



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
GLOBAL TALENT AND COMPETITIVENESS (GTC)  
COUNCIL MEETING  
THURSDAY, DECEMBER 21, 2023  
8:30 AM**

ARPEC School/UA Local 725 Pipefitters  
Conference Room #3  
13201 NW 45th Avenue  
Opa Locka, FL 33054

The public may choose to view the session online via Zoom. **Registration is required:**  
<https://us02web.zoom.us/meeting/register/tZApcuCuqDoiHdfQcKvvSUWUz1vGZliStRim>

**AGENDA**

1. Call to Order and Introductions
2. Approval of GTC Council Meeting Minutes
  - A. October 19, 2023
  - B. August 17, 2023
3. Recommendation as to Approval to Allocate Florida College Plan Scholarships
4. Recommendation as to Approval to Allocate Funds for the 2024 Future Bankers Training Camp Program
5. Recommendation as to Approval to Allocate Additional Funds for the In-School Youth Program Paid Work Experience
6. Recommendation as to Approval to Add Occupations to the WDA 23 Targeted Occupations List
7. Recommendation as to Approval of a New Training Provider and Programs and New Programs for an Existing Training Provider
8. Recommendation as to Approval of Revisions to the On-the-Job Training Policy
9. Recommendation as to Approval of a Support Services Policy

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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 GLOBAL TALENT & COMPETITIVENESS COUNCIL MEETING

**DATE:** 12/21/2023

**AGENDA ITEM:** 2A

**AGENDA TOPIC:** MEETING MINUTES

### SFWIB GLOBAL TALENT & COMPETITIVENESS COUNCIL MEETING MINUTES

**DATE/TIME:** October 19, 2023, 8:30AM

**LOCATION:** The DoubleTree by Hilton Miami Airport Convention Center (Hotel Side)  
The Hibiscus Room  
711 NW 72nd Avenue  
Miami, FL 33126

**Zoom:** <https://us02web.zoom.us/join/9152164370?pwd=ZApucUcuQDoiHdfQcKvvSUWUz1vGZiStRim>

1. **CALL TO ORDER:** Chairwoman Ferradaz called to order the regular meeting of the SFWIB Global Talent and Competitiveness Council on October 19, 2023 at 8:45am.
2. **ROLL CALL:** 10 members; 6 required; 5 present: No Quorum

SFWIB GTCC MEMBERS PRESENT	SFWIB GTCC MEMBERS ABSENT	SFWIB STAFF
Brecheisen, Bruce Brown, Clarence Del Valle, Juan-Carlos (Zoom) Ferradaz, Gilda, Chair Whitaker, David	Gazitua, Luis Lincoln, Michelle, Commissioner  <b>SFWIB GTCC MEMBERS EXCUSED</b> Grice, Sonia Loynaz, Oscar M.D., Vice-Chair Piedra, Obdulio	Kelly, Travis Smith, Robert
<b>OTHER ATTENDEES</b>		
Diaz, Lupe, Miami-Dade County Public Schools Quinn, Robert, Miami-Dade County Public Schools Ryland, Violet, Department of Children and Families		



Chairwoman Ferradaz explained that the Council anticipates the presence of additional members; however, a quorum has not yet been reached at the start of the session. The approval of the minutes from the August 17, 2023, GTCC meeting will be waived, and the group will revisit the matter if a quorum is subsequently attained.

Agenda items are displayed in the order they were discussed.

### **3. Information – Summer Youth Internship Program Update**

Chairwoman Ferradaz introduced the item and welcomed Dr. Lupe Diaz of Miami-Dade County Public Schools for a presentation to the Council.

The M-DCPS Summer Youth Internship 2023 Accomplishments presentation is available for review via the October 19, 2023 GTCC agenda packet.

Mr. Brecheisen asked for clarification on the stipends for students participating in the program. Mr. Smith and Dr. Diaz provided guidance on the payment dates and expected amount of each disbursement. There was continued discussion around the budget and payments.

No further questions or comments were presented. Item closed.

As a quorum has not been attained, Chairwoman Ferradaz announced that the council would hear the items for approval and move them by consensus of those present.

### **4. Approval – 2024 Summer Youth Internship Program Funding Allocation**

Chairwoman Ferradaz introduced the item; Mr. Smith further presented the funding recommendation for the Miami-Dade County Public Schools 2024 Summer Youth Internship Program.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.



## 5. Approval – Add Occupations to the WDA 23 Targeted Occupations List

Chairwoman Ferradaz introduced and reviewed the item.

Miami-Dade County Public Schools and Miami Dade College requested two additional Standard Occupational Classification (SOC) codes be added to the 2023-2024 Targeted Occupations List (TOL) for WDA 23.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.

## 6. Approval – His House Children’s Home Funding Allocation

The item was introduced by Chairwoman Ferradaz, and Mr. Kelly provided additional information pertaining to the program.

Mr. Brecheisen inquired about the anticipated number of adolescents served and the capacity of the facility. Mr. Kelly explained that His House accommodates transient individuals who are permitted to reside there temporarily or for a specific length of time.

In continuation, Mr. Brecheisen inquired as to how the effectiveness of the program would be assessed. Mr. Kelly described the criteria that CSSF uses to assess the effectiveness of a program.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.

Being as there were no further questions or concerns, the meeting adjourned at 9:15am.



**SFWIB GLOBAL TALENT & COMPETITIVENESS COUNCIL**

**MEETING DATE:** 12/21/2023

**AGENDA ITEM:** 2B

**AGENDA TOPIC:** MEETING MINUTES

**SFWIB GLOBAL TALENT & COMPETITIVENESS COUNCIL MEETING MINUTES**

**DATE/TIME:** August 17, 2023, 8:30AM

**LOCATION:** The Landing at MIA  
 5 Star Conference Center (Florida Key Room)  
 7415 Corporate Center Drive, Suite H  
 Miami, FL 33126

**Zoom:** <https://us02web.zoom.us/meeting/register/tZ0lceysqj4oGtWBmMGILVbF68iV33SCib29>

1. **CALL TO ORDER:** Chairwoman Ferradaz called to order the regular meeting of the SFWIB Global Talent and Competiveness Council on August 17, 2023 at 8:44am.
2. **ROLL CALL:** 9 members; 5 required; 4 present: No Quorum

<b>SFWIB GTCC MEMBERS PRESENT</b>	<b>SFWIB GTCC MEMBERS ABSENT</b>	<b>SFWIB STAFF</b>
Brecheisen, Bruce Ferradaz, Gilda, Chair Grice, Sonia Piedra, Obdulio (Zoom)	Brown, Clarence (Zoom) Gazitua, Luis Lincoln, Michelle, Commissioner  <b>SFWIB GTCC MEMBERS EXCUSED</b> Del Valle, Juan-Carlos Loynaz, Oscar M.D., Vice-Chair	Almonte, Ivan Beasley, Rick Kelly, Travis Smith, Robert
<b>OTHER ATTENDEES</b>		
Rolle, Alexia, Miami Dade College Ortiz-Velazquez, Gizelle, United Way Miami		



Chairwoman Ferradaz explained that the Council anticipates the presence of additional members; however, a quorum has not yet been reached at the start of the session. The approval of the minutes from the August 20, 2023, GTCC meeting will be waived, and the group will revisit the matter if a quorum is subsequently attained.

Agenda items are displayed in the order they were discussed.

### **3. Information – Early Learning Coalition Early Childhood Apprenticeship Program Update**

Chairwoman Ferradaz introduced the item; Mr. Smith further presented.

Mr. Smith delivered a concise update regarding the program's progression, which the Board approved on June 30, 2022. Moreover, he elaborated that while the initial count for the program was anticipated to be fifteen (15) apprentices and four (4) employers, only three (3) employers and six (6) apprentices were in place at this time. Additionally, he disclosed that the wages for the participants has been increased from \$15.28 to \$15.81; nevertheless, the program will adhere to the fiscal limits previously approved by the Board.

Mr. Piedra inquired about the most significant obstacle that staff faced throughout the recruitment process.

Mr. Smith explained that wages were a matter of initial concern during the program's launch; nevertheless, employers were persuaded to raise wages to a minimum of \$15.00 per hour following a prolonged discussion. Mr. Smith introduced Dr. Rolle, from Miami Dade College, who was present to provide further clarification on the obstacles she believed could be affecting the program's participant count. She shared Mr. Smith's viewpoint on the wage dispute and elaborated on the historical factors that contributed to fueling the call for wage hikes. Moreover, Dr. Rolle disclosed that three of the seven employer partners who have signed the MOU have already hired apprentices; nevertheless, each of them reconsidered their initial decision to hire three to four apprentices in light of the wage increases. Conversely, all of them made the decision to move forward with one.

The Department of Education is currently facing a shortage that extends throughout the state of Florida and across the nation. Various initiatives have been implemented that aim to address the situation; nevertheless, the prevailing sentiment is that there is declining interest in pursuing a career in education. Although a complete turnaround will require some time, numerous initiatives are underway to generate greater enthusiasm for a return to the teaching profession.



Mr. Brecheisen asked if the funds eventually expire or sunset. According to Mr. Beasley, the apprenticeship program is unique. Recruiting for the initiative will continue until the objective set by the Board is achieved.

No further questions or comments were presented. Item closed.

#### **4. Information –Miami Dade College Helpdesk Technician Apprenticeship Program Update**

Mr. Smith further an update on the Miami Dade College Helpdesk Technical Apprenticeship Program.

The approval of the Helpdesk Technician Apprenticeship Program (HTAP) for Miami Dade College was granted by the Board at its meeting on August 18, 2022. Eleven apprentices were to be employed by two organizations, Miami Dade College and The Thrive Company. Following the program's approval, The Thrive Company decided to withdraw from the HTAP initiative. Although eleven (11) apprentices were the intended number of participants in this program, only nine (9) are presently active.

Due to their withdrawal from the program, Chairwoman Ferradaz asked whether Miami Dade County could accept the four apprentices who were originally assigned to work for The Thrive Company. MDC could, according to Mr. Smith, since the funds had already been approved. In further elaborating on Thrive's withdrawal, Dr. Rolle stated that the requirements set forth by WIOA and the Department of Labor for apprenticeship programs are rather outdated. This is because apprenticeship programs were originally intended for unions rather than higher education institutions or small businesses such as Thrive. Some businesses decided to forego extra steps to get reimbursement via the program. She elaborated that Thrive continues to be an employer partner; nevertheless, they have opted to abstain from receiving WIOA support.

Mr. Brecheisen commented that on average potentially 5-15K per apprentice. Employers must take into account the number of hurdles they must overcome and the potential areas where a mistake could lead to the complete non-reimbursement of expenses. Mr. Beasley discussed several advantages of an apprenticeship program, such as the financial support that employers are eligible to receive and the initiatives being undertaken by CSSF to reduce the volume of documentation needed for reimbursement. He also shared some of the work being done around the sixty-seven Opportunity Zones in Miami-Dade and Monroe County, which will help reduce the paperwork required by employers in the area.



Additional discourse occurred regarding the historical context of opportunity zones in the state of Florida.

No further questions or comments were presented. Item closed.

As a quorum has not been attained, Chairwoman Ferradaz announced that the council would hear the items for approval and move them by consensus of those present.

## **5. Approval – Revisions to the Support Services and Incentives Matrix**

### **Limits**

Chairwoman Ferradaz introduced the item; Mr. Smith further presented the Support Services and Participant Incentives limits increase request.

Mr. Brecheisen inquired as to when the last increase to support services occurred. It was last updated in 2011, according to Mr. Smith. Following this, Mr. Brecheisen inquired about the methodology used for calculating the value of each of the increases. Mr. Smith explained that a full assessment was carried out for every service rendered, whereby the rate of usage was also taken into account. He further advised that no modifications were recommended in the absence of a price increase since the 2011 update.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.

## **6. Approval – Self-Sufficiency Policy**

Chairwoman Ferradaz introduced the item; Mr. Smith further presented the new WIOA Self-Sufficiency Policy.

A continuous dialogue ensued with the goal of clarifying the purpose of the policy and providing concrete illustrations of its potential future applications. Regarding eligibility, Mr. Beasley clarified that the WIOA Self Sufficiency Policy will take precedence over any other eligibility guidance we may have.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.





## 7. Approval – Self-Attestation Policy

Chairwoman Ferradaz introduced the item; Mr. Smith further presented the new WIOA Self-Attestation Policy.

Further, Mr. Smith elaborated that self-attestation could be utilized as a means of advancing the case in any circumstance where it becomes challenging a constituent to provide documentation. This carries significance in situations whereby former educational institutions have ceased operations or other vital documentation may be no longer accessible. Mr. Beasley continued by stating that documentation and evidence can be obtained in the majority of situations; nevertheless, the objective is to optimize the process and ensure prompt and effective assistance is extended to our constituents.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.

## 8. Approval – Allocate Funds for Amerant Bank Personal Banking Representative Apprenticeship

Chairwoman Ferradaz introduced the item; Mr. Smith further presented and introduced Dr. Rolle, of Miami Dade College to further elaborate on the apprenticeship.

**Item moved by consensus of members present.**

No further questions or comments were presented. Item closed.

## 9. Approval – Apprenticeship Navigators

Chairwoman Ferradaz introduced the item; Mr. Smith further presented.

Mr. Brecheisen inquired as to how progress on the program would be monitored. Dr. Rolle advised that progress would be monitored by performance. Miami Dade College intends to carry out the following: quarterly employer site visits, monthly apprentice check-ins, and classroom attendance/on-the-job hours monitoring.

Additionally, Mr. Beasley disclosed that CSSF staff will provide the Council with regular updates concerning performance. Further, he requested that Board members support the expansion of apprenticeship programs by encouraging the potential employer partnership of businesses with which they are affiliated.

**Item moved by consensus of members present.**



No further questions or comments were presented. Item closed.

Being as there were no further questions or concerns, the meeting adjourned at 9:51am.

DRAFT



## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 3

**AGENDA ITEM SUBJECT:** FLORIDA COLLEGE PLAN SCHOLARSHIPS UPDATE

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval to allocate Florida College Plan Scholarships, as set forth below.

**STRATEGIC GOAL:** **DEDICATED COMMITMENT TO YOUTH PARTICIPATION**

**STRATEGIC PROJECT:** **Joint contribution for youth career pathway models**

### **BACKGROUND:**

The Stanley G. Tate Florida Prepaid College Foundation, Inc., authorized by the Florida legislature in 1989, is a partnership between state government and the private sector. The Foundation, a 501(c)(3) non-profit direct support organization for the Florida Prepaid College Board, administers the Stanley Tate Project STARS Scholarship Program.

The program is designed to provide prepaid postsecondary tuition scholarships to low-income students who are at risk of dropping out of school and may not otherwise be able to afford a college education. Once selected, the students must abide by their school's code of conduct, meet with a mentor on a regular basis, remain drug and crime free, and maintain passing grades.

At the June, 2023 SFWIB Board Meeting, the board approved the purchase of 275 Florida Pre-paid scholarships in an amount not to exceed \$1,400,000 in Temporary Assistance to Needy Families funding. Seventy-five of those scholarship were going to be 2+2 Florida Plan: 60 lower division credit hours of tuition and local fees at a Florida Public College + 60 credit hours of tuition, tuition differential fee, and local fees at a Florida Public University. The remaining 200 would have been 2-yr Florida College Plan: 60 lower division credit hours of tuition and local fees at a Florida Public College.

Upon further research prior to making the purchase it was discovered that the 2+2 Florida Plan Scholarship were not transferable and if a student did not use the full scholarship the remaining balance would be forfeited. As a result of which, staff purchased 186 2-yr Florida College Plan scholarships that are 100 percent transferable to another eligible student. This purchase will ensure that 100 percent of the funding spent is utilized and no funds are forfeited.

CSSF staff recommend to the Global Talent and Competitive Council the proposed Florida College Plan allocation.

<b>Organizations</b>	<b>2-Yrs Florida College Plan</b>	
	<b>Number</b>	<b>Amount</b>
Take Stock In Children	51	\$ 380,990
5000 Role Models	26	\$ 193,296
Mexican American Council	25	\$ 189,094
Mourning Family Foundation	17	\$ 126,063
Kiwanis Club of Little Havana	17	\$ 126,063
Amigos For Kids	17	\$ 126,063
Voices for Children Foundation	17	\$ 126,063
Greater Miami Convention and Visitor Bureau	9	\$ 66,533
Orange Blossom Classic	9	\$ 66,533
<b>TOTALS</b>	<b>186</b>	<b>\$ 1,400,699</b>

**FUNDING:** Temporary Assistance for Needy Families

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 4

**AGENDA ITEM SUBJECT:** FUTURE BANKERS TRAINING CAMP PROGRAM

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval to allocate an amount not to exceed \$125,000 in Workforce Innovation and Opportunity Act Youth funds for the Miami Dade College Future Bankers Training Camp Program, as set forth below.

**STRATEGIC GOAL:** **DEDICATED COMMITMENT TO YOUTH PARTICIPATION**

**STRATEGIC PROJECT:** **Joint contribution for youth career pathway models**

### **BACKGROUND:**

The Future Bankers Training Camp (Future Bankers Camp) Program is designed to motivate and tap into the talent of minority students in low income areas and provide them with a promising career path in the financial services industry. Upon completing the program, students are eligible to receive the American Bankers Association (ABA) and America Institute of Banking (AIB) Bank Tellers Certificates. Students that graduate high school are eligible for a Miami-Dade College (MDC) Vocational Certificate, which allows them to work towards an Associate of Science degree in Financial Services. Students may also participate in industry based internships with partnering financial institutions.

The Future Bankers Camp is partnering with the Adults Mankind Organization, Inc.'s (AMOR) youth program to facilitate the recruitment of up to 50 youth participants into the program. This innovative four week camp provides hands-on experience for students interested in a future financial services career. The camp provides up to 50 students with the opportunity to enhance their math, communication and financial literacy skills by completing an internship with a financial institution and receiving an industry certification. The program will take place from July 1, 2024 through July 26, 2024.

The Future Bankers Camp received matching program dollars from various banking institutions for Program Year (PY) 2022-2023 and provided opportunities to students as follows:

<b>PY 22-23 Future Bankers Training Program Outcomes</b>	
# Of Participants	50
# of who completed 150 hours of classroom training	50
# of who participated in an internship	50
# of participants who received the ABA Banker's Teller's Certification	50
# of financial institutes that provided internships	15
# of high schools who participated in the program	28

The Future Bankers Camp is supported by more than 38 local banks and is aligned with the Miami-Dade County Public Schools district's partnership and involvement in the Opportunity Miami formerly known as the One Community One Goal targeted industries implementation plan.

The track for PY 2023-2024 will include teller and customer service training. The customer service track includes a 3-credit class through MDC. Upon successful completion of the camp, students will be eligible to receive the American Bankers Association Bank Teller and Customer Service Representative Certificates. This national industry standard certificate meets the educational requirement for the certification exam offered by the Institute of Certified Bankers. Miami-Dade County Public Schools students enrolled in the Academy of Finance programs are also welcome to participate in the Future Bankers Camp.

In following the procurement process of Miami-Dade County Administrative Order No. 3-38, it is recommended that the SFWIB waive the competitive procurement, as it is recommended by the Executive Director that this is in the best interest of the SFWIB. A two-thirds vote of the quorum present is required to waive the competitive procurement process and award to Miami-Dade College an allocation not to exceed \$125,000 in Workforce Innovation and Opportunity Act (WIOA) Youth funds for the Future Bankers Training Camp Program.

**FUNDING:** Workforce Innovation and Opportunity Act Youth

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 5

**AGENDA ITEM SUBJECT:** ALLOCATION OF ADDITIONAL IN-SCHOOL YOUTH PROGRAM PAID WORK EXPERIENCE FUNDS

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval to allocate an amount not to exceed \$17,000 in Workforce Innovation and Opportunity Act Youth funds to Adults Mankind Organization, Inc. (AMO) for the In-School Youth Paid Work Experience Program, as set forth below.

**STRATEGIC GOAL:** **DEDICATED COMMITMENT TO YOUTH PARTICIPATION**

**STRATEGIC PROJECT:** **Emphasize work-based learning and training**

### **BACKGROUND:**

Paid Work Experience (PWE) is an essential component of the Workforce Innovation and Opportunity Act (WIOA) In-School Youth Program. It is one of the designated fourteen program elements and provides career exploration into designated career pathways. The South Florida Workforce Investment Board (SFWIB) is required to expend 20 percent of WIOA Youth funding on PWE.

The AMO provides WIOA youth services on behalf of the SFWIB. AMO has exhausted all of the allotted PWE funds for program year 2023-24. As a result, SFWIB staff is requesting an additional \$17,000 in WIOA youth funds to allocate to AMO to provide 14 new participants with 160 hours of PWE at a wage rate of \$13.88 an hour.

**FUNDING:** Workforce Innovation and Opportunity Act Youth

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6

**AGENDA ITEM SUBJECT:** 2023-2024 WDA 23 DEMAND OCCUPATIONS LIST (TOL) ADDITION

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval to add new occupations to the 2023-2024 Target Occupations List, as set forth below.

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

**STRATEGIC PROJECT:** **Improve credential outcomes for job seekers**

### **BACKGROUND:**

The Florida Department of Commerce released the 2023-2024 Demand Occupations List for the 24 Workforce Development Areas (WDA) in the State of Florida. In accordance with CareerSource Florida's Administrative Policy #82, local areas may revise the list, as needed, based on local demand in support the occupation's addition.

SFWIB staff received requests with supporting documentation from two educational institutions to add the following Standard Occupational Classifications (SOC) to the Workforce Development Area 23's Target Occupation List (TOL). The SFWIB must approve any additions to the region's TOL, once approved then SFWIB staff will send the request to Florida Commerce who will add the SOC Codes. The requested occupations:

1. Miami Dade College has requested to add SOC 25-9042 – which covers the following occupations: Teaching Assistants, Preschool, Elementary, Middle, and Secondary School, Except Special Education
2. Miami Dade County Public Schools has requested to add SOC 49-2091 – which covers the Avionics Technician occupation

SFWIB staff completed the review process and requests the Global Talent and Competitiveness Council to recommend to the Board their approval. Once the SFWIB has approved the recommended SOC codes, SFWIB staff will submit to the Florida Department of Commerce to add the codes to our Regional TOL. Once FL DOC has completed the TOL addition process, SFWIB staff will recommend to the GTCC and Board to approve new actual training programs that align with the recommended SOC codes.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*





## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 7

**AGENDA ITEM SUBJECT:** NEW TRAINING PROVIDER AND PROGRAM AND NEW PROGRAMS FOR AN EXISTING TRAINING PROVIDER

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval of a New Training Provider and Programs and New Programs for an Existing Training Provider, as set forth below.

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

**STRATEGIC PROJECT:** **Improve credential outcomes for job seekers**

### **BACKGROUND:**

In accordance with Section 122 of the Workforce Innovation and Opportunity Act, regional workforce boards are permitted to independently develop criteria for the selection and subsequent eligibility of training providers and programs. The South Florida Workforce Investment Board (SFWIB) developed processes to evaluate an applicant's programmatic capabilities.

SFWIB staff completed a review of the submitted documentation and applicable Standard Occupation Codes and is presenting the programs to the Global Talent and Competitiveness Council for a recommendation to the Board for approval. Below are the requests to add new programs for a new training provider and a request to add two new programs for an existing training provider.

Request to be added as a New Apprenticeship Provider and Programs:

1. Washington Technology Industry Association (WTIA) dba Apprenti National Registered Apprenticeship Program (ZA003177731)
  - Application Security Review Engineer (Cyber Defense Incident Responder) – Registered Apprenticeship Certificate
  - Business Intelligence Engineer – Registered Apprenticeship Certificate
  - Cloud Operations Specialist 1 – Registered Apprenticeship Certificate
  - Cloud Operations Specialist 2 – Registered Apprenticeship Certificate

- CRM Administrator (IT Systems Administrator) – Registered Apprenticeship Certificate
- CRM/CMS Developer (Application Developer) – Registered Apprenticeship Certificate
- Cybersecurity Analyst – Registered Apprenticeship Certificate
- Data Analyst – Registered Apprenticeship Certificate
- Developer Operations Specialist (Internetworking Technician) – Registered Apprenticeship Certificate
- Hardware Engineer – Registered Apprenticeship Certificate
- IT Business Analyst (Business Analyst) – Registered Apprenticeship Certificate
- IT Support Professional (Computer Support Specialist) – Registered Apprenticeship Certificate
- Marketing Manager (Marketing Coordinator) – Registered Apprenticeship Certificate
- Network Security Administrator – Registered Apprenticeship Certificate
- Software Analyst (Computer Programmer) – Registered Apprenticeship Certificate
- Software Developer – Registered Apprenticeship Certificate
- Sourcing Recruiter – Registered Apprenticeship Certificate
- Systems Administrator – Registered Apprenticeship Certificate
- Technical Sales Specialist – Registered Apprenticeship Certificate
- User Experience (UX) Designer – Registered Apprenticeship Certificate
- Web Developer (Application Developer) – Registered Apprenticeship Certificate

New Request from an Existing Apprenticeship Provider to add New Programs:

1. District Board of Trustees of Miami Dade College dba Miami Dade College. Apprenticeship Program, GNJ (2018-FL-71114) and Pre-Apprenticeship Program (P-133)
  - Restaurant Manager - Registered Apprenticeship Certificate
  - Teacher Assistant – Pre-Apprenticeship Certificate

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 8

**AGENDA ITEM SUBJECT:** ON-THE-JOB TRAINING POLICY REVISIONS

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval of a revised On-The-Job Training (OJT) Policy, as set forth below

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

**STRATEGIC PROJECT:** **Improve service delivery outcomes**

### **BACKGROUND:**

On August 20, 2015, the SFWIB approved a revision to the On-The-Job Training (OJT) Policy. The policy guides all SFWIB stakeholders with program requirements regarding the use of formula training funds and eligibility for OJT. The policy has three principal benefits: provide minimum standards and suggestions for implementing federally funded OJT, promote an increase in the region's utilization of OJT, and encourage the development of effective protocol to streamline OJT agreements to best meet the needs of the local business community.

SFWIB staff recommends to the Global Talent and Competitiveness Council the following main OJT Policy revisions:

- Formatting for consistency with all SFWIB policies.
- Page 2 - Section V -- Definitions - Language was added to define Registered Apprenticeship (RA) and Work Experience.
- Page 3 - Section IX(A) -- Business Eligibility - Additional eligibility criteria was added for service providers to utilize to determine business eligibility. The criteria include: General Liability Insurance, Form 941, W-9
- Page 5 - Section X(C)(4) -- OJT Agreement Compensation - The minimum hourly rate to execute an OJT agreement was increased from \$12.00 per hour to \$15.00 per hour.
- Page 5 - Section X(C)(5) -- OJT Agreement Compensation - The maximum OJT compensation amount a business can receive per participant increased from \$7,500 dollars to \$11,700 dollars.

- Page 6 - Section XI -- Trade Adjustment Assistance (TAA) - A new section was added to the On-the-Job Training (OJT) Policy, granting service providers the ability to supplement reimbursement rates for co-enrolled trade participants under WIOA by 25 percent, in contrast to the standard TAA limit of 50 percent for OJT. This supplement is subject to the specific conditions outlined in WIOA section 134(c)(3)(H) and is intended to compensate employers for any extraordinary expenses that may be incurred in the course of providing training and supervision for said training.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



# BOARD POLICY

**POLICY  
NUMBER  
POL 100-X**

<b>Title:</b>	SFWIB On-the-Job Training (OJT)		
<b>Effective:</b>		<b>Revised:</b>	
<b>Supersedes:</b>		<b>Version:</b>	

## I. OF INTEREST TO

The On-the-Job Training (OJT) Policy should be of interest to members of the South Florida Workforce Investment Board (SFWIB)/dba CareerSource South Florida (CSSF), SFWIB staff, Contractors (Service Providers), Training Vendors, Businesses, Job Seekers, and Employees in local workforce development area (LWDA) 23 (Miami-Dade and Monroe counties).

## II. PURPOSE AND SCOPE

The purpose of the OJT Policy is to provide all SFWIB stakeholders with program requirements regarding the use of formula training funds and eligibility for OJT.

## III. BACKGROUND

The WIOA includes OJT as one of its approved training services. The OJT program is a work- and evidence-based strategy that provides reimbursements to employers for the extraordinary costs associated with skills upgrade and loss of production time for hiring and training a new employee. The SFWIB provides OJT services via an agreement with a business (public, private non-profit or private for-profit), Service Provider, and an eligible participant.

## IV. STATUTORY AUTHORITIES

- A. [Workforce Innovation and Opportunity Act \(WIOA\) of 2014, Public Law \(Pub. L.\) 113-128 § 3\(44\); 134\(c\)\(H\); 181](#)
- B. Trade Adjustment Assistance (TAA) Act of 1974, as amended, (the Act) [TAA Reauthorization Act of 2015 § 236\(c\)](#)
- C. Code of Federal Regulations (CFR), Title 20 Parts [617](#); [618.635](#); [680.530](#); [680.700-680.840](#); [681.600](#); [683.400](#); [683.410](#)
- D. U.S. Department of Labor Training and Employment Guidance Letter (TEGL) [04-20](#); [19-16](#)
- E. [2 CFR Appendix II, to Part 200](#), Contract Provisions for Non-Federal Entity Contracts under Federal Awards
- F. Florida Statutes, Title XXXI, Chapter [446](#)

Approved By:  
Rick Beasley, Executive Director

## **V. DEFINITIONS**

- A. On-the-Job Training (OJT) - means training by an employer that is provided to a paid participant while engaged in productive work in a job that: a) provides knowledge or skills essential to the full and adequate performance of the job; b) provides reimbursement to the employer of up to 75 percentage of the training wage rate; c) is limited in duration as appropriate to the occupation for which the participant is being trained, taking into account the content of the training, the prior work experience of the participant, and the service strategy of the participant, as appropriate.
- B. Registered Apprenticeship (RA) – means a national training system that combines paid learning on-the-job and related technical and theoretical instruction in a skilled occupation. An apprenticeable occupation is specified by industry.
- C. Work Experience – means a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate and may take place in the private for-profit sector, the non-profit sector, or the public sector.

## **VI. POLICY**

On-the-Job Training (OJT) shall be provided in accordance with the WIOA for eligible adult and dislocated workers, unemployed and underemployed workers, and out-of-school youth participants. The OJT shall be provided through a contract with an employer to hire a participant and provide structured training that imparts the knowledge and skills necessary for the participant to fully perform the duties of the job for which they were hired. The contract shall be signed by all parties prior to the OJT participant beginning the training. Individuals hired as OJT participants shall be employees of the contracted employer.

## **VII. CONFLICT OF INTEREST**

The SFWIB shall not favor a referral from and/or to a member of the SFWIB over another business in the community. OJT placements shall be made based upon what will be most beneficial to the participant.

American Job Center (AJC) staff shall notify the SFWIB whenever an OJT Agreement is connected to an SFWIB member, Service Provider, or employee.

Service providers are prohibited from recommending an agreement or making OJT referrals to businesses who are members of their immediate family or members of families of other Service Provider staff or SFWIB staff.

The AJC shall not enter into an OJT contract with a business to hire a participant who is a relative (member of the family) of the business. Relative is defined as: father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half-brother, or half-sister. (Section 112.3135, Florida Statutes).

## **VIII. REVERSE REFERRALS**

Reverse referral is when the business has identified someone they would like to hire but the individual has demonstrated skills deficiency related to the position's requirements. A

business may refer a job applicant to the Service Provider for potential OJT enrollment. In the case of reverse referrals, the candidate must schedule an eligibility determination and assessment appointment with a Service Provider and must be eligible for WIOA as a dislocated worker or adult. The Service Provider must utilize normal eligibility assessment and enrollment procedures.

Participant's eligibility must be determined prior to employment; no pre-hires or period of employment prior to the execution of an OJT agreement and participant training plan are acceptable.

## **IX. ELIGIBILITY**

### **A. Business**

Prior to entering into an agreement for OJT services with a business, the Service Provider AJC staff shall ensure that the business is eligible.

Businesses that meet the following criteria are considered eligible and may, subject to available funding, enter into an OJT agreement:

1. Located in the State of Florida;
2. Hold valid business tax receipt (formally an occupational license) and/or zoning permit;
3. Maintains Workers Compensation Insurance (if applicable);
4. General Liability Insurance
5. Form 941
6. W-9
7. Active business as verified by Florida Department of State Division of Corporations ([www.sunbiz.org](http://www.sunbiz.org));
8. Business has operated at current location for at least 120 days.

### **B. Participant**

Participants (adult, dislocated workers and youth) that meet the following criteria may, subject to available funding, receive OJT through an executed agreement:

1. Eligible under one of the SFWIB funded programs: WIOA Youth, WIOA Adult, WIOA Dislocated, TANF, Refugee, etc.
2. Not fully skilled in the chosen occupation, is in need of Training Services, and has the skills and qualifications to successfully complete the OJT.
3. Under the WIOA, has received individualized services, which include career planning.

A participant in a registered apprenticeship who is employed as part of that arrangement, may receive OJT and shall be treated as other agreements provided for employed workers as described in § 680.710 under the WIOA.

On-the-Job Training may be provided in same manner as described in § 680.700 under the WIOA for an unemployed participant in a registered apprenticeship.

Individuals eligible for training funds under the Trade Adjustment Assistance (TAA) Reauthorization Act of 2015, shall be provided to co-enrolled participants.

## **X. OJT AGREEMENT**

### **A. Conditions**

1. Participants may not commence training and businesses may not hire prior to the execution of the OJT agreement. The agreement is executed when signed by all required parties, i.e., service provider, business, and participant.
2. The appropriate signatory for the business shall be either the owner where the business is incorporated; a partner where the business is a partnership; or an officer if the business is a corporation. Corporations sometimes designate signatories other than their officers. In such instances, written authority transferring signatory responsibilities shall be obtained by the AJC or youth service provider staff responsible for developing the agreement.
3. OJT may be sequenced with, or accompanied by, other types of training, as applicable under the law.
4. Businesses must agree to establish and maintain records with respect to all matters covered by the OJT agreement; and allow public inspection of all documents, papers, letters or other materials made or received by the business in conjunction with said agreement, unless the records are exempt under federal or state law. Businesses shall retain such records for at least five (5) years from the date of final payment, or until all related federal and state audits or litigation is completed, whichever is later.
5. The business must agree to comply with the provisions of the Certification Regarding Lobbying, Certification Regarding Debarment, Suspension and Other Matters, Public Entity Crime, Florida Clean Indoor Air Act and the Certification regarding a Drug-Free Workplace.
6. The business must agree to comply with the nondiscrimination and equal opportunity provisions of federal or state law.
7. An OJT agreement may be entered into for a registered apprenticeship program to train participants. Said agreements shall be with the employer, and may be used to support the OJT portion of the apprenticeship program which may involve classroom related technical instruction.

### **B. Duration**

1. An OJT agreement shall be limited to the period of time required for a participant to become proficient in the occupation for which the training is being provided.
2. OJT agreements shall not exceed six months of training unless there is documented justification and written approval from the SFWIB Executive Director.

### **C. Compensation**

1. Reimbursement for wages under an OJT agreement shall be based on the hourly wage rate and applicable percentage rate for competencies/skills in the training agreement's outline in accordance with all applicable laws. For purposes of the provision of OJT under this policy, an employer may be reimbursed an amount of the wage rate of a participant, for the extraordinary costs of providing the training and additional supervision related to the OJT.



2. The reimbursement level shall be in accordance with WIOA section 3(44) in an amount up to 75 percent of the participant's hourly wage rate and shall be based on a number of factors, including, but may not be limited to:
  - i. Company size.
  - ii. The characteristics of the participants in accordance with WIOA sec.134(c)(3)(H)(ii)(I), including whether the OJT contract leads to employment for individuals with barriers to employment.
  - iii. Quality of employer-provided training and advancement opportunities.
  - iv. Wage and benefit level of the employee both before and after OJT completion, and relation of training to the competitiveness of the participant.
  - v. Retention of employees from previous OJT agreements.

The service provider shall document the factors used to validate the increase in wage reimbursement levels above 50 percent and up to 75 percent.

3. Shall be limited in duration, as appropriate to the occupation for which the participant is being trained.
4. AJC Provider staff and Youth Provider staff shall not execute OJT agreements for occupations that pay less than an hourly wage rate of \$15.00.
5. Service Providers shall not execute OJT agreements exceeding a total possible business compensation of \$11,700 per participant without prior written SFWIB approval.
6. Participants employed under an OJT agreement shall be compensated by the business at the same rates, (including periodic increases) as similarly situated employees. In no event, however, shall OJT participants be paid less than the higher of the minimum wage specified under the Fair Labor Standards Act of 1938, as amended or the applicable state or local minimum wage.
7. Participants employed under a SFWIB OJT agreement shall receive the same fringe benefits and be subject to the same working conditions granted to regular employees under the same or similar occupational title.
8. Payments to a business under an OJT agreement shall not exceed any program specific federal, state or local guidelines and limitations, for the costs of providing the training and additional supervision related to the training.
9. OJT payments shall not be based on overtime, shift differential, premium pay and other non-regular wages paid by the business to participants.
10. Businesses shall not pay OJT participants in cash.
11. Businesses shall submit certified payroll records, as part of the invoicing process, in order to receive the applicable reimbursement.
12. Businesses shall be reimbursed by the AJC and youth service providers. The final reimbursement shall be made upon the completion of the last competency and when proper documentation has been provided. Reimbursement should coincide with the business' pay period. The reimbursement amounts shall be based upon the relevant funding stream requirements and any waivers at the time of the agreement. In accordance with section XIV of this policy, service providers may

submit a written request to the SFWIB Executive Director to approve an exception to the reimbursement process.

#### **XI. TRADE ADJUSTMENT ASSISTANCE (TAA)**

Co-enrollment of an eligible trade-affected worker in the WIOA dislocated worker program is a proven successful service delivery model that helps ensure TAA participants have access to services and benefits, as appropriate. Although OJT reimbursements are limited to 50 percent in the TAA program, there is no requirement for the WIOA to provide additional reimbursement for TAA participants.

In limited circumstances, as provided in WIOA section 134(c)(3)(H), WIOA can pay up to 75 percent of the wage rate of the WIOA program participant for the extraordinary costs of providing the training and additional supervision related to the training, if available and authorized under state and local policies. There is no OJT wage cap established under the TAA program.

#### **XII. GRIEVANCES AND APPEALS**

Service providers shall advise participants of their right of appeal using either the business' grievance procedures, or those of the SFWIB, if previously agreed upon with the business. If a business elects to use its own grievance procedures, the business must agree to provide information to the SFWIB as to the actions taken under those procedures. If the participant is not satisfied with the outcome after using the business' grievance procedures, the individual may elect to file a grievance with the SFWIB under the SFWIB grievance procedures.

#### **XIII. PROHIBITIONS/LIMITATIONS**

1. Participants shall not be employed to carry out the construction, operation, or maintenance of any part of any facility that is used or to be used for sectarian instruction or as a place for religious worship (except with respect to the maintenance of a facility that is not primarily or inherently devoted to sectarian instruction or religious worship, in a case in which the organization operating the facility is part of a program or activity providing services to participants).
2. OJT agreements shall not be written for part-time employment. Proof of full-time employment shall be established and documented by the business. Verification shall be made by the AJC and youth service providers. Written requests for exceptions shall be made in writing in accordance with section XIV of this policy, prior to execution of an OJT agreement.
3. OJT agreements shall not be written for jobs with a Specific Vocational Preparation (SVP) of two or lower, except for participants who have a documented disability for whom such a placement would be appropriate or where written justification is provided to and approved in writing in accordance with section XIV of this policy. Lack of prior work history or non-English speaking are not to be considered disabilities for the purpose of complying with this provision, but may justify placement into a job with a low SVP.

4. Agreements shall not entered into with a business who has previously exhibited a pattern of failing to provide OJT participants with continued long-term employment and/or wages, benefits, and working conditions that are equal to those provided to regular employees who have worked a similar length of time and are doing the same type of work.
5. A participant shall not be charged a fee by any officer, employee, agent, or representative of the business or service provider for the placement or referral of such individuals in or to a training funded under an OJT agreement or amendments thereof.
6. A participant in a program or activity authorized under title I of WIOA shall not displace (including a partial displacement, such as a reduction in the hours of non-overtime work, wages, or employment benefits) any currently employed employee (as of the date of OJT participation).
7. An OJT funded agreement shall not impair existing contracts for services or collective bargaining agreements. When a program or activity authorized under Title I of WIOA would be inconsistent with a collective bargaining agreement, the appropriate labor organization and employer shall provide written concurrence before the agreement is initiated.
8. An OJT participant shall not be employed in, or assigned to, a job if:
  - a. Any other individual is on layoff from the same or any substantially equivalent job.
  - b. The employer has terminated the employment of any regular, unsubsidized employee or otherwise caused an involuntary reduction in its workforce with the intention of filling the vacancy so created with the OJT participant.
  - c. The job is created in a promotional line that infringes in any way on the promotional opportunities of currently employed workers.
9. OJT funds shall not be used for any political activity, lobbying of federal, state, or local legislators, or to promote or oppose unionization.
10. OJT funds shall not be used to directly or indirectly assist, promote, or deter union organizing.
11. OJT participants shall not be placed in a home-based business.
12. OJT funds shall not be used to encourage or induce a business, or part of a business, to relocate from any location in the United States, if the relocation results in any employee losing his or her job at the original location.

#### **XIV. EXCEPTIONS**

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

**XV. REVISION HISTORY**

<b>Date</b>	<b>Description</b>
August 20, 2015	Revised, approved, and reissued by the SFWIB. This policy supersedes and replaces <b>XXX</b> .

**XVI. RESCISSIONS/CANCELATIONS**

There are no rescissions or cancelations for this policy.



## **SFWIB GLOBAL TALENT COMPETITIVENESS COUNCIL**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 9

**AGENDA ITEM SUBJECT:** SUPPORT SERVICES POLICY

**AGENDA ITEM TYPE:** **APPROVAL**

**RECOMMENDATION:** SFWIB staff recommends to the Global Talent and Competitiveness Council to recommend to the Board the approval of a new Support Services Policy, as set forth below.

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

**STRATEGIC PROJECT:** **Improve service delivery outcomes**

### **BACKGROUND:**

South Florida Workforce Investment Board (SFWIB) staff created a policy to provide guidance on how support services may be made available to Workforce Investment Opportunity Act (WIOA) and Career Advancement Program (CAP) participants. These support services are to assist in the elimination or reduction of barriers that may hinder participation in activities authorized in WIOA and compliance with CAP work activities.

Highlights from the policy are detailed below:

- Page 2 - Section V(H) -- Definitions - The policy defines support services as those services that are necessary to enable an individual to participate in activities. These services include assistance with transportation, assistance with education, assistance with childcare, and other services outlined in WIOA sec. 134(c)(2) and (3).
- Page 3 - Section VI(A) -- Support Services / Eligibility - The policy outlines two criteria for providing support services; (1) that the participant is unable to afford the cost associated with addressing the need, and; (2) is unable to secure the needed service from other resources
- Page 5 - Section VI(I) -- Support Services / Expenditure Limitation and Reporting - The policy outlines support services may be provided contingent upon the availability of funds and linkages to community services.

- Page 6 - Section VI(J) -- Support Services / Support Services Provisions - The policy outlines support services shall be provided to Adults, Dislocated Workers, and Youth, contingent upon the availability of funds, which shall include, but are not be limited to:
  - Linkages to Community Services
  - Transportation Assistance
  - Ancillary Expenses
  - Housing Assistance
  - Child and Dependent Care Assistance
  - Educational Testing Assistance
  - Other Support Services
  - Employment and Training-Related Payments and Fees
  - Reasonable Accommodations for Individuals with Disabilities
  - Legal-Aid Services
  - Needs Related Payments
  
- Page 7 - Section VIII - Incentive Payments - The policy outlines incentive payments shall be offered to eligible WIOA participants who have retained employment for a minimum of six (6) months, with a second incentive payment after an additional six (6) months of employment. The limit on incentive payments is a maximum of one (1) year.

SFWIB staff is presenting the policy to the Global Talent and Competitiveness Council for a recommendation to the Board for approval.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*

		<b>BOARD POLICY</b>		<b>POLICY NUMBER POL 100-X</b>
<b>Title:</b>	<b>Support Services</b>			
<b>Effective:</b>		<b>Revised:</b>	<b>N/A</b>	
<b>Supersedes:</b>	<b>N/A</b>	<b>Version:</b>	<b>00</b>	

**I. OF INTEREST TO**

This policy is applicable to South Florida Workforce Investment Board (SFWIB) dba CareerSource South Florida (CSSF) American Job Centers (AJC), Service Providers, Youth Service Providers, and partners.

**II. PURPOSE AND SCOPE**

The purpose of this policy is to provide guidance to local workforce development area (WDA) 23 regarding the administration, resources and services coordination when providing supportive services and needs-related payments (NRP) to eligible Workforce Innovation and Opportunity Act (WIOA) and Temporary Assistance for Needy Families (TANF) participants. Additionally, this policy establishes the requirements for the use and documentation of WIOA funds for support services and NRP.

**III. BACKGROUND**

The WIOA provides program guidelines for supportive services and needs related payments to enable eligible adults, dislocated workers, and youth to participate in activities authorized under the law. As such, the SFWIB/CSSF established requirements contained within this policy to ensure maximum flexibility as well as to assist in the elimination or reduction of barriers that may hinder eligible participants from participating in activities authorized under the WIOA and in compliance with TANF work activities. Additionally, this policy helps ensure when coordinating with other entities the services and resources are not duplicated and limits are established for the amount and duration of said services.

**IV. STATUTORY AUTHORITIES**

- Workforce Innovation and Opportunity Act (WIOA) of 2014, Public Law 113-128 § 3(59); 129(c)(1) and (2); 134(c)(1)(A)(ii)-(iii); 134(c)(2-3); 134(d)(2)-(3)
- Code of Federal Regulations (CFR) § [680.900](#); [680.910](#); [680.920](#); [680.930](#); [680.940](#); [680.950](#); [680.960](#); [680.970](#); [681.460](#); [681.570](#); [681.640](#)
- U.S. Department of Labor Training and Employment Guidance Letter (TEGL) [19-16](#); [21-16](#); [08-15](#), and [09-22](#)
- CareerSource Florida Administrative Policy [109](#), Supportive Services and Needs-Related Payments
- Florida Statutes Chapters [414](#); [445.024](#); [445.025](#)

Approved By: Rick Beasley, Executive Director	
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## V. DEFINITIONS

- A. Family ([\(20 CFR 675.300\)](#)) – means two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:
1. A married couple and dependent children;
  2. A parent or guardian and dependent children; or
  3. A married couple.
- B. Homeless – means individuals (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6))), or homeless children and youths (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))).
- C. Individual Employment Plan (IEP) – is an individualized career service, under WIOA sec. 134(c)(2)(A)(xii)(II), that is developed jointly by the participant and career planner when determined appropriate by the one-stop center or one-stop partner.
- D. Individual Responsibility Plan (IRP) – means an individualized career service, under WIOA sec. 134(c)(2)(a)(xii)(II), that is developed jointly by the participant and career planner when determined appropriate by the one-stop operator or one-stop partner. This plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve the employment goals.
- E. Individual Service Strategy (ISS) – is a service strategy developed for each youth participant, in accordance with WIOA 129(c)(1)(B), that is directly linked to one or more of the indicators of performance described in WIOA section 116(b)(2)(A)(ii), that shall identify career pathways that include education and employment goals, appropriate achievement objectives, and appropriate services for the youth participant taking into account the assessment. The ISS plan is developed in conjunction with the youth and adopts a customer and strengths-based customized approach that addresses the unique strengths, challenges and needs of each youth participant.
- F. Needs Related Payments – means financial assistance provided to an eligible participant for the purpose of enabling them to participate in training and are a supportive service authorized by WIOA sections 129(c)(2)(G) for youth and 134(d)(3) adult and dislocated workers. Unlike other supportive services, in order to qualify for needs-related payments a participant must be enrolled in training.
- G. One Stop Service Tracking System (OSST) – is a State of Florida system used to track case management activities and to extract data for federal and state level reporting for the Welfare Transition and Food Stamp Employment and Training (FSET) programs.
- H. Support Services – means services such as transportation, child care, dependent care, housing, and needs-related payments, that are necessary to enable an individual to participate in activities authorized under the WIOA.



- I. Temporary Assistance for Needy Families (TANF) – is a time limited program that helps families when parents or other relatives cannot provide for the family's basic needs.

## **VI. SUPPORT SERVICES**

Support services is not an entitlement and shall be based on the unique financial, employment and training needs of the individual. By providing said services, the SFWIB/CSSF shall not be obligated, nor commits its contracted service providers, to approve and/or provide supportive services of any type.

Support services shall be viewed individually and creatively to enable participants to participate in education, training, and work activities. Decisions regarding appropriate support shall, to the fullest extent possible, be made by the career advisor assigned to the participant. The rationale for those decisions shall be well documented in the participant's Individual Employment Plan (IEP), Individual Responsibility Plan (IRP), or Individual Service Strategy (ISS).

When providing support services, it must be ensured that the service could not be provided by another resource, the resource is not readily accessible, or there is a crucial need where referrals to other resources would delay the delivery of the support service that is creating a hardship for the participant.

Support service payments shall not be made for activities in which the participant did not participate; nor shall they be made prior to enrollment into or after exit from the applicable eligible program.

### **A. Eligibility**

Support services shall only be provided to eligible adults, dislocated workers, youth, and TANF participants who are participating in career or training services authorized under WIOA sections 129(c)(2) or 134(c)(2)-(3) and who are unable to obtain supportive services through other programs providing such services. Assessments and all support services provided must be documented in the participants IEP, IRP, or ISS, and must be appropriately recorded in the Employ Miami Dade/Employ Monroe (EMD/EM).

Two of the required criteria for providing support services are when the participant:

1. Cannot afford the cost associated with addressing the need.
2. Is unable to secure the needed service from other resources.

However, if the participant obtains the service(s) or funds for the needed support service(s) from a source other than SFWIB/CSSF, the eligibility criteria that was initially met to receive the said service(s) shall no longer be valid. Therefore, the participant shall not be entitled to a reimbursement of the support service(s) when the service(s) are obtained through other means. This requirement shall not be applicable to youth participants.

Youth shall be enrolled under WIOA Title I-B in order to be eligible. Youth co-enrolled concurrently in Adult and Youth Programs under WIOA Title I-B shall be determined eligible under the applicable programs' criteria in order to receive the respective programs and services.

#### **B. Assessment/Need Determination**

Eligibility for support services shall be established based on an assessment of immediate needs and barriers. The need for support services that would hinder the participant from participating in career services or training activities shall be identified in the completed IEP, IRP, or ISS. Career advisors shall follow up with participants while active in career services or training activities to ensure that all barriers to successful participation are identified and addressed timely; and shall discontinue said services that are no longer required.

#### **C. Required Documentation**

The participant shall provide a copy of all required documentation in order to receive support services. Said documentation shall be maintained in the case file with copies of any additional documentation of need that has been provided and signed by the participant.

#### **D. Duration**

Supportive services shall only be made available to eligible WIOA participants and shall be limited to the established maximum funding amount and time limitations available to qualified participants, per program year as referenced in the SFWIB Support Services Procedures.

#### **E. Service Codes**

The CSSF AJC staff shall use the Employ Florida Service Code Guide to enter the appropriate service codes in Employ Miami Dade/Employ Monroe when participants are either referred to or provided with supportive services. Reference the SFWIB Support Services Procedures, Attachment E–Employ Florida Service Code Guide.

#### **F. Payment Methods**

Support service payments shall be paid directly to or on behalf of an eligible participant. The CSSF AJC shall accept unconditional fiduciary responsibility for issuing federally funded payments on behalf of the SFWIB/CSSF, and as detailed in their respective Workforce Services and Youth Services contracts. Sufficient documentation shall be maintained by the AJC and youth service provider as required to show that the funds are allowable and are used for the intended purpose. Dependent upon the type of support service provided, a variety of payment methods shall be used as appropriate. The AJC and youth service provider shall use the payment method that allows staff to exercise the highest level of oversight, accountability, and internal controls to ensure the support service

provided is used for the intended purpose. A list of allowable payment methods are detailed in the SFWIB Support Services Procedures.

Support services shall only be paid directly to the participant in the form of reimbursements.

#### **G. Separation of Duties**

The AJC and youth service provider shall ensure any staff dispersing support services payments shall be separated in order that no one individual has complete authority or control over an entire financial transaction. All payment records and financial records pertaining to support services payments shall be made available for federal, state, and local monitoring review, and shall meet the financial standards of the SFWIB and all applicable laws, regulations, policies, and procedures.

Strict adherence to this requirement and those of this policy, as well as, the SFWIB Support Services Procedures will ensure checks and balances to mitigate findings and disallowed costs.

#### **H. Vendor Procurement**

In order to streamline the authorization process and maximize allowable expenditures, vendors shall be sourced through a competitive procurement process. Where the SFWIB determines there is an insufficient number of vendors, a cost and services availability comparison shall be required and documented. The AJC and youth service provider staff shall submit a documented comparison with a sole source request to the board for approval. This vendor procurement requirement shall not apply to youth services.

#### **I. Expenditure Limitations and Reporting**

Support service expenditures shall be based on SFWIB/CSSF funding availability and the availability of other community resources, so as to leverage limited program resources to the greatest extent possible.

Amounts that exceed the maximum amount must be approved by the Executive Director prior to the issuance of services. In the event the support service payment does not fully cover the cost of the service the participant must indicate how the entire cost of the service will be paid. This must be documented in the case notes.

Support services that enables WIOA youth participants to participate in training shall count toward the training, pre-apprenticeship, and work experience expenditure requirements. Where the pre-apprenticeship program includes an occupational skills training component, separate from the work experience, WIOA youth programs shall report pre-apprenticeship under both the work experience program element and occupational skills training program element. Additionally, WIOA youth expenditures related to Registered Apprenticeship programs shall count toward the minimum work experience expenditure requirement.

## **J. Support Services Provisions**

Support services shall be provided to Adults, Dislocated Workers, and Youth, contingent upon the availability of funds, which shall include, but are not be limited to:

1. Linkages to Community Services
2. Transportation Assistance
3. Ancillary Expenses
4. Housing Assistance
5. Child and Dependent Care Assistance
6. Educational Testing Assistance
7. Healthcare Referrals
8. Other Support Services
9. Employment and Training-Related Payments and Fees
10. Reasonable Accommodations for Individuals with Disabilities
11. Legal-Aid Services
12. Needs Related Payments (as detailed in Section VII. of this policy)

The AJC and youth service provider staff shall ensure adults and dislocated workers are provided with accurate information regarding the availability of supportive services WDA 23, as well as, referrals to such activities.

## **VII. NEEDS RELATED PAYMENTS**

Needs related payment shall be provided only to individuals enrolled in training services (consistent with 20 CFR [680.930](#), [680.940](#), [680.950](#), [680.960](#), and [680.970](#)) and shall be made to help WIOA participants cover non-training expenses while participating in a training program.

### **A. Eligibility**

#### Adults

Eligible WIOA adults must be employed; does not qualify for, or has ceased to qualify for, unemployment compensation; and be enrolled in a program of training services under WIOA section 134(c)(3).

#### Dislocated Workers

Eligible WIOA dislocated workers shall be unemployed; and

1. Has ceased qualifying for unemployment insurance compensation, or the trade readjustment allowance under the Trade Adjustment Act (TAA); and
2. Be enrolled in a program of training services under WIOA section 134 (c)(3) no later than the end of the 13th week after the most recent layoff that resulted in the determination of the worker's eligibility as a dislocated worker, or if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed six months; or
3. Be employed and did not qualify for unemployment compensation or trade readjustment allowance under the TAA and must be enrolled in a program of training services under WIOA section 134(c)(3).

### Out-of-School Youth (OSY)

Eligible youth participants, ages 18-24, must be enrolled in an educational program or training related service in accordance with the WIOA. In order to eliminate barriers to obtain or retain employment, assistance may be provided to youth participants unable to pay for exams, certifications, or licenses. Other needs related payments may be provided to a youth participant based on an assessment of need in the ISS plan.

Needs related payments shall also be provided to a youth participant while the individual is waiting to begin a training program or during a job search to obtain employment

#### **B. Payment Levels**

WIOA adult and youth payment levels shall be determined pursuant to the federal poverty level (FPL) on a weekly basis in accordance with the documented family size. Reference the SFWIB Support Services Procedures for the specific amounts.

Dislocated workers payment levels shall not exceed the greater of:

1. The weekly level of Reemployment Assistance (RA) benefits for participants who were eligible for RA benefits; or
2. The poverty level for an equivalent period for participants who did not qualify for unemployment compensation due to the qualifying layoff. Weekly payment levels shall be adjusted to reflect the changes in total family income.

### **VIII. INCENTIVE PAYMENTS**

An initial incentive payment shall be provided to an eligible WIOA participant who has retained employment for a minimum of six months. A second incentive payment may be made if the individual remains employed for an additional six months after the initial six months. Incentive payments to a single individual shall not exceed a one year period of time. Incentive payments shall not be included in the support services program year's maximum amount.

Incentive payments to youth shall be permitted for recognition and achievements directly tied to training activities and work experiences. Said payments shall be made in accordance with the all applicable laws, regulations, SFWIB policies, and Support Services Procedures.

### **IX. LIMITATIONS**

Support services shall not be provided using WIOA funding for, but not limited to, the following:

- A. Payment toward goods or services incurred or received prior to determining WIOA eligibility to receive WIOA services.
- B. Fines and penalties, such as for parking tickets and moving violations.
- C. Legal fees, such as bail and restitution.
- D. Debts that have been turned over to a collection agency.
- E. Child support.

- F. The purchase of goods or services that are illegal under any federal, state, local, or municipal law or statute.
- G. The purchase of cigarettes, alcoholic beverages, or firearms.
- H. Union dues.
- I. Other career and training services.

**X. EXCEPTIONS**

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