



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**Budget Workshop**

**Thursday, June 16, 2016**

**9:30 A.M.**

SFWIB Headquarters  
7300 Corporate Center Drive  
Conference Room 3  
Miami, Florida 33126

**AGENDA**

1. Call to Order and Introductions
2. Information – ITA Waiver Recommendation
3. Information – Approved In-State Allocations
4. Information – PY2016-17 Budget Worksheet



**SFWIB FINANCE EFFICIENCY COUNCIL**

**DATE:** 6/16/2016

**AGENDA ITEM NUMBER:** 2

**AGENDA ITEM SUBJECT:** SLIDING SCALE ITA WAIVER RECOMMENDATION

**AGENDA ITEM TYPE:** **INFORMATIONAL**

**RECOMMENDATION:** N/A

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

**STRATEGIC PROJECT:** **Strengthen workforce system accountability**

**BACKGROUND:**

Florida Statutes states that at least 50% of the Title I funds for Adults and Dislocated Workers that are passed through to regional workforce boards must be allocated to and expended on Individual Training Accounts. The law also allows a regional workforce board to request and obtain a waiver relating to the 50% requirement from CareerSource Florida. On May 25, 2016, CareerSource Florida approved the continuation of the same policy as was approved in the previous fiscal year. The ITA waiver policy would allow for regions to select a waiver percentage based on two options:

1. Additional one-year extensions of their approved ITA percentage, or
2. A sliding scale ITA percentage based on their reduced funding levels (WIOA, WP, and TANF) as compared to fiscal year 2012/13 (the year in which Florida implemented the new statutory requirement of 50% ITA expenditures).

Regional workforce boards may request a percentage between the statutorily required amount of 50% and the lowest option available. For example, a region may be eligible for a waiver that would reduce its required ITA percentage to 35%. However, the region may want its waiver percentage to be at some higher level, such as 42%. Under this scenario, the region would request a 42% waiver.

**FUNDING:** N/A

**PERFORMANCE:** N/A

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requirement.) However, if the local workforce development board desires a waiver greater than shown on the “Sliding Scale” chart, the local workforce development board must either request a “One-Year Extension” (if eligible) or submit a full request for a new waiver with supporting documentation pursuant to CSF Administrative Policy DEO FG-074 .

A local workforce development board which had been granted a waiver the previous fiscal year can request a one-year extension of the 2015-2016 waiver for the 2016-2017 fiscal year by formally requesting the waiver extension with the following documentation:

- 1) A request for a one-year extension of the waiver as granted under the previous waiver request.
- 2) Documentation supporting the extension of the previously approved waiver by showing the current and/or anticipated changes in the local workforce development board’s circumstances (as compared to the 2012-13 fiscal year).
- 3) Documentation showing that the local workforce development board and “chief elected official” (which may be a representative of a consortium for multi-county regions) have approved (as evidenced by their signatures) the waiver request.
- 4) Documentation showing how the waiver (or lack of waiver) would impact the local workforce development board’s ability to accomplish the Governor’s goals of increased placements and service to business, through quantifying in numbers (rather than comparatives) how the granting of the waiver would affect those goals.

For the purposes of these waivers, it has been clarified that the “budget” means the complete fiscal budget and not just the WIOA budget.

Such requests should be submitted by August 31, 2016 to DEO, care of Pam Caudill at [pamela.caudill@deo.myflorida.com](mailto:pamela.caudill@deo.myflorida.com).



**SFWIB FINANCE EFFICIENCY COUNCIL**

**DATE:** 6/16/2016

**AGENDA ITEM NUMBER:** 3

**AGENDA ITEM SUBJECT:** APPROVED IN-STATE ALLOCATIONS

**AGENDA ITEM TYPE:** **INFORMATIONAL**

**RECOMMENDATION:** N/A

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

**STRATEGIC PROJECT:** **Strengthen workforce system accountability**

**BACKGROUND:**

On May 25, 2016, CareerSource Florida, Inc. approved the funding In-State allocations for PY16-17 for the Workforce Innovation and Opportunity Act (WIOA) Adult, Dislocated Worker, and Youth Activities Programs, Wagner-Peyser Act Employment Service Program (WP) and Temporary Assistance for Needy Families (TANF).

Federal laws specify formulas for distributing WIOA among states and for sub-state allocations, primarily based upon relative shares of workforce, unemployment and poverty factors. WIOA (Public Law 113-128) provided that for Adult and Youth funding streams, 85% of the total federal award must be distributed to regional workforce boards by formula, and allowed the Governor to reserve up to 15% at the state level for operational expenses, performance-based incentive payments to regions, program management and oversight, and state board-authorized initiatives. Similarly, WIOA Dislocated Worker funds also contributed 15% to the state-level "pool," with another 25% of the total federal award allocated for purposes of funding a state-level program for rapid response assistance to dislocated workers, including emergency supplements to regional workforce boards. The remaining 60% of the federal dislocated funds were then distributed to the regions based on a formula emphasizing relative unemployment factors.

For the last four fiscal years, congressional actions have decreased the statutory 15% portion of the formula grant funds that governors may reserve for statewide activities from a low of 5% to last year's portion of 8.75%. This year, the reserve for statewide activities is 10%, which still represents a 33% reduction from the statutory 15% reserve. The latest change in the state set-aside is not permanent and efforts continue at the national level to fully restore the 15% discretionary funding.

**FUNDING:** N/A

**PERFORMANCE:** N/A

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## **SFWIB FINANCE EFFICIENCY COUNCIL**

**DATE:** 6/16/2016

**AGENDA ITEM NUMBER:** 4

**AGENDA ITEM SUBJECT:** FISCAL YEAR 2016-17 BUDGET

**AGENDA ITEM TYPE:** **INFORMATIONAL**

**RECOMMENDATION:** N / A

**STRATEGIC GOAL:** **HIGH ROI THROUGH CONTINUOUS IMPROVEMENT**

**STRATEGIC PROJECT:** **Strengthen workforce system accountability**

### **BACKGROUND:**

The attached "SFWIB Budget - 2016-17" chart is a summary of the annual budgeted revenues and expenditures for the South Florida Workforce Investment Board (SFWIB). The chart is comprised of three major sections:

1. **2016-17 State Funding:** This first group of columns reflect the new funding awards that SFWIB is anticipating it will receive during the upcoming budget year. The total award dollars are divided into two amounts: The funds that will be utilized during budget year 2016-17 and the amounts that will be reserved for budget year 2017-18.
2. **2016-17 Program Budget:** The second section are the funding amounts that comprise the 2016-17 revenue Budget. The amounts shown under the column "Prior Budget Year Reserves" are the amounts that were reserved last budget year and which are available for use this current budget year. The amounts under Prior Budget Year Carryover are the remaining funds available from the previous year awards. These unexpended amounts roll over to the current budget year. The amounts under the column "New Budget Year Funding" are the new funds that will be utilized in this budget year.
3. **2016-17 Cost Distributions:** This section of the budget shows all the proposed expenditures for the 2016-17 budget years. Expenditures are sub-divided into four major cost categories:
  - **HQ (Programs and Administrative):** These are the anticipated expenditures for operating the SFWIB Headquarter office. Included under this category are all the staffing and occupancy costs associated with operating the SFWIB main office.
  - **Training:** These are the anticipated costs associated with the skills training services offered by SFWIB. Note that only certain grants allow for training expenditures, but all grants require that employment services be offered to participants.

- Career Center Facility Costs: These are the occupancy costs associated with operating the Career Centers. SFWIB leases all these facilities from third parties, and directly pays for insurance, utilities and other facility expenditures. SFWIB does not own any of the locations.
- Provider Contract: These are the amounts that will be awarded to the subcontractors that perform employment services on behalf of SFWIB. Currently, SFWIB contracts with approximately 15 community based organizations across Miami Dade and Monroe counties.

**FUNDING:** All Funding Streams

**PERFORMANCE:** N/A

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