



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**THURSDAY, DECEMBER 21, 2023**

**9:30 A.M.**

ARPEC School/UA Local 725 Pipefitters  
Large Conference Room  
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/webinar/register/WN\\_wjgmIoTtSEu4r3ERRDichg](https://us02web.zoom.us/webinar/register/WN_wjgmIoTtSEu4r3ERRDichg)

**AGENDA**

1. Call to Order and Introductions
2. Public Comment
3. Chairman's Report
4. Executive Director's Report
  - A. Executive Director Update
  - B. Recommendation as to Approval of the 2024 SFWIB Meeting Calendar
5. Community Presentations
  - A. Council for Adult and Experiential Learning (CAEL) Presentation
  - B. Opportunity Miami Presentation
6. Consent Agenda Items
  - A. Recommendation as to Approval of October 2023 Board Minutes
  - B. Recommendation as to Approval to Accept Workforce System Funding
  - C. Recommendation as to Approval to Allocate Florida College Plan Scholarships
  - D. Recommendation as to Approval to Allocate Funds for the 2024 Future Bankers Training Camp Program
  - E. Recommendation as to Approval to Allocate Additional Funds for the In-School Youth Program Paid Work Experience
7. Executive Committee Update

8. Finance and Efficiency Council Update
  - A. Information – Financial Report – October 2023
9. Global Talent and Competitiveness Council Update
10. Performance Council Update
  - A. Information – WIOA Performance Update
11. Action Items
  - A. Recommendation as to Approval of Rapid Response and Layoff Aversion Contractors
  - B. Recommendation as to Approval Add Occupations to the WDA 23 Targeted Occupations List
  - C. Recommendation as to Approval of a New Training Provider and Programs and New Programs for an Existing Training Provider
  - D. Recommendation as to Approval of Revisions to the On-the-Job Training Policy
  - E. 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."



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 2

**AGENDA ITEM SUBJECT:** PUBLIC COMMENT

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

**RECOMMENDATION:** N/A

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

**STRATEGIC PROJECT:** **National leader in an ROI-focused enterprise**

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 3

**AGENDA ITEM SUBJECT:** SFWIB CHAIRMAN'S REPORT

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

**RECOMMENDATION:** N/A

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

**STRATEGIC PROJECT:** **National leader in an ROI-focused enterprise**

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 4A

**AGENDA ITEM SUBJECT:** SFWIB EXECUTIVE DIRECTOR'S REPORT

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

**RECOMMENDATION:** N/A

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

**STRATEGIC PROJECT:** **National leader in an ROI-focused enterprise**

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 4B

**AGENDA ITEM SUBJECT:** 2024 SFWIB MEETING CALENDAR

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

**RECOMMENDATION:** The SFWIB Executive Director recommends to the Board the approval of the 2024 SFWIB Meeting Calendar, as set forth below.

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

**STRATEGIC PROJECT:** **Maximizing collaborative partnerships**

### **BACKGROUND:**

In accordance with Article III Section C of the South Florida Workforce Investment Board (SFWIB) By-Laws, the Executive Director of the SFWIB shall serve ex officio as the Secretary of the SFWIB. The Secretary shall seek to insure that the proceedings of all SFWIB meetings, SFWIB committee meetings, SFWIB task force meetings, and any other meetings of the SFWIB are noticed and recorded in accordance with the Public Meetings Law of the State of Florida. As the duties are outlined, the Secretary recommends the approval of the 2024 SFWIB Meeting Calendar.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



## South Florida Workforce Investment Board (SFWIB)

### 2024 Schedule of Meetings

**(Subject to Change)**

	Month/Meeting	Date	Time
<b>Councils:</b>	<u>January</u>		
	Executive Committee	January 11, 2024	8:15am
	<u>February</u>		
	Executive Committee	February 8, 2024	8:15am
<b>Global Talent &amp; Competitiveness</b>	Councils	February 15, 2024	8:30am
	SFWIB	February 15, 2024	9:30am
	<u>March</u>		
	Executive Committee	March 14, 2024	8:15am
<b>Performance</b>	<u>April</u>		
	Executive Committee	April 11, 2024	8:15am
	Councils	April 18, 2024	8:30am
	SFWIB	April 18, 2024	9:30am
<b>Finance &amp; Efficiency</b>	<u>May</u>		
	Executive Committee	May 9, 2024	8:15am
	<u>June</u>		
	Executive Committee	June 13, 2024	8:15am
<b>Performance</b>	Councils	June 20, 2024	8:30am
	SFWIB	June 20, 2024	9:30am
	<u>July</u>		
	Executive Committee	July 11, 2024	8:15am
<b>Finance &amp; Efficiency</b>	<u>August</u>		
	Executive Committee	August 8, 2024	8:15am
	Councils	August 15, 2024	8:30am
	SFWIB	August 15, 2024	9:30am
<b>Performance</b>	<u>September</u>		
	Executive Committee	September 12, 2024	8:15am
	<u>October</u>		
	Executive Committee	October 10, 2024	8:15am
<b>Finance &amp; Efficiency</b>	Councils	October 17, 2024	8:30am
	SFWIB	October 17, 2024	9:30am
	<u>November</u>		
	Executive Committee	November 14, 2024	8:15am
<b>Performance</b>	<u>December</u>		
	Executive Committee	December 12, 2024	8:15am
	Councils	December 19, 2024	8:30am
	SFWIB	December 19, 2024	9:30am



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 5A

**AGENDA ITEM SUBJECT:** COUNCIL FOR ADULT AND EXPERIENTIAL LEARNING (CAEL) PRESENTATION

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

**RECOMMENDATION:** N/A`

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

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

**BACKGROUND:**

Council for Adult and Experiential Learning (CAEL) Presentation

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*





**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 5B

**AGENDA ITEM SUBJECT:** BEACON COUNCIL UPDATE – OPPORTUNITY MIAMI

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

**RECOMMENDATION:** N/A`

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

**STRATEGIC PROJECT:** **Partner with economic development**

**BACKGROUND:**

Beacon Council Update - Opportunity Miami.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6

**AGENDA ITEM SUBJECT:** CONSENT AGENDA ITEMS

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

**RECOMMENDATION:** N/A

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

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

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



## SOUTH FLORIDA WORKFORCE INVESTMENT BOARD

**DATE:** 12/21/2023

**AGENDA ITEM:** 2A

**AGENDA TOPIC:** MEETING MINUTES

### SOUTH FLORIDA WORKFORCE INVESTMENT BOARD MEETING MINUTES

**DATE/TIME:** October 19, 2023, 9:30am

**LOCATION:** The DoubleTree by Hilton Miami Airport Convention Center (Hotel Side)  
Salon E and F Room  
711 NW 72<sup>nd</sup> Avenue  
Miami, FL 33126

**Zoom:** [https://us02web.zoom.us/webinar/register/WN\\_wjgmIoTtSeu4r3ERRDichg](https://us02web.zoom.us/webinar/register/WN_wjgmIoTtSeu4r3ERRDichg)

1. **CALL TO ORDER:** Chairman Gibson called to order the regular meeting of the South Florida Workforce Investment Board at 9:34AM on October 19, 2023.

**ROLL CALL:** 28 members; 15 required; 18 present: Quorum established

<b>SFWIB Members Present</b> <ol style="list-style-type: none"> <li>1. Brecheisen, Bruce</li> <li>2. Brown, Clarence</li> <li>3. Canales, Dequasia</li> <li>4. Datorre, Roberto</li> <li>5. del Valle, Juan-Carlos, Vice Chair (Zoom)</li> <li>6. Ferradaz, Gilda</li> <li>7. Garza, Eddie (Zoom)</li> <li>8. Gazitua, Luis (Zoom)</li> <li>9. Gibson, Charles, Chair</li> <li>10. Glean-Jones, Camela (Zoom)</li> <li>11. Lincoln, Michelle Commissioner (Zoom)</li> <li>12. Mantilla, Rene'</li> <li>13. Perez, Andy</li> <li>14. Piedra, Obdulio (Zoom)</li> <li>15. Rod, Denis</li> <li>16. Rolle, Andrei</li> </ol>	<b>SFWIB Members Absent</b> <ol style="list-style-type: none"> <li>19. Androver, Bernado</li> <li>20. Clayton, Lovey</li> <li>21. Diggs, Bill</li> <li>22. Lampon, Brenda</li> <li>23. Maxwell, Michelle</li> <li>24. Rod, Denis</li> </ol> <b>SFWIB Members Excused</b> <ol style="list-style-type: none"> <li>25. Bridges, Jeff</li> <li>26. Chi, Joe</li> <li>27. Grice, Sonia</li> <li>28. Loynaz, Oscar, MD</li> <li>29. Roth, Tom</li> </ol>	<b>SFWIB Staff</b> <ol style="list-style-type: none"> <li>1. Beasley, Rick</li> <li>2. Bennett, Renee</li> <li>3. Kelly, Travis</li> <li>4. Morgan, Ebony</li> <li>5. Perrin, Yian</li> <li>6. Petro, Basil</li> <li>7. Smith, Robert</li> </ol> <b>SFWIB Administration</b> <ol style="list-style-type: none"> <li>8. Almonte, Ivan</li> <li>9. Cubillo, Jorge</li> <li>10. McFarland, Casandra</li> </ol> <b>Miami-Dade County Attorney's Office</b> Gallo, Melissa, MDC Attorney's Office
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17. Scott, Kenneth		
18. Whitaker, David		
<b>Guest Attendees</b>		
1. Diaz, Lupe, Miami-Dade County Public Schools 2. Johnson, Zenani, Florida Chamber of Commerce 3. Llerena, Luis, Miami-Dade County Public 4. Quinn, Robert, Miami-Dade County Public Schools 5. Ryland, Violet, Department of Children and Families		

Agenda items are displayed in the order they are discussed.

## **2. Public Comments**

*Public comments should be two minutes or less.*

No requests to speak were received by the Executive Office. Chairman Gibson opened the floor for comments from the public. None were presented. Item closed.

## **3. Chairman's Report/Executive Committee Update**

During the September 14th Executive Committee meeting, staff provided a demonstration two new tools, the Performance Indicator Tool and Automated Monitoring Tool.

The Performance Indicator Tool monitors our WIOA Performance Indicators in real-time, allowing AJC staff to detect cases with missing employment data every quarter and complete follow-ups. Staff can also closely monitor all 18 needed performance parameters and service efficiency with the program.

The Automated Monitoring Tool (AMT) helps the board achieve the Strategic Goal of Strengthening the One-Stop Delivery System. The tool displays each workforce program's caseload and error rates using the Florida Department of Commerce's programmatic monitoring tool. It also allows users to review and resolve issues with specific cases, thereby lowering error rates. Finally, the tool provides reports to assess performance and trends.

Finally, the Committee addressed staff modifications to certain 2020-2024 Strategic Goals Operational Plan strategic goals. The committee evaluated a summary of revisions and made suggestions. The agenda packet has details for review. The Committee considered conducting a Strategic Planning Retreat before the February 2024 Board meeting to establish the 2024-2028 plan.

No further questions or comments were presented. Item closed.



#### 4. Executive Directors Report

Mr. Beasley delivered the Executive Director's Report, which covered the following federal, state, and local issues in brief:

- House Committee on Education and the Workforce - Subcommittee on Higher Education and Workforce Development hearing titled “Strengthening WIOA: Improving Outcomes for Jobseekers, Employers, and Taxpayers”
  - Reduction of Eligibility Barriers
  - Individual Training Account / Training Goals
  - Promotion of Support Service
- State - REACH Act Letter Grades
- Local - CSSF Automated Monitoring Tool (AMT)

The full report is available for review via the October 19, 2023 SFWIB agenda packet.

No further questions or comments were presented. Item closed.

#### 5. Community Presentations

Chairman Gibson introduced the item; Mr. Beasley welcomed Dr. Lupe Diaz of Miami-Dade County Public Schools for a presentation to Board.

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

No further questions or comments were presented. Item closed.

#### 6. Consent Agenda Items

Chairman Gibson introduced the three consent agenda items and asked whether any should be pulled for further discussion and review.

Mr. Brown asked to pull item 6A. August 17, 2023 meeting minutes.

Chairman Gibson asked for a motion for 6B and 6C.

**Motion:** Mr. Scott presented a motion to approve.

Seconded by: Mr. Brown and **passed without dissent.**



#### **6A. Approval of SFWIB Meeting Minutes – August 17, 2023**

Mr. Brown stated that his attendance should be recorded as "Excused" rather than "Absent" in the minutes from August 17, 2023. Mr. Beasley explained that he was unable to inform Ms. Morgan of Mr. Brown's impending travel prior to the last Board meeting; however, since he was notified in advance, the meeting minutes will be changed to reflect accordingly. Furthermore, he added that members who fail to provide attendance confirmation and are not present at meetings (whether board or council-level) will be recorded as absent. If members cannot attend, please notify Ms. Morgan in advance of the meeting.

**Motion:** Mr. Brown presented a motion to approve with modifications.  
Seconded by: Mr. Scott and **passed without dissent.**

No further questions or comments were presented. Item closed.

#### **7. SFWIB Finance and Efficiency Council Update**

In absence of the Finance and Efficiency (FEC) Chairman, Mr. Tom Roth, Chairman Gibson reviewed the FEC Summary, which provided an overview of items discussed during Executive Committee meetings held on Thursday, July 13 and August 3, 2023.

During this morning's FEC meeting, members reviewed and discussed the financial report for the period ending August 31, 2023. The first 2 months of the new fiscal year seems to be following the historical trend for the period. The budget variances discussed reflects that headquarters expenses are running at 13.1%, adult services are at 11.1% and youth services are at 8.6%. The facilities expenditures are at 11.6% and some of the other programs and projects are at 6.6%.

The cash reconciliation report for August and September 2023 was reviewed and appeared to be in alignment.

Following a review of finances, the Council discussed the Fiscal Monitoring Activity Report for August 1 through September 30, 2023. The College of the Florida Keys was the only one fiscal review was completed and resulted in six findings, which resulted in \$8,521.08 in disallowed costs. Additional information regarding the disallowed costs are detailed in the report, which is in your agenda packets.

OMB reviews were completed for Community Coalition, Lutheran Services, and College of the Florida Keys. Final management decision letters, indicating zero findings, were issued for all three organizations.



Lastly, there were two Plans of Corrective Actions (POCA) reviewed and accepted for Miami Dade College and College of the Florida Keys.

The acceptance of additional workforce system funding in the amount of \$978,617.67 was discussed; details are available in your agenda packet.

The Council finished by discussing the Florida Department of Commerce 2023-2024 Internal Control Questionnaire and Assessment, a state requirement that enables workforce boards to assess internal controls and management's goals. More information will be available when "Action Items" are discussed later in the agenda.

No questions or comments were presented. Item closed.

## **7. Global Talent and Competiveness Council Update**

Chairwoman Ferradaz reviewed the Global Talent and Competiveness Council Summary, which provided an overview of items discussed during this morning's meeting.

Members had an opportunity to share in the Summer Youth Internship Program presentation from Dr. Lupe Diaz of Miami Dade County Public Schools. Members appreciated hearing about the many accomplishments achieved throughout the last eight years.

Following the presentation, the Council discussed the allocation of funds for the 2024 Summer Youth Internship Program, which will allow the board to increase the number of youth served to up to 1,250 participants.

The Council has recommended two action items for approval by consensus of those members present:

- Adding SOC codes and occupations for Home Appliance Repair and Preschool Teachers to the TOL.
- Allocating up to \$50,000 in WIOA Youth Funds to Adults Mankind to hire a youth program worker that will be responsible for providing services onsite at His House Children's Home.

More information will be shared with the Board during the "Action Items" portion of the agenda.

No questions or comments were presented. Item closed.



## 8. Performance Council Update

Chairwoman Canales reviewed the Performance Council Summary, which provided an overview of items discussed during this morning's meeting.

We reviewed the latest performance metrics using the new common measurements tool. Your agenda packet provides details, however, the board has met or surpassed 17 of 18 measures. Please note that our performance is judged in the 2nd and 4th quarters; yellow boxes indicate areas to focus on before the next performance period.

Staff has introduced a number of enhancements to improve on these measures, primarily focused on greater documentation on closed cases, Work Number verification updates, monthly feedback reporting for management, and monthly technical support training for all AJC staff. Members also saw a live version of the Common Measures Tool, which demonstrated how AJCs could use it to conserve time and enhance service.

The Workforce Services Balance Scorecard providing an overview of participants placed through September 30, 2023, reflects 2,154 participants have been placed in unsubsidized employment and four of the nine AJC locations achieved the required 65 percent performance measures standard.

Additionally, new guidelines such as those detailed in the self-attestation and self-sufficiency policies will continue to be implemented by SFWIB staff to help AJCs increase the number of individuals served.

During the council meeting, several creative approaches were discussed to ensure the fulfillment of the previously stated goals for the program year 2023-24. One of these strategies entails organizing a focus group comprising staff from each program. By targeting specific areas for service delivery improvement, we will be better able to comply with performance measures set by federal, state, and local governing bodies. Staff will also use Common Measures Tool for the balanced scorecard employment report projections for the 1st, 2nd, 3rd and 4th quarters after exist.

The Youth Balance Scorecard showed that In-School Youth Programs exceeded the enrollment standard by enrolling 206 participants and the Out-of-School Youth (OSY) program's enrollment performance is on target to meet its goal by the third quarter, which ends on March 31, 2024.





Staff has enhanced oversight and performance management for the current program year and revised the scorecard to correspond with the WIOA-negotiated primary performance indicators to ensure that the youth service providers meet their performance objectives.

Finally, the Council reviewed the Consumer Report Card, which indicates that 40 of the 42 individuals who registered for training throughout the current period have successfully finished the program. Ten of the thirteen individuals who are employed after completing their program do so in the field in which they were trained. The collaboration between the service and training providers is aimed at securing unsubsidized employment for the two remaining participants.

The agenda packet contains full details about the wages generated because of our programs, the average cost of training, and the return on investment.

Mr. Beasley provided additional details regarding the implemented tools and the progress made thus far by the staff. There was further discussion.

No questions or comments were presented. Item closed.

## 9. Action Items

Mr. Beasley introduced action items requiring board approval; each has been brought before its respective Council and approved by consensus of the members in attendance.

### 10A. Approval – Florida Department of Commerce 2023-2024 Internal Control Questionnaire and Assessment

The Internal Control Questionnaire and Assessment (ICQ) was developed by the Florida Department of Commerce, Bureau of Financial Monitoring and Accountability, as a self-assessment tool to help evaluate whether a system of sound internal control exists within the Local Workforce Development Board (LWDB).

**Motion:** Mr. Mantilla presented a motion to approve.

Seconded by: Mr. Rolle and **passed without dissent.**

No additional questions or comments were presented from the members. Item closed.



### **10B. Approval – Add Occupations to the WDA 23 Targeted Occupations List**

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.

[During the voting process, Mr. Mantilla was removed from the meeting.]

**Motion:** Ms. Canales presented a motion to approve.

Seconded by: Dr. Rod and **passed without dissent.**

Mr. Smith and Mr. Beasley explained the process associated with adding additional SOC codes to the TOL.

No additional questions or comments were presented from the members. Item closed.

### **10C. Approval – His House Children’s Home Funding Allocation**

For the program year 2023-24, the SFWIB staff recommends that Adult Mankind Organization, Inc. (AMOR) be granted funding to employ a full-time, on-site staff member to provide workforce services at His House Children's Home. The projected salary and fringe benefits for the position is up to \$65,000. The AMOR youth staff will also be responsible for providing Workforce Innovation and Opportunity Act In-School Youth services.

**Motion:** Mr. Scott presented a motion to approve.

Seconded by: Mr. Mantilla and **passed without dissent.**

No additional questions or comments were presented from the members. Item closed.

### **Next Meeting**

The next SFWIB meeting is scheduled to take place on December 21, 2023. Mr. Scott will be hosting the event at his location. Notifications will be forwarded to all members in advance of the session.

Being as there were no further questions or concerns, the SFWIB Meeting adjourned at 11:42am.



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6B

**AGENDA ITEM SUBJECT:** ACCEPTANCE OF ADDITIONAL WORKFORCE SYSTEM FUNDING

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

**RECOMMENDATION:** The Finance and Efficiency Council recommends to the Board the approval to accept an additional \$61,397 in Workforce System Funding, as set forth below.

**STRATEGIC GOAL:** **IMPROVE SERVICES FOR INDIVIDUALS W/ BARRIERS**

**STRATEGIC PROJECT:** **Improve employment outcomes**

### **BACKGROUND:**

The South Florida Workforce Investment Board received several Notices of Fund Availability (NFA) from the Florida Department of Commerce (formerly Department of Economic Opportunity).

A detailed list of all of the funding notices provided to Workforce Development Area 23 to operate various employment and training services programs is attached for the review of the Council.

Date Received	NFA#	Funding / Program	Initial Award	Award Increase	Total Award Amount	Award Purpose
11/15/23	042352	Disable Veterans	\$57,091.41	\$2,808	\$59,889.41	To hire FL DOC DVOP Staff to serve disable veterans and veterans with barriers to employment.
12/06/23	043171	Supplemental Nutrition Assistance Program (SNAP)	\$117,177	\$58,589	\$175,766	To be used for local administration and direct client services.

<b>TOTAL</b>	<b>\$174,268.41</b>	<b>\$61,397</b>	<b>\$235,665.41</b>
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**FUNDING:** Workforce System Funding

**PERFORMANCE:** N/A

**NO ATTACHMENT**



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6C

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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 recommennd tot the Global Talent and Commpetitive Council the proposed Florida College Plan allocation.

Organizations	2-Yrs Florida College Plan	
	Number	Amount
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*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6D

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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:

PY 22-23 Future Bankers Training Program Outcomes	
# 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*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 6E

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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:** 7

**AGENDA ITEM SUBJECT:** EXECUTIVE COMMITTEE UPDATE

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

**RECOMMENDATION:** N/A

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

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

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 8

**AGENDA ITEM SUBJECT:** FINANCEAND EFFICIENCY COUNCIL UPDATE

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

**RECOMMENDATION:** N/A

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

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

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 8A

**AGENDA ITEM SUBJECT:** FINANCIAL REPORT

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

**RECOMMENDATION:** N/A

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

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

**BACKGROUND:**

The Finance and Efficiency Council's primary goal is to work to ensure that the Board is in good financial health, its assets are protected, and its resources are used appropriately and accounted for sufficiently. Accordingly, the attached un-audited financial report for the month of October 2023 is being presented for review by the Board members.

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*

# FINANCIAL REPORT

FOR THE PERIOD OF:

JULY 1, 2023 THRU OCTOBER 31, 2023  
(UNAUDITED)

**Accompanying Notes to the Financial Report (unaudited)**  
**For the Period of July 1, 2023 through October 31, 2023**

The four (4) months of the new fiscal year appears to be outpacing the same period last year overall by approximately four (4) percent. The projected expenditure rate for four month period is 33 percent. The actual expenditure rate is 23.7 percent.

**Budget Variance Explanations**

- The expenditure rate for Headquarters costs is 32.7 percent. The actual expenditure rate is 0.3 percent lower than the projected expenditure rate.
- The expenditure rate for Adult Services costs is 22.6 percent. The actual expenditure rate is 10.4 percent lower than the projected expenditure rate.
- The expenditure rate for Youth Services costs is 20.3 percent. The actual expenditure rate is 12.7 percent lower than the projected expenditure rate.
- The expenditure rate for Other Programs and Project costs is 26.9 percent. The actual expenditure rate is 6.1 percent lower than the projected expenditure rate.
- The expenditure rate for Facilities costs is 24.2 percent. The actual expenditure rate is 8.8 percent lower than the projected expenditure rate.

<p style="text-align: center;">SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  REVENUE AND EXPENDITURES COMPARED TO BUDGET  <u>AGENCY SUMMARY</u>  FISCAL YEAR 2023/2024  YTD Operations (07/01/23-10/31/23)</p>	
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SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET  
WIOA ADULT  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
							Std Rate= 33.00%
<b>Revenues:</b>							
WIOA	\$ 5,425,427			\$ 5,425,427		\$ 5,425,427	0.0%
TANF				\$ -		\$ -	
DEO				\$ -		\$ -	
Second Year Allocation from FY 22-23	\$ 4,698,531			\$ 4,698,531	\$ 1,972,535	\$ 2,725,996	42.0%
Other				\$ -			
<b>Total Revenue</b>	<b>\$ 10,123,959</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 10,123,959</b>	<b>\$ 1,972,535</b>	<b>\$ 8,151,423</b>	<b>19.5%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 1,898,242</b>			<b>\$ 1,898,242</b>	<b>\$ 572,115</b>	<b>\$ 1,326,127</b>	<b>30.1%</b>
<b>Adult Services</b>	<b>\$ 3,085,225</b>	<b>\$ -</b>	<b>\$ (57,237)</b>	<b>\$ 3,027,988</b>	<b>\$ 750,249</b>	<b>\$ 2,277,738</b>	<b>24.8%</b>
<b>Youth Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Set Aside</b>				<b>\$ -</b>		<b>\$ -</b>	
<b>Facilities Costs</b>	<b>\$ 890,908</b>			<b>\$ 890,908</b>	<b>\$ 300,562</b>	<b>\$ 590,347</b>	<b>33.7%</b>
<b>Training &amp; Support Services</b>	<b>\$ 4,249,583</b>	<b>\$ -</b>	<b>\$ (99,372)</b>	<b>\$ 4,150,211</b>	<b>\$ 342,682</b>	<b>\$ 3,807,530</b>	<b>8.3%</b>
Allocated Funds	\$ 3,520,317			\$ 3,520,317	\$ 342,682	\$ 3,177,635	9.7%
Set Asides	\$ 729,267		\$ (99,372)	\$ 629,895		\$ 629,895	0.0%
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 156,609</b>	<b>\$ 156,609</b>	<b>\$ 6,927</b>	<b>\$ 149,682</b>	<b>4.4%</b>
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Homestead)				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
MDC WORKS Training			\$ 99,372	\$ 99,372		\$ 99,372	0.0%
YWCA, FMU, St. Thomas			\$ 17,508	\$ 17,508	\$ 6,927	\$ 10,581	39.6%
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MIDCPS Summer Youth Internship - 2023				\$ -		\$ -	
Miami-Dade Charter Schools Summer Youth Employment Program				\$ -		\$ -	
Apprenticeship Navigators (MDC)			\$ 39,729	\$ 39,729		\$ 39,729	0.0%
<b>Total Expenditures</b>	<b>\$ 10,123,959</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 10,123,959</b>	<b>\$ 1,972,535</b>	<b>\$ 8,151,423</b>	<b>19.5%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

<p style="text-align: center;">SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  REVENUE AND EXPENDITURES COMPARED TO BUDGET  <u>WIOA DISLOCATED WORKER</u>  FISCAL YEAR 2023/2024  YTD Operations (07/01/23-10/31/23)</p>	
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[illegible]



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET**  
**WIOA RAPID RESPONSE**  
**FISCAL YEAR 2023/2024**  
**YTD Operations (07/01/23-10/31/23)**

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate=    33.00%		
<b>Revenues:</b>							
WIOA	\$ 742,630			\$ 742,630		\$ 742,630	0.0%
TANF				\$ -		\$ -	
DEO				\$ -		\$ -	
Second Year Allocation from FY 22-23	\$ 1,285,102			\$ 1,285,102	\$ 264,141	\$ 1,020,961	20.6%
Other				\$ -			
<b>Total Revenue</b>	<b>\$ 2,027,732</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,027,732</b>	<b>\$ 264,141</b>	<b>\$ 1,763,591</b>	<b>13.0%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 380,200</b>			<b>\$ 380,200</b>	<b>\$ 79,519</b>	<b>\$ 300,681</b>	<b>20.9%</b>
<b>Adult Services</b>	<b>\$ 607,999</b>	<b>\$ -</b>	<b>\$ (11,468)</b>	<b>\$ 596,531</b>	<b>\$ 139,168</b>	<b>\$ 457,363</b>	<b>23.3%</b>
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
<b>Facilities Costs</b>	<b>\$ 178,440</b>			<b>\$ 178,440</b>	<b>\$ 43,963</b>	<b>\$ 134,477</b>	<b>24.6%</b>
<b>Training &amp; Support Services</b>	<b>\$ 861,093</b>	<b>\$ -</b>	<b>\$ (19,909)</b>	<b>\$ 841,184</b>	<b>\$ -</b>	<b>\$ 841,184</b>	<b>0.0%</b>
Allocated Funds	\$ 714,491			\$ 714,491		\$ 714,491	0.0%
Set Asides	\$ 146,602		\$ (19,909)	\$ 126,693		\$ 126,693	0.0%
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 31,377</b>	<b>\$ 31,377</b>	<b>\$ 1,491</b>	<b>\$ 29,886</b>	<b>4.8%</b>
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Homestead)				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
MDC WORKS Training			\$ 19,909	\$ 19,909		\$ 19,909	
YWCA, FMU, St. Thomas			\$ 3,508	\$ 3,508	\$ 1,491	\$ 2,017	42.5%
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MidCPS Summer Youth Internship - 2023				\$ -		\$ -	
Miami-Dade Chater Schools Summer Youth Employment Program				\$ -		\$ -	
Apprenticeship Navigators (MDC)			\$ 7,960	\$ 7,960		\$ 7,960	0.0%
<b>Total Expenditures</b>	<b>\$ 2,027,732</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,027,732</b>	<b>\$ 264,141</b>	<b>\$ 1,763,591</b>	<b>13.0%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

## YTD Operations (07/01/23-10/31/23)

\*see accompanying notes

**TANF**  
**FISCAL YEAR 2023/2024**  
**YTD Operations (07/01/23-10/31/23)**

\*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET  
Layoff Aversion  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 33.00%		
<b>Revenues:</b>							
WIOA	\$ -		\$ 300,000	\$ 300,000	\$ 110,641	\$ 189,359	36.9%
TANF				\$ -			
DEO				\$ -			
Second Year Allocation from FY 22-23				\$ -			
Other				\$ -			
<b>Total Revenue</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 300,000</b>	<b>\$ 300,000</b>	<b>\$ 110,641</b>	<b>\$ 189,359</b>	<b>36.9%</b>
<b>Expenditures:</b>							
Headquarter Costs	\$ -		\$ 300,000	\$ 300,000	\$ 110,641	\$ 189,359	36.9%
Adult Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs				\$ -		\$ -	
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Homestead)				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
MDC WORKS Training				\$ -		\$ -	
YWCA, FMU, St. Thomas				\$ -		\$ -	
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MidCPS Summer Youth Internship - 2023				\$ -		\$ -	
Miami-Dade Charter Schools Summer Youth Employment Program				\$ -		\$ -	
Apprenticeship Navigators (MDC)				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 300,000</b>	<b>\$ 300,000</b>	<b>\$ 110,641</b>	<b>\$ 189,359</b>	<b>36.9%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

**FISCAL YEAR 2023/2024**  
**YTD Operations (07/01/23-10/31/23)**  
 (City of Miami Gardens/City of Opa-Locka/City of Homestead)

\*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET  
WIOA - Get There Faster At-Risk Floridians  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 33.00%		
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO				\$ -			
Second Year Allocation from FY 22-23				\$ -		\$ -	
Other	\$ 171,778		\$ 192,528	\$ 364,306	\$ 121,142	\$ 243,164	
<b>Total Revenue</b>	<b>\$ 171,778</b>	<b>\$ -</b>	<b>\$ 192,528</b>	<b>\$ 364,306</b>	<b>\$ 121,142</b>	<b>\$ 243,164</b>	<b>33.3%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	\$ 32,208		\$ 51,232	\$ 83,440	\$ 32,495	\$ 50,945	38.9%
<b>Adult Services</b>	\$ 139,570	\$ -	\$ -	\$ 139,570	\$ -	\$ 139,570	0.0%
<b>Youth Services</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>				\$ -		\$ -	
<b>Training &amp; Support Services</b>	\$ -	\$ -	\$ 141,296	\$ 141,296	\$ 88,647	\$ 52,649	
<i>Allocated Funds</i>			\$ 141,296	\$ 141,296	\$ 88,647	\$ 52,649	62.7%
<i>Set Asides</i>				\$ -		\$ -	62.7%
<b>Other Programs &amp; Projects</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MiDCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Charter Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 171,778</b>	<b>\$ -</b>	<b>\$ 192,528</b>	<b>\$ 364,306</b>	<b>\$ 121,142</b>	<b>\$ 243,164</b>	<b>33.3%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

**FSET**  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Std Rate= 33.00%							
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO	\$ 782,000			\$ 782,000	\$ 160,402	\$ 621,598	20.5%
Second Year Allocation from FY 22-23	\$ 198,738			\$ 198,738	\$ 198,738	\$ -	100.0%
Other				\$ -			
<b>Total Revenue</b>	<b>\$ 980,738</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 980,738</b>	<b>\$ 359,140</b>	<b>\$ 621,598</b>	<b>36.6%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 183,888</b>			<b>\$ 183,888</b>	<b>\$ 153,418</b>	<b>\$ 30,470</b>	<b>83.4%</b>
<b>Adult Services</b>	<b>\$ 710,544</b>	<b>\$ -</b>	<b>\$ (12,442)</b>	<b>\$ 698,102</b>	<b>\$ 154,495</b>	<b>\$ 543,608</b>	<b>22.1%</b>
<b>Youth Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>	<b>\$ 86,305</b>			<b>\$ 86,305</b>	<b>\$ 49,425</b>	<b>\$ 36,880</b>	<b>57.3%</b>
<b>Training &amp; Support Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Allocated Funds</i>				\$ -		\$ -	
<i>Set Asides</i>				\$ -		\$ -	
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 12,442</b>	<b>\$ 12,442</b>	<b>\$ 1,802</b>	<b>\$ 10,640</b>	<b>14.5%</b>
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>			\$ 3,806	\$ 3,806	\$ 1,802	\$ 2,004	47.4%
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MIDCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Charter Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>			\$ 8,636	\$ 8,636		\$ 8,636	0.0%
				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 980,738</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 980,738</b>	<b>\$ 359,140</b>	<b>\$ 621,598</b>	<b>36.6%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET

RESEA

FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 33.00%		
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO			\$ 282,867	\$ 282,867	\$ 118,291	\$ 164,576	41.8%
Second Year Allocation from FY 22-23	\$ 178,274		\$ (178,274)	\$ -		\$ -	
Other				\$ -			
<b>Total Revenue</b>	<b>\$ 178,274</b>	<b>\$ -</b>	<b>\$ 104,593</b>	<b>\$ 282,867</b>	<b>\$ 118,291</b>	<b>\$ 164,576</b>	<b>41.8%</b>
<b>Expenditures:</b>							
Headquarter Costs	\$ 33,426		\$ 19,611	\$ 53,038	\$ 66,326	\$ (13,289)	125.1%
Adult Services	\$ 129,159	\$ -	\$ 73,518	\$ 202,677	\$ 31,288	\$ 171,389	15.4%
Youth Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Set Aside				\$ -		\$ -	
Facilities Costs	\$ 15,688		\$ 9,204	\$ 24,892	\$ 20,232	\$ 4,660	81.3%
Training & Support Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Allocated Funds				\$ -		\$ -	
Set Asides				\$ -		\$ -	
Other Programs & Projects	\$ -	\$ -	\$ 2,260	\$ 2,260	\$ 444	\$ 1,816	19.7%
Big Brothers Big Sisters				\$ -		\$ -	
Summer Youth Employment (City of Homestead)				\$ -		\$ -	
Summer Youth Employment (City of Opa-Locka)				\$ -		\$ -	
MDC WORKS Training				\$ -		\$ -	
YWCA, FMU, St. Thomas			\$ 691	\$ 691	\$ 444	\$ 247	64.3%
Summer Youth Employment (City of Miami Gardens)				\$ -		\$ -	
MidCPS Summer Youth Internship - 2023				\$ -		\$ -	
Miami-Dade Chater Schools Summer Youth Employment Program				\$ -		\$ -	
Apprenticeship Navigators (MDC)			\$ 1,569	\$ 1,569		\$ 1,569	0.0%
<b>Total Expenditures</b>	<b>\$ 178,274</b>	<b>\$ -</b>	<b>\$ 104,593</b>	<b>\$ 282,867</b>	<b>\$ 118,291</b>	<b>\$ 164,576</b>	<b>41.8%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes



SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET

LOCAL VETERANS  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Std Rate= 33.00%							
<b>Revenues:</b>							
WIOA				\$ -		\$ -	
TANF				\$ -		\$ -	
DEO			\$ 28,246	\$ 28,246	\$ 8,684	\$ 19,562	30.7%
Second Year Allocation from FY 22-23	\$ 6,398			\$ 6,398	\$ 6,398	\$ -	100.0%
Other				\$ -	\$ -	\$ -	
<b>Total Revenue</b>	<b>\$ 6,398</b>	<b>\$ -</b>	<b>\$ 28,246</b>	<b>\$ 34,644</b>	<b>\$ 15,081</b>	<b>\$ 19,562</b>	<b>43.5%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 774</b>		<b>\$ 3,418</b>	<b>\$ 4,192</b>	<b>\$ 1,822</b>	<b>\$ 2,370</b>	<b>43.5%</b>
<b>Adult Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Youth Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>	<b>\$ 5,623</b>		<b>\$ 24,828</b>	<b>\$ 30,452</b>	<b>\$ 13,259</b>	<b>\$ 17,192</b>	<b>43.5%</b>
<b>Training &amp; Support Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Allocated Funds</i>				\$ -		\$ -	
<i>Set Asides</i>				\$ -		\$ -	
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MidCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Charter Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 6,398</b>	<b>\$ -</b>	<b>\$ 28,246</b>	<b>\$ 34,644</b>	<b>\$ 15,081</b>	<b>\$ 19,562</b>	<b>43.5%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

**DISABLED VETERANS**  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
Std Rate= 33.00%							
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO				\$ -			
Second Year Allocation from FY 22-23	\$ 15,658			\$ 15,658	\$ -	\$ -	
Other				\$ -	\$ 10,718	\$ 4,941	68.4%
<b>Total Revenue</b>	<b>\$ 15,658</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 15,658</b>	<b>\$ 10,718</b>	<b>\$ 4,941</b>	<b>68.4%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 1,895</b>			<b>\$ 1,895</b>	<b>\$ 1,296</b>	<b>\$ 599</b>	<b>68.4%</b>
<b>Adult Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Youth Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>	<b>\$ 13,764</b>			<b>\$ 13,764</b>	<b>\$ 9,422</b>	<b>\$ 4,342</b>	<b>68.5%</b>
<b>Training &amp; Support Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Allocated Funds</i>				\$ -		\$ -	
<i>Set Asides</i>				\$ -		\$ -	
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MidCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Charter Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 15,658</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 15,658</b>	<b>\$ 10,718</b>	<b>\$ 4,941</b>	<b>68.4%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET

**WAGNER PEYSER**  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
					Std Rate= 33.00%		
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO	\$ 1,057,444			\$ 1,057,444		\$ 1,057,444	0.0%
Second Year Allocation from FY 22-23	\$ 1,206,968			\$ 1,206,968	\$ 216,401	\$ 990,568	17.9%
Other				\$ -		\$ -	
<b>Total Revenue</b>	<b>\$ 2,264,412</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,264,412</b>	<b>\$ 216,401</b>	<b>\$ 2,048,011</b>	<b>9.6%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	<b>\$ 424,577</b>			<b>\$ 424,577</b>	<b>\$ 76,007</b>	<b>\$ 348,570</b>	<b>17.9%</b>
<b>Adult Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>Youth Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>	<b>\$ 1,839,835</b>			<b>\$ 1,839,835</b>	<b>\$ 140,394</b>	<b>\$ 1,699,441</b>	<b>7.6%</b>
<b>Training &amp; Support Services</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Allocated Funds</i>				\$ -		\$ -	
<i>Set Asides</i>				\$ -		\$ -	
<b>Other Programs &amp; Projects</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MidCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Chater Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 2,264,412</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,264,412</b>	<b>\$ 216,401</b>	<b>\$ 2,048,011</b>	<b>9.6%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD  
REVENUE AND EXPENDITURES COMPARED TO BUDGET**

**TAC  
FISCAL YEAR 2023/2024  
YTD Operations (07/01/23-10/31/23)**

	BOARD APPROVED BUDGET	SAMS Adjustments	Contract Adjustments	AMENDED BUDGET	ACTUAL (07/01/23 THRU 10/31/23)	BUDGET VS. ACTUAL - AMOUNT	BUDGET VS. ACTUAL - RATE
							<b>Std 33.00%</b>
<b>Revenues:</b>							
WIOA				\$ -			
TANF				\$ -			
DEO				\$ -			
Second Year Allocation from FY 22-23	\$ 6,750			\$ 6,750	\$ 2,108	\$ 4,642	31.2%
Other				\$ -	\$ -		
<b>Total Revenue</b>	<b>\$ 6,750</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 6,750</b>	<b>\$ 2,108</b>	<b>\$ 4,642</b>	<b>31.2%</b>
<b>Expenditures:</b>							
<b>Headquarter Costs</b>	\$ 1,266			\$ 1,266		\$ 1,266	0.0%
<b>Adult Services</b>	\$ 4,890	\$ -	\$ -	\$ 4,890	\$ -	\$ 4,890	0.0%
<b>Youth Services</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<i>Set Aside</i>				\$ -		\$ -	
<b>Facilities Costs</b>	\$ 594			\$ 594	\$ 2,108	\$ (1,514)	355.0%
<b>Training &amp; Support Services</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<i>Allocated Funds</i>				\$ -		\$ -	
<i>Set Asides</i>				\$ -		\$ -	
<b>Other Programs &amp; Projects</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<i>Big Brothers Big Sisters</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Homestead)</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Opa-Locka)</i>				\$ -		\$ -	
<i>MDC WORKS Training</i>				\$ -		\$ -	
<i>YWCA, FMU, St. Thomas</i>				\$ -		\$ -	
<i>Summer Youth Employment (City of Miami Gardens)</i>				\$ -		\$ -	
<i>MidCPS Summer Youth Internship - 2023</i>				\$ -		\$ -	
<i>Miami-Dade Charter Schools Summer Youth Employment Program</i>				\$ -		\$ -	
<i>Apprenticeship Navigators (MDC)</i>				\$ -		\$ -	
<b>Total Expenditures</b>	<b>\$ 6,750</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 6,750</b>	<b>\$ 2,108</b>	<b>\$ 4,642</b>	<b>31.2%</b>
<b>Balance of Funds Available</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

\*see accompanying notes

**FISCAL YEAR 2023/2024**  
**YTD Operations (07/01/23-10/31/23)**

\*see accompanying notes



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 9

**AGENDA ITEM SUBJECT:** GLOBAL TALENT AND COMPETITIVENESS COUNCIL UPDATE

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

**RECOMMENDATION:** N/A

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

**STRATEGIC PROJECT:** **National leader in an ROI-focused enterprise**

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 10

**AGENDA ITEM SUBJECT:** PERFORMANCE COUNCIL UPDATE

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

**RECOMMENDATION:** N/A

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

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

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 10A

**AGENDA ITEM SUBJECT:** WIOA INDICATORS OF PERFORMANCE UPDATE

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

**RECOMMENDATION:** N/A

**STRATEGIC GOAL:** **STRONG WORKFORCE SYSTEM LEADERSHIP**

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

### **BACKGROUND:**

South Florida Workforce Investment Board (SFWIB) staff created a Common Measures Tool (CMT) that monitors the negotiated Workforce Innovation and Opportunity Act (WIOA) performance indicators established by the Department of Florida Commerce in real time. The tool provides American Job Center (AJC) staff with the ability to see which cases have exited the system with or without employment using information generated from various employment data sources including the New Hire Report, the Work Number, and the Wage Credit Report. The tool will also allow AJC staff to ensure all follow ups required by federal law have been conducted as the tool identifies cases with incomplete employment data per quarter.

As of November 30, 2023, SFWIB staff has provided an overview of the SFWIB's performance per quarter:

- Quarter 1 (Q1) – SFWIB is meeting or exceeding all performance measures.
- Quarter 2 (Q2) – SFWIB is meeting or exceeding all measures with the exception of the Youth Education and Employment Rate and the Credential Attainment measures, as both are below the negotiated performance standards. AJC staff need to engage at a minimum 42 individuals regarding the Youth Education and Employment Rate and 27 individuals regarding the Youth Credential Attainment to ensure the SFWIB meets the negotiated performance measures.
- Quarter 3 (Q3) - SFWIB is exceeding all performance measures.
- Quarter 4 (Q4) – SFWIB is meeting or exceeding all performance measures with the exception of the Dislocated Worker Credential Attainment measure, as it is below the negotiated performance standard. AJC staff need to engage one individual to ensure SFWIB meets the performance measure.



Based on the information derived from the CMT, AJC staff has begun following up with individuals in Q2 and Q4 performance areas to ensure data is entered properly in order that the SFWIB meets or exceeds the established performance standards. SFWIB staff has identified several strategies to improve performance to ensure all 18 WIOA Indicators of Performance are met, beginning with the implementation of strict follow-up guidelines to ensure each case is properly documented in the Employ Miami-Dade and Employ Monroe systems. The guidelines include:

- The requirement for AJC staff to provide monthly updates regarding the status of follow-up cases;
- Required participation in the hands-on technical assistance SFWIB staff provides regarding the proper documentation of those cases; and
- The implementation of the Work Number verification updates in the CMT to assist with any outstanding employment information which has not been documented.

In addition, SFWIB staff incorporated an overview of the CMT for all Performance Improvement Team (PIT) meetings as well as common measures discussions in monthly focus group meetings.

**FUNDING:** N/A

**PERFORMANCE:** Workforce Innovation Opportunity Act and Wagner Peyser

*ATTACHMENT*





**SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11

**AGENDA ITEM SUBJECT:** ACTION ITEMS

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

**RECOMMENDATION:** N/A

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

**STRATEGIC PROJECT:** **National leader in an ROI-focused enterprise**

**BACKGROUND:**

N/A

**FUNDING:** N/A

**PERFORMANCE:** N/A

*ATTACHMENT*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11A

**AGENDA ITEM SUBJECT:** RAPID RESPONSE AND LAYOFF AVERSION CONTRACTORS

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

**RECOMMENDATION:** The Executive Committee recommends to the Board the approval to authorize staff to negotiate contracts with Rapid Response and Layoff Aversion Request for Proposal respondents; and to allocate an amount not to exceed 575,000 in Workforce Innovation and Opportunity Act funds, as set forth below.

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

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

### **BACKGROUND:**

On August 28, 2023, SFWIB staff released a Request for Proposal (RFP) to solicit multiple economic development and other agencies in local workforce development area (LWDA) 23 to provide an array of layoff aversion and business services strategies to companies for program year (PY) 2023-2024. A total of five organizations responded by the prescribed October 6, 2023 deadline.

The proposals received were evaluated based on the criteria detailed in the RFP. A Public Review Forum was held on October 20, 2023 wherein respondents' preliminary scores were disclosed.

Based off of available funding, SFWIB staff recommends to the Executive Committee to recommend to the board to authorize staff to negotiate contracts with the successful respondents, and to allocate up to \$575,000 in Workforce Innovation and Opportunity Act Dislocated Worker funding, to enhance rapid response and layoff aversion activities and business intermediary teams.

<b>RAPID RESPONSE &amp; BUSINESS SERVICES RESPONDENT</b>	<b>PROPOSED CONTRACT AWARD</b>
Greater Miami Chamber of Commerce	\$150,000
Beacon Council	\$100,000
Florida State Minority Supplier Development Council	\$75,000
CAMACOL	\$125,000
Miami Dade Chamber of Commerce	\$125,000

**FUNDING:** Workforce Innovation and Opportunity Act Dislocated Worker

**PERFORMANCE:** N/A

*NO ATTACHMENT*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11B

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11C

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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*



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11D

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

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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 XXX.

**XVI. RESCISSIONS/CANCELATIONS**

There are no rescissions or cancelations for this policy.



## **SOUTH FLORIDA WORKFORCE INVESTMENT BOARD**

**DATE:** 12/21/2023

**AGENDA ITEM NUMBER:** 11E

**AGENDA ITEM SUBJECT:** SUPPORT SERVICES POLICY

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

**RECOMMENDATION:** The Global Talent and Competitiveness Council recommends 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](#)

## 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.