used dimensions of research: Geography | Industry Segment | Employment Segmentation | Employer Risk | Business Growth | Largest Employers | Local Employment analysis | Time Series data trends

EconoVue™ Platform

Economic Analytics & Employer Outreach

ProspectVue™

ProspectVue is a map-based employer outreach tool that combines a search interface with a lightweight Customer Relationship Management (CRM).

- The search interface allows user to interact with the underlining database (GIS and D&B) to retrieve business data. Such as, company search or grouping of businesses by multi-variate selections, including at-risk firms using Financial Stress Score and Material Change for layoff aversion & economic development activities.
- The Business Disruption Search utilizes D&B predictive data and COVID-19 industry classification to identify:
 - Changes in businesses (per city, county, region, or state)
 - SBA PPP Loan recipients
 - Active Disaster Zones, including businesses and predictive elements to identify business health
 - WARN Notice Search – Identifying prior and current WARN notices and using Corporate Linkage™ to strengthen Layoff Aversion strategies.

ProspectVue™ Empower Local Employer Outreach

Filtered, multi criteria map-based search for companies

The screenshot displays the ProspectVue web application interface. At the top, there are navigation tabs for 'Intro', 'regionvue', 'localvue', 'prospectvue', and 'overview'. The 'prospectvue' tab is active. The user is logged in as 'Natasha Young'. The search bar contains 'CareerSource South Flo'. The map shows a large cluster of red pins in the Miami area, with labels for Coral Springs, Inwood, Sunrise, Fort Lauderdale, Weston, Hollywood, and Key Largo. The left sidebar contains search filters for 'Manufacturing' and 'Computer, Electrical Equipment, Components'. Below the filters, there is a list of search results:

- 1 Svite (aka R & P Sistemas Inc)**
33178, Doral
Computer Storage Device Manufa...
Employees: 4
- 123 Dollar Plus Inc**
33144, Miami
Current-Carrying Wiring Device...
Employees: 7
- 3nstar, Inc.**
33172, Doral
Electronic Computer Manufactur...
Employees: 10
- 4s Software And Services, Llc**
33166, Miami
Manufacturing and Reproducing ...
Employees: 5

Explore all regions spatially via a dynamically linked and integrated mapping app. For any census geography, retrieve dynamic industry trend reports via mapped historical D&B data, 3D D&B business listings (height denotes size of company) and current dynamically retrieved Indeed.com job listings.

EconoVue™ Platform

Economic Analytics & Employer Outreach

RegionVue™

RegionVue, overlays a current and historical D&B business GIS database of the region which integrates a regional economy visual analytics GUI to provide dynamic reports:

- One-button time series reports all industry sectors (2-6 Digit NAICS)
- All Workforce Investment areas, counties & cities (historical data back 5 years)
- Priority Sector Analysis by number of companies, jobs & wages
- Time-series based “Location Quotient”
- Visuals include column & bubble charts, and employment loss/gain graphs
- Review live postings of job listings and search for training providers
- Identify industry sectors and build business lists for engagement

RegionVue™ Visualize Regional Sector Trends

Drilldown Sub Sectors: Bubble, Column, Timeline, Net Gain/Loss

D&B Current Company Listings

Click on records in list below to get more info. Sort list by clicking on any list column header. Select filters in left column to choose records by type/size of business.

Company	Sector Type	Employment	Sales	DunsNumber
Bulverde Spring Branch Emergency Services	NAICS: 6219 Other ambulatory health care services	56	9945545	001211833
John Seals Md	NAICS: 6211 Offices of physicians	5	450000	001663330
Bulverde Eye Care	NAICS: 6213 Offices of other health practitioners	3	234981	001767156
Barbara P Belcher Md	NAICS: 6211 Offices of physicians	5	165340	001769442
Stratmann & Stratmann D.D.S., Inc.	NAICS: 6212 Offices of dentists	7	554341	001835438
Stafford Family Dental	NAICS: 6212 Offices of dentists	3	274652	001968630
Premier Er	NAICS: 6214 Outpatient care centers	15	863484	002017123
Camden Medical Center	NAICS: 6211 Offices of physicians	10	111981	002029959
Almost Rehab Centers, L.L.C.	NAICS: 6214 Outpatient care centers	2	12430342	002037727
Metro Treatment Of Texas Lp Dba San Anto	NAICS: 6214 Outpatient care centers	10	288744	002044939
Otr Management, Inc.	NAICS: 6219 Other ambulatory health care services	1	0	002070166
Detailed Dental, Pllc	NAICS: 6212 Offices of dentists	9	183699	002085427
The University Of Texas Health Science Center At San Antonio	NAICS: 6211 Offices of physicians	184	0	002092661
Paula N. Emerson, Od	NAICS: 6213 Offices of other health practitioners	2	106070	002093963
Geriatric Dental Group Of South Texas	NAICS: 6212 Offices of dentists	14	1183018	002126291

Current Occupation and Job Listings

regionVue Workforce Development Areas Alamo WDA All Cities in Region Go

MAIN SECTORS

SUB SECTORS: Health Care

NAICS 4 DIGIT: Ambulatory Health...

OCCUPATIONS:

Sort by: Job Title Over Job Zone

Ambulance Drivers and Attendants, Ex Onst: 53-3011 | Onst Job Zone 3

Anesthesiologists Onst: 29-1211 | Onst Job Zone 5

Athletic Trainers Onst: 29-9091 | Onst Job Zone 5

Audiologists Onst: 29-1181 | Onst Job Zone 5

Biological Technicians Onst: 19-4021 | Onst Job Zone 4

Cardiovascular Technologists and Tech Onst: 29-3011 | Onst Job Zone 3

Occupations: Get Training and Find Job Openings

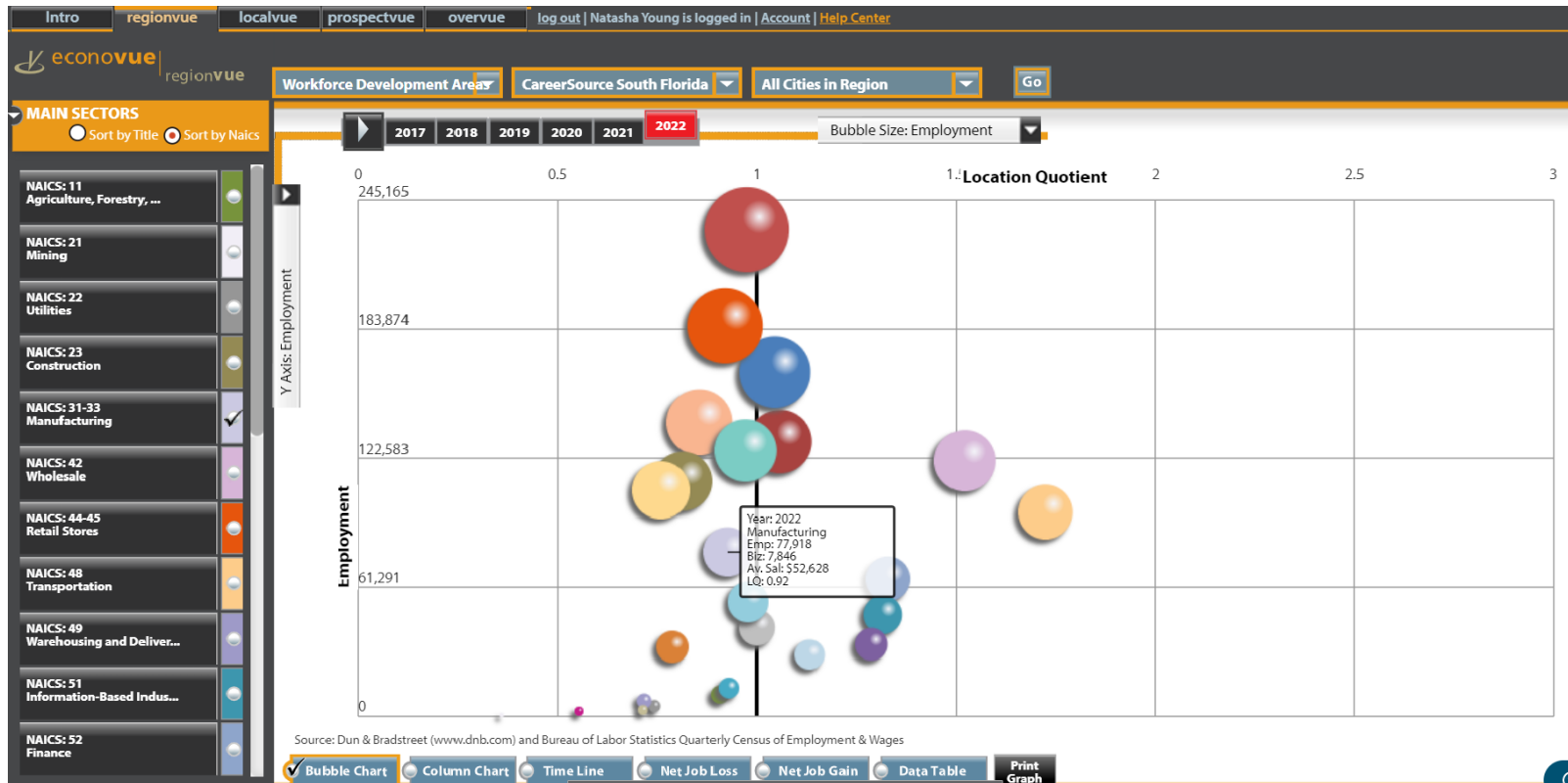
Audiologists, Onst Code: 29-1181, Onst Job Zone: 5 [Find out more about Onst Job Zones](#)

Assess and treat persons with hearing and related disorders. May fit hearing aids and provide auditory training. May perform research related to hearing problems. National Salary Range: \$71,390 - \$99,340. Annual Median Salary: National Median: \$78,850, Texas State Median: \$88,460, San Antonio-New Braunfels, TX Metro Area Median: \$90,480

Jobs by Indeed Find Jobs Find Training

Salary Estimate: (eg. \$50,000 or \$40K-\$50K) within 50 miles

Job Title	Company	Address	When
Health Technician (Hearing Instrument Specialist)	US Veterans Health Administration	San Antonio, TX 78229	8 days ago
Audiologist - Ped ENT Audiology	Christus Health	San Antonio, TX 78207	4 days ago
Audiologist Lead - Ped ENT Audiology	Christus Health	San Antonio, TX 78207	14 days ago
Audiologist - Pediatric ENT	CHRISTUS Health	San Antonio, TX 78207	6 days ago



Visualize time series datasets via animated/interactive Bubble Charts, Column Charts, Timelines and Employment Loss/Gain graphs. Interactive charts which combine statistics (like Location Quotient) with animation instantly reveal emerging sectors with a regional specialization.

EconoVue™ Platform

Economic Analytics & Employer Outreach

LocalVue™

The LocalVue module is a visual business mapping analytics tool which spatially displays business and economic trends and reports:

- Industry sector and geography (zip code, city and census tract)
- Dynamically generates reports for any selected region or radius around a point
- Time-series sector trends, business lists and Indeed.com job listings.
- Reports available and easily exported as Excel
- Maps can be exported as PDFs.

Investment

Training and Support

Workforce Solutions are supported by Dun & Bradstreet and Urban Explorer. In a live engagement, you will receive:

- ✓ Solution Onboarding and Training – led by D&B and Urban Explorer teams
 - ✓ User Monthly Training Calls – led by D&B and Urban Explorer
 - ✓ D&B Monthly Leadership Calls – focused on aligning strategy with operations
- ✓ D&B Account Team:
 - Business Development Exec – Chip Rogers
 - Client Director – Natasha Young
 - Workforce SME – Michele Robertson
 - ✓ Urban Explorer Account Team:
 - CEO – Cheryl Parker
 - EconoVue Training – Ulisse Gallo

Investment: EconoVue / D&B Reports w/ 30 user licenses

Urban Explorer EconoVue™ Platform <ul style="list-style-type: none">▪ OverVue, ProspectVue, RegionVue & LocalVue Subscriptions▪ Financial Stress & NAICS Custom Tables▪ Material Change (Growth or Contraction) available on South Florida Regional records▪ Strategic Database Marketing Record Layout▪ D&B Data Updated Quarterly▪ South Florida D&B Historical Data▪ API for Real Time D&B data▪ Indeed.com job listings▪ Training	# of Business Records: 256,502
	# of Users: 30
	12-month Investment: \$149,009.35

Our Unique Solution

Dun & Bradstreet: Establishing Relationships with Business

For nearly two centuries Dun & Bradstreet has partnered with some of the most successful companies and governments in the world. Our information and intelligence empowers our clients to make relationship-based decisions with their transaction partners (prospects, customers, vendors, partners, tax constituents, etc..) to make economic and profitable connections.

Our expertise for close 200 years has been our ability to create a single, integrated view of a business tied together by the D-U-N-S® Number, our unique global business identifier that validates and links businesses worldwide and transforming the world's largest commercial database of more than 420 million employer locations.

The database is derived from over 30,000 unique data sources and is updated 5 million times per day, powered by our patented DUNSRight process that turns enormous volumes of “big data” to provide our clients with high-quality information build valuable connections and relationships with business.

For the CareerSource South Florida, establishing these same types of connections and relationships is paramount to the success of all employee & employer programs; for WIOA, economic development and the management of Unemployment Insurance finances.

Our Unique Solution

Our data and analytics solution has a foundation of Dun & Bradstreet's core business intelligence that is unique in the business intelligence space. Of course, there are other business data sources available, including state employer data, but none are able to match:

D&B's proprietary business value

- ✓ D-U-N-S® Number
- ✓ Financial Stress Score™
- ✓ Global Data & Advanced Analytics
- ✓ Corporate Linkage ®
- ✓ DUNSRight
- ✓ Material Change™

Urban Explorer provides a patented EconoVue™ platform system driven by the individual modules of LocalVue™, RegionVue™ and ProspectVue™. Additionally, EconoVue provides access to not only Dun & Bradstreet insight, but brings together several other employer and employee related data sources to enable a historical and present view of the economics of the state, a county, a city or a business.

There is no other solution that combines the power of Dun & Bradstreet data and analytics and Urban Explorer's patented business engagement tool.