

AGENDA
CAREER SOURCE ESCAROSA
BOARD OF DIRECTORS
THURSDAY, JANUARY 25, 2024
3:30 P.M.

LOCATION: 6913 N. 9TH Avenue | Pensacola, FL 32504
CALL IN: 872-242-8932 | CONF ID: 647 649 000#

- I. Call Meeting to Order Chair, Board of Directors**
- II. Call for Public Comment**
- III. Reading of Public Disclosures..... Janay Sims**
- IV. Approval of Agenda**
- V. Consent Agenda**
 - Minutes – November 3, 2023
- VI. Items for Consideration**
 - Financial Expenditure and Budget Variances Reports
 - Asset Disposal
 - “Get There Faster” Grant Report | Baptist Customized Training Agreement
 - Update to CSE’s Eligible Training Provider List
 - Application for CSE’s Eligible Training Provider List

Committee Report

 - Administrative Plan Review
New Policy on Insurance Waiver Benefits
- VII. Information Items**
 - Board Governance: Attendance and Vacancies
 - Chief Executive Officer’s Report
 - Items Pending with CLEO (Escambia County)
- VIII. Other Business**
- IX. Adjournment**

NEXT BOARD MEETING – APRIL 18, 2024 | LOCATION: TBD

CareerSource Escarosa

BOARD OF DIRECTORS NOVEMBER 3, 2023 MINUTES

Members Participating: Kathaleen Cole (Chair), Jerry Kersey, Jr., and Jeffrey Hondorp (Member-at-Large)

Members Participating via virtual/teleconference: David Bouvin, Douglas Brown, Jameson Cutchens, Tawana Gilbert, Charlin Knight, and Brianna Russ

Members Not Participating: Lloyd Reshard (Secretary/Treasurer), Anthony Eman, Fred Genkins, Michele Kelson, Michael Listau, Shannon Ogletree, and David Peaden

Ex-Officio Member Participating: Lani Burritt

Others Participating: Dr. Marcus McBride (virtual), Bill Barron, Carol Bono, Brenda Fewox (virtual), and Janay Sims – CareerSource Escarosa

Kathaleen Cole, Chair, called the meeting to order at 2:02 p.m. at the Pensacola Career Center (6913 N. 9th Avenue, Pensacola, FL 32504). Ms. Cole called the roll to confirmed a quorum present. A quorum was confirmed after Dr. Marcus McBride presented information on: JVSG Summit, the upcoming Paychecks for Patriots Hiring Event, and the Region's letter grade.

CALL FOR PUBLIC COMMENT

No public comments were noted.

READING OF PUBLIC DISCLOSURES

Janay Sims noted the public disclosure(s) from the July 20, 2023 CSE Board of Directors meeting.

APPROVAL OF AGENDA

The agenda was reviewed by the Board.

Action Taken: Motion by Jeffrey Hondorp and seconded by Jerry Kersey, Jr. to approve the agenda as printed. Motion carried. (9-Yeas/0-Nays).

CONSENT AGENDA: MINUTES - JULY 20, 2023

The CSE Board of Directors minutes for July 20, 2023, was made available to the board for review.

Action Taken: Motion by Charlin Knight and seconded by Douglas Brown to approve the July 20, 2023 Board of Directors minutes. Motion carried (9-Yeas/0-Nays)

ITEMS FOR CONSIDERATION

FINANCIAL EXPENDITURE AND BUDGET VARIANCES REPORTS (AUGUST 31, 2023)

Reports of financial expenditures, budget and variances for the month ending August 31, 2023, was made available to the board. No inquiries was made regarding the reports.

Action Taken: Motion by Charlin Knight and seconded by Douglas Brown to approve the Financial Expenditure and Budget Variances Reports for the month ending August 31, 2023. Motion carried. (9-Years/0-Nays)

TRANSFER OF PROGRAM FUNDS - WIOA DISLOCATED WORKER TO ADULT

CareerSource Florida Administrative Policy Number 118 provides authority to transfer funds between Adult and Dislocated Worker programs. CSE anticipates a depletion of current funding in the WIOA Adult program prior to the end of Program Year 2023-2024, and has experienced underspending in the WIOA Dislocated Worker program. Current remaining funds in the WIOA Dislocated Worker program is \$715,657.00. Staff is requesting to transfer 74% (\$527,697.30) of Dislocated Worker funds to the WIOA Adult program.

Action Taken: Motion by Jerry Kersey, Jr. and seconded by Douglas Brown to approve to transfer 74% (\$527,697.30) of WIOA Dislocated Worker funds to the WIOA Adult program. Motion carried. (9-Years/0-Nays)

VGP EASTGATE LETTER OF CANCELLATION

A letter from Validus Group Properties (VGP) was made available to the board. The letter serves as a formal notice acknowledging Workforce Escarosa has fulfilled its obligations pursuant to Section 24.23 of its lease; therefore releasing the Letter of Credit provided by Workforce Escarosa effectively immediately.

ELIGIBLE TRAINING PROVIDER LIST POLICY AND PERFORMANCE COUNCIL

A copy of the Eligible Training Provider List Policy and Performance Council was made available to the board.

Revisions were made to CareerSource Florida Administrative Policy 090 - Eligible Training Providers List to conform to requirements established by the U.S. Department of Labor, the REACH Act, and to implement a critical system-wide improvement as part of the Florida Workforce System Transformation Plan.

CSE staff request the board adopt the revised CareerSource Florida Administrative Policy 090 - Eligible Training Providers List.

Action Taken: Motion by Douglas Brown and seconded by Jeffery Hondorp to adopt the revised CareerSource Florida Administrative Policy 090 - Eligible Training Providers List. Motion carried (9-Years/0-Nays)

CAREERSOURCE FLORIDA STRATEGIC POLICY - EDUCATION AND INDUSTRY CONSORTIUMS

A copy of CareerSource Florida Strategic Policy - Education and Industry Consortiums were made available to the board.

CareerSource Florida convened a workgroup to develop a collaborative strategic policy that meets statutory requirements of Senate Bill 240 and aligns all relevant federal, state and local laws and policies. The workgroup included stakeholders from education, business, state government and local workforce development boards.

The policy requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated service delivery area. The chair of the local workforce development board shall appoint the consortium members from a list of criteria described in the policy.

CSE staff request the board adopt the CareerSource Florida Strategic Policy - Education and Industry Consortiums.

Action Taken: Motion by Douglas Brown and seconded by Jeffery Hondorp to adopt the CareerSource Florida Strategic Policy - Education and Industry Consortiums. Motion carried. (9-Yeas/0-Nays).

INTENT TO FORM

A proposed resolution to create the Northwest Florida Workforce Planning Region which consist of local workforce boards 1-CareerSource Escarosa, 2-Okaloosa-Walton, 3-CareerSource Chipola, and 4-CareerSource Gulf Coast was made available to the board. The purpose is to share commonalities of industry sectors, and economic and workforce development.

CSE staff request the board approve the proposed resolution. Further approval will be required by the Boards of County Commissioners.

Action Taken: Motion by Douglas Brown and seconded by Jeffrey Hondorp to approve the proposed resolution to form the Northwest Florida Workforce Planning Region. Motion carried. (9-Yeas/0-Nays).

INDIVIDUAL TRAINING ACCOUNT AGREEMENTS - ONE YEAR PERFORMANCE

With the continuing formulation of the REACH Act language for WIOA Training Provider Agreements, CSE has Training Provider Agreements that expired in September 2023 and one that will expire in November 2023. Florida Commerce has suggested that we extend agreements until the necessary REACH Act language becomes available. CSE request the Training Provider Agreements with the below institutions be extended through June 30, 2024.

- Pensacola State College (PSC)
- Coastal Alabama Community College (CACC)
- Truck Driver Institute (TDI)
- Security Services Training Institute (SSTI)
- University of West Florida (UWF)
- George Stone Technical College (GSTC)
- Locklin Technical College (LTC)
- Fortis Institute (Fortis)
- Reid State Technical College (RSTC)
- Applied Technology Academy

Action Taken: Motion To approve extending the above Training Provider Agreements through June 30, 2024 (September 16, 2023-June 30, 2024). Motion carried. (8-Yeas/0-Nays/2-Abstention: Charlin Knight and Kathaleen Cole).

REGIONAL PLAN FOR CONSOLIDATION

It was noted this item is relative to the Intent to Form.

COMMITTEE REPORTS

BY-LAWS REVIEW COMMITTEE

The By-Laws Review Committee met on September 13, 2023, to review the CSE By-Laws, as required annually.

Recommended revisions to the By-Laws were presented as follows:

ARTICLE III. BOARD MEMBERSHIP AND COMPOSITION, Section 4. Board Member

Recruiting, Vetting and Nomination, page 5, added language:

*Private sector membership is “balanced” by counties. The Chief Executive Officer will contact the general purpose business organization (FloridaWest or Santa Rosa Economic Development Council) from the county where a vacancy will occur/has occurred of the vacancy. The general purpose business organization will contact business leaders in their county (in targeted membership sectors) to solicit nominations. As part of the recruitment/nomination process, a Board Profile Sheet will be completed by each nominee. The general purpose business organization will use the Board Profile Sheet in their process for consideration and selection of a nominee. **The general purpose business organization will submit their recommended nominee(s) to the CareerSource Escarosa Board of Director for review and selection prior to submitting to the Chief Local Elected Official for appointment consideration.***

ARTICLE IV. MEETINGS OF DIRECTORS, Section 1. Meetings, page 5, revised:

*The Board shall meet **every quarter** or as called by the Chair, but in no event shall the Board meet less than four (4) times per year.*

Action Taken: Motion by Charlin Knight and seconded by Douglas Brown to approve the recommendations from the CSE By-Laws Committee. Motion carried. (9-Yeas/0-Nays)

COMPENSATION REVIEW COMMITTEE

The Compensation Review Committee met on August 28, 2023 to review CSE’ salary scale. Information relating to current and proposed pay grade, salary range, and positions was presented. Changes reflected on the proposed pay grade was based on an increase to offer a beginning wage of at least \$15.00 per hour which will align with the proposed state law increase to \$15.00 for hourly employees. It was noted the compression from the increase impacted all pay grades.

Recommendation from the Compensation Review Committee: To approve the proposed CareerSource Escarosa Salary Scale.

Action Taken: Motion by Jerry Kersey, Jr. and seconded by Jeffrey Hondorp to approve the recommendation from the Compensation Review Committee. Motion carried. (9-Yeas/0-Nays).

INFORMATION ITEMS

BOARD GOVERNANCE: ATTENDANCE AND VACANCIES

The CSE Board of Directors attendance and vacancy reports were made available to the board. Attendance has been good. Staff continues to work with entities to fill vacancies.

CHIEF EXECUTIVE OFFICER’S REPORT

Dr. McBride noted:

- FWDA’s upcoming event.

- Encourage all to attend the Paychecks for Patriots event.

RATIFICATION OF DECISION(S) MADE BETWEEN CSE BOARD OF DIRECTORS MEETING
APPLICATION TO THE STATE - CAREERSOURCE ESCAROSA BE NAMED AS ONE-STOP OPERATOR

The Executive Committee met on August 7, 2023 to review the Application to the State - CareerSource Escarosa to be named as One-Stop Operator. After review of the third party's (Florida Workforce Development Association - FWDA) procurement process, FWDA recommended CareerSource Escarosa be selected to serve as One-Stop Operator for PY2023-2026 (3 years) based on the proposal submitted, and the CSE Executive Committee gave support to the recommendation.

Action Taken: Motion by Jeffrey Hondorp and seconded by Tawana Gilbert to approve the recommendation from the Executive Committee. Motion carried. (9-Yes/0-Nays).

OTHER BUSINESS

CSE has a new hire, Carolyn Fries, Workforce Development Director. Ms. Fries is housed at the Greater Pensacola Chamber.

There being no further business, the meeting adjourned.

Lloyd Reshard, Secretary/Treasurer
CareerSource Escarosa

CareerSource Escarosa
Summary of Expenditures
As of December 31, 2023

Program/ Project	NFA ID	Total Funds Available	FY 2023 -2024	Available Funds	Percent	Award
			Life-To-Date Expenditures	Remaining	Expended	End Date
Welfare Transition Program - Oct - June	041900	\$ 1,129,814.00	\$ 1,129,814.00	\$ -	100%	8/31/2023
Supplemental Nutrition Assistance Program	041955	\$ 162,370.18	\$ 162,370.18	\$ -	100%	9/30/2023
Trade Adjustment Assistance-Trade Adjustment Assistance Training	041996	\$ 11,709.12	\$ 11,709.12	\$ -	100%	9/30/2023
Veterans Program-Veterans Incentives	043096	\$ 25,000.00	\$ 25,000.00	\$ -	100%	9/30/2023
Wagner Peyser	041588	\$ 164,704.23	\$ 164,704.23	\$ -	100%	9/30/2023
Welfare Transition Program - July - September	042758	\$ 302,764.00	\$ 302,764.00	\$ -	100%	11/30/2023
Trade Adjustment Assistance-Trade Adjustment Assistance Case Management	041979	\$ 635.87	\$ 635.87	\$ -	100%	12/18/2023
Veterans Program-Disabled Veterans	041042	\$ 73,428.00	\$ 73,428.00	\$ -	100%	12/31/2023
Veterans Program-Local Veterans	041064	\$ 46,007.00	\$ 46,007.00	\$ -	100%	12/31/2023
Apprenticeship Navigator	041672	\$ 62,500.00	\$ 62,500.00	\$ -	100%	6/30/2024
Apprenticeship Navigator	042898	\$ 62,500.00	\$ 23,737.06	\$ 38,762.94	38%	6/30/2024
Get There Faster At-Risk Floridians	040896	\$ 1,037,828.00	\$ 406,228.47	\$ 631,599.53	39%	6/30/2024
Get There Faster Veterans and Military Spouses	040840	\$ 551,078.00	\$ 319,357.09	\$ 231,720.91	58%	6/30/2024
Rapid Response	042815	\$ 110,000.00	\$ 20,561.63	\$ 89,438.37	19%	6/30/2024
Welfare Transition Program - Oct - June	043227	\$ 908,292.00	\$ 246,518.03	\$ 661,773.97	27%	6/30/2024
WIOA - Adult	041509	\$ 703,484.00	\$ 703,484.00	\$ -	100%	6/30/2024
WIOA - Dislocated Worker	041533	\$ 715,657.00	\$ 536,481.14	\$ 179,175.86	75%	6/30/2024
WIOA - Youth	041363	\$ 870,776.00	\$ 831,285.93	\$ 39,490.07	95%	6/30/2024
WP7B SFY23-24 Military Family Employment Advocacy Program	042891	\$ 81,417.00	\$ 29,708.99	\$ 51,708.01	36%	6/30/2024
RESEA	041930	\$ 58,290.00	\$ 58,290.00	\$ -	100%	9/30/2024
RESEA	043068	\$ 72,729.00	\$ 22,695.69	\$ 50,033.31	31%	9/30/2024
Supplemental Nutrition Assistance Program	043149	\$ 108,117.00	\$ 29,437.60	\$ 78,679.40	27%	9/30/2024
Wagner Peyser	042867	\$ 246,190.00	\$ 52,068.63	\$ 194,121.37	21%	9/30/2024
Veterans Program-Disabled Veterans	042332	\$ 72,494.00	\$ 72,493.99	\$ 0.01	100%	12/31/2024
Veterans Program-Local Veterans	042201	\$ 81,152.00	\$ 81,151.99	\$ 0.01	100%	12/31/2024
Florida Healthcare Training	043147	\$ 458,336.00	\$ -	\$ 458,336.00	0%	6/30/2025
Hope Florida – A Pathway to Promise	043019	\$ 73,281.50	\$ -	\$ 73,281.50	0%	6/30/2025
Hope Florida – A Pathway to Promise	043043	\$ 104,687.30	\$ -	\$ 104,687.30	0%	6/30/2025
WIOA - Adult	042786	\$ 796,339.00	\$ 118,692.92	\$ 677,646.08	15%	6/30/2025
WIOA - Dislocated Worker	042839	\$ 579,370.00	\$ 17,489.30	\$ 561,880.70	3%	6/30/2025
WIOA - Youth	042499	\$ 943,321.00	\$ -	\$ 943,321.00	0%	6/30/2025
Veterans Program-Disabled Veterans	043313	\$ 22,332.00	\$ 14,127.51	\$ 8,204.49	63%	12/31/2025
Veterans Program-Local Veterans	043259	\$ 27,957.64	\$ 27,957.26	\$ 0.38	100%	12/31/2025



CareerSource Escarosa
BUDGET VARIANCE REPORT

November 30, 2023

TOTAL AVAILABLE FUNDING	TOTALS				
Available Funding PY 2023-2024		5,108,028			
Carried Forward from PY 2022-2023		2,803,626			
New Funds Added PY 2023-2024		650,744			
Transfers PY 2023-2024		0			
Total		8,562,398			
EXPENDITURES	ACTUAL EXPENDITURES	APPROVED BUDGET	BUDGET VARIANCE Under/(Over)	Expended FAVORABLE 41.67%	
Board Admin Operating Costs (Indirect)	178,335	720,008	541,673	24.77%	
Payroll & Benefits	121,682	387,316	265,634	31.42%	1
Facilities	11,950	27,851	15,901	42.91%	2
Equipment	2,101	2,707	606	77.62%	3
Operational Support	42,603	302,134	259,531	14.10%	4
Board Program Operating Costs Indirect	42,194	383,765	341,571	53.87%	
Payroll & Benefits	28,772	218,609	189,837	13.16%	5
Facilities	2,838	8,289	5,451	34.24%	6
Equipment	497	993	496	0.00%	7
Operational Support	10,088	155,874	145,786	6.47%	8
One Stop Centers, Program Management, WIOA Direct	1,495,483	4,180,844	2,685,361	35.77%	
Payroll & Benefits	728,575	2,581,400	1,852,825	28.22%	9
Facilities	308,783	655,335	346,552	47.12%	10
Equipment	103,470	123,000	19,530	84.12%	11
Operational Support	80,235	109,552	29,317	73.24%	12
DEO State Control	274,420	711,557	437,137	38.57%	13
Tuition, Training and Supportive Services Costs	198,673	852,056	653,383	23.32%	
Tuition/Books/Supplies	164,007	744,755	580,748	22.02%	14
Supportive Services	27,107	86,501	59,394	31.34%	15
Supportive Services/ Transportation	7,560	20,800	13,240	36.35%	16
Contracted Service Costs	578,349	1,774,981	1,196,632	32.58%	
Specialized Training (EWT, OJT, CET)	54,585	150,000	95,415	36.39%	17
Teen Pregnancy Prevention	166,225	0.00	(166,225)	0.00%	18
Youth Customer Services	107,469	776,041	668,572	13.85%	19
Work Experience/Internship Youth	149,240	353,207	203,967	42.25%	20
Summer Youth Employment Program	100,830	150,000	49,170	67.22%	21
Baptist Health Care GTF Floridian at Risk	0	345,733	345,733	0.00%	22
Total Expenditures	2,493,034	7,911,654	5,418,620	31.51%	
Balance Available	6,069,363				
% of Funds Expended				FAVORABLE 41.67%	
Comments					
OVER/-UNDER		\$ 650,744	not included in the budget		



BUDGET VARIANCE REPORT COMMENTS NOVEMBER 30, 2023

Line Item#	Comments
1, 5, & 9	▪ Includes salaries and benefits, employee cost, retirement under spent by - \$-449,129.98/-14.09% of the favorable 41.67%
2, 6, & 10	▪ Includes building rent, maintenance, cleaning, and utilities, over spent \$35,432.91/5.12% of the favorable 41.67%.
3, 7, & 11	▪ Includes equipment and software, overspent by 53,272.37/42.05% of the favorable 41.67%.
4, 8, & 12	▪ Includes items such as advertising, audit, bank, communication, consulting, copier, legal, cloud services, security guard, insurance, meetings, memberships, finance charge, postage, publication& subscriptions, equipment rental, office supplies, staff training, travel, outreach, job fairs, work verification, PEO fees, under spent \$-103,577.01/-18.25% of the favorable 41.67%.
13	▪ DEO merit staff salaries and benefits paid and controlled by the State Wagner Peyser DVOP and LVER, under spent \$-22,086.28/ -3.10% of the favorable 41.67%.
14	▪ Expenditures are based on the number of customers determined eligible for ITA's under spent \$-146,332.87/-19.65% of the favorable 41.67%. The Budget includes the approved 40% of available Adult and Dislocated Workers program funds for ITA's in accordance with the DEO sliding scale calculation five-year average for PY2023. We are currently at 30.57 % of the Adult and Dislocated Workers program expenditures rate. (40%/12*5=16.67%).
15	▪ Expenditures are based on the number of customers determined eligible for supportive services under spent \$-8,938.07/-10.33% of the favorable 41.67%.
16	▪ Transportation expenditures are under \$-1,107.36/-5.32% of the favorable 41.67%.
17	▪ The OJT providers/agreements under spent \$-7920.06/-31.83% of the favorable 41.67%.
18	▪ Youth Teen Pregnancy Prevention Contracts expenditures are over spent \$166,225/100% had no budget is part of #21 budget the two combined overspent \$117,054.98 of the favorable 100.00%. this program ended August 2023.
19	▪ Youth Services Sub-Awards expenditures are under spent. ▪ \$-215,906.91/-27.82% of the favorable 41.67%.
20	▪ Youth Work Experience Sub-Awards expenditures are overspent \$2,058.43/.58% of the favorable 41.67%.
21	▪ Summer Youth Employment Program expenditures are under spent \$49,170.02/32.78% of the favorable 100.00%, this program ended August 2023.
22	▪ Get There Faster At-Risk Floridians/ Baptist Health Care Contract expenditures are under spent \$-144,066.94/-41.67% of the favorable %.

- All funding combined the expenditures are under \$-803,751.79/ -10.16% of the favorable 41.67% of the budget.
- Funding not included in the budget \$650,744 is new funds added Florida Health Care Training \$458,336, WIOA Hope Program \$104,687, WP Hope Program \$73,282, and additional RESEA \$14,439.

**CAREERSOURCE ESCAROSA
ACTION ITEM
ASSET DISPOSAL LIST**

Date: January 25, 2024

ITEM FOR DISCUSSION

As Escarosa purchases new computers/equipment for staff or client use, there is a need to dispose of the old equipment. CSE retains some computers that are not broken or obsolete to use for parts and for new or temporary programs.

All disposal of property is in accordance with Uniform Guidance Part 200.313 and at the direction of the Board of Directors.

A list of old equipment that CSE would like to write-off for disposal is attached.

All operating systems, software and data have been wiped with DBAN to DOD standards. The working equipment will be given to non-profit organizations with preference given to George Stone and Locklin Technical Schools.

RECOMMENDATION

The Board of Directors approve to write-off and dispose of items on CSE's Asset Disposal List.

ERWDB TAG #	DESCRIPTION	MANUFACTURER	SERIAL #	PURCHASE DATE	REASON
1573	DR-2580C	CANON	DG348351	2008	Obsolete
1579	DR-2580C	CANON	DG348609	2008	Obsolete
1591	DR-2580C	CANON	DG349464	2009	Obsolete
1592	DR-2580C	CANON	DG349469	2009	Obsolete
1643	37" LCD FLATSCREEN	SAMSUNG	AUBY3CSS500951	6/12/09	Obsolete
1705	DR-2580C	CANON	DG364006	10/12/10	Obsolete
1708	DR-2580C	CANON	DG364048	02/2011	Obsolete
1806	DR-2580C	CANON	DG366675	6/6/11	Obsolete
1825	LATITUDE E6420	DELL	17YM4R1	10/4/11	Obsolete
1952	32IN LCD HDTV	LG	311RMZL5S861	12/2013	Obsolete
1960	OPTIPLEX 9020	DELL	G0P2J02	3/5/14	Obsolete
1961	OPTIPLEX 9020	DELL	G0P1J02	3/5/14	Obsolete
2007	OPTIPLEX 9030	DELL	152NTX1	3/4/15	Obsolete
2010	OPTIPLEX 9030	DELL	912NTX1	3/4/15	Obsolete
2011	OPTIPLEX 9030	DELL	H02NTX1	3/4/15	Obsolete
2014	OPTIPLEX 9030	DELL	HY1NTX1	3/4/15	Obsolete
2015	OPTIPLEX 9030	DELL	HFZH942	3/19/15	Obsolete
2026	OPTIPLEX 3030	DELL	G8CM822	4/13/15	Obsolete
2028	OPTIPLEX 3030	DELL	FXMM822	4/13/15	Obsolete
2029	OPTIPLEX 3030	DELL	H8CM822	4/13/15	Obsolete
2039	OPTIPLEX 9030	DELL	77M0B02	3/3/16	Obsolete
2040	OPTIPLEX 9030	DELL	CCM0B02	3/3/16	Obsolete
2042	OPTIPLEX 9030	DELL	D2M0B02	3/3/16	Obsolete
2046	OPTIPLEX 9030	DELL	6BM0B02	3/3/16	Obsolete
2049	OPTIPLEX 9030	DELL	FLQZ902	3/3/16	Obsolete
2066	OPTIPLEX 3030	DELL	7W4X922	5/9/16	Obsolete
2068	OPTIPLEX 9030	Dell	DKNY902	5/23/2016	Obsolete
2185	M60 - WiFi	Meraki	Q2KD-K6LL-M74W	4/21/2020	New Wireless System
2186	M60 - WiFi	Meraki	Q2KD-5Z3V-5ERK	4/21/2020	New Wireless System
2187	M60 - WiFi	Meraki	Q2KD-QJKN-6PK4	4/21/2020	New Wireless System

Get There Faster: Veterans and Military Spouses								
LWDB	Eligible Applicants	Participants	Participants Recv'd Career Services	Participants Recv'd Training Services	Participants Recv'd Supportive Services	Participants Recv'd Credentials	Participants Employed	Exits
1	22	8	4	4	8	0	0	2
2	60	59	59	52	59	26	34	28
4	32	31	23	18	26	16	26	25
15	113	113	98	104	105	31	32	59
17	20	16	16	15	16	9	4	9
21	150	130	130	55	130	34	62	65
22	33	32	30	23	31	10	11	11
Statewide	430	389	360	271	375	126	169	199

Get There Faster: At Risk Floridians								
LWDB	Eligible Applicants	Participants	Participants Recv'd Career Services	Participants Recv'd Training Services	Participants Recv'd Supportive Services	Participants Recv'd Credentials	Participants Employed	Exits
1	57	18	18	15	18	11	12	4
9	65	65	63	60	60	1	16	18
12	199	197	194	140	197	90	47	139
23	96	95	10	86	86	42	60	35
Statewide	417	375	285	301	361	144	135	196

Get There Faster: Low-Income Returning Adult Learners								
LWDB	Eligible Applicants	Participants	Participants Recv'd Career Services	Participants Recv'd Training Services	Participants Recv'd Supportive Services	Participants Recv'd Credentials	Participants Employed	Exits
4	36	35	35	15	35	13	16	24
11	379	226	167	224	225	191	52	169
13	61	57	53	55	53	52	41	32
14	567	111	108	102	111	56	26	43
19	71	70	48	44	70	42	27	46
Statewide	1114	499	411	440	494	354	162	314

* Career Services, Training Service and Supportive Services represent the number of unduplicated individuals who received these services.

WORKFORCE ESCAROSA INC
Vendor Activity
From 7/1/2022 Through 1/22/2024

Vendor Name	Effective Date	Document Number	Expenses	Document Description
BAPTIST HEALTH CARE	6/29/2023	#0001	78,517.49	MEDICAL ASSISTANT/ PHLEBTOMY TRAINING
BAPTIST HEALTH CARE	11/30/2023	0002	22,289.23	MEDICAL ASSISTANT INTERN AND PHLEBOTOMY TECH INTERN
BAPTIST HEALTH CARE	11/30/2023	0003	15,646.67	PHLEBOTOMY TECH INTERN
			<u>116,453.39</u>	
Total BAPTIST HEALTH CARE			<u>116,453.39</u>	

AGREEMENT TO PROVIDE CUSTOMIZE TRAINING
Between
WORKFORCE ESCAROSA, INC dba CAREERSOURCE ESCAROSA
And
BAPTIST HEALTH CARE CORPORATION
CUSTOMIZE TRAINING TARGETED INDUSTRIES 22-23

1. PARTIES

This Customize Training Agreement is made and entered into this 6 day of October 2022 between Workforce Escarosa, Inc. dba CareerSource Escarosa located at 6913 North 9th Avenue, Pensacola, FL 32504, and Baptist Health Care Corporation, a Florida not for profit corporation (Baptist Health" or "Baptist Health Care") located at 1717 North E Street Pensacola, FL 32501

2. NOTICES

Any notice or communications given pursuant hereto by any party shall be in writing and mailed by registered or certified mail, postage prepaid, or by express mail to the following:

Marcus L. McBride, PhD
Chief Executive Officer
6913 North 9th Avenue
Pensacola, FL 32504
Christine Johnson, VP of Human Resources
~~Jennifer Grove, VP of External Relations~~
Baptist Health Care
1717 North E Street
Pensacola, FL 32501

3. BASIS FOR AGREEMENT

- 3.1** CareerSource Escarosa is a 501(c) (3) non-profit organization appointed and designated by the Escambia and Santa Rosa Board of County Commissioners to act as the Local Workforce Development Board for Region 1 of the State of Florida under provisions of the "Workforce Innovation and Opportunity Act of 2014." CareerSource Escarosa has requested and received certification as the Region 1 Workforce Development Board by CareerSource Florida, the State of Florida Workforce Development. CareerSource Escacrosa is empowered to administer the Employed Worker Training Program, as authorized under the federal Workforce Innovation and Opportunity Act (WIOA) of 2014, Public Law 113 128, for the purpose of providing grant funding for continuing education and training of currently employed employees at existing businesses located in Escambia and Santa Rosa County, Florida.

- 3.2 CareerSource Escarosa received funding under the Get There Faster At-Risk Floridians Project and identified BAPTIST HEALTH CARE as a qualified organization eligible to receive funding. BAPTIST HEALTH CARE is committed to the training employed workers as described in the proposal submitted by CareerSource Escarosa (A copy of which is attached hereto and incorporated herein as “**Exhibit A**”).
- 3.3 BAPTIST HEALTH CARE warrants that the information agreed upon in the grant proposal, “**Exhibit A**”, is true, correct and complete in all material aspects and that such application may only be amended by prior approval of CareerSource Escarosa and subject to mutual agreement by all parties. Baptist Health will provide employees the choice when selecting a training provider in order to remain in compliance with the Eligible Training Provider and other Individual Training Account requirements unless it is customized training, On the Job Training or as referenced in the CareerSource Escarosa approved directives.
- 3.4 CareerSource Escarosa is prepared to provide funds for eligible employees not to exceed **\$828,000.00** (CFDA # 17.258) as outlined in the approved Budget, a copy of which is attached hereto and incorporated herein as “**Exhibit C.**” These funds shall be expended solely for the purpose of the approved program budget on a reimbursement and performance method of payment. Use of these funds must follow all applicable WIOA laws, rules, and regulations and must be consistent with the WIOA PY2021 Annual Funding Agreement (between USDOL and DEO). The WIOA PY2021 Annual Funding Agreement is located at: <http://floridajobs.org/grants-management/grants-management/lwdb-grant-resources>
- 3.5 BAPTIST HEALTH CARE agrees to list all local job openings with CareerSource Escarosa BAPTIST HEALTH CARE will be assigned a CareerSource Escarosa Account Manager and will communicate all necessary information to list open positions. This does not preclude BAPTIST HEALTH CARE from utilizing other forms of hiring.
- 3.6 BAPTIST HEALTH CARE agrees funds will not be used to directly or indirectly assist, promote, or deter union organizing.
- 3.7 BAPTIST HEALTH CARE agrees funds will not be used to directly or indirectly aid in the filling of a job opening which is vacant because the former occupant is on strike or locked out in the course of a labor dispute or the filling of which is otherwise an issue in a labor dispute involving a work stoppage.

- 3.8** BAPTIST HEALTH CARE agrees to provide education and work skills needed by at-risk Floridians as described in the proposal submitted by CareerSource Escarosa to serve *At-Risk Floridians* under the Get There Faster Grant.

4. TERM OF AGREEMENT

The term of this Agreement shall commence upon execution of the last required signature, and shall remain in effect until the completion of stated purpose, as outlined in Section 3.2 above. BAPTIST HEALTH CARE is to complete all of the training specified in **Exhibit B** by September 1, 2023 or to the satisfaction of CareerSource Escarosa, whichever is earlier. Training may begin as of the approved date however no grant funds may be disbursed for program expenses incurred prior to final execution of this agreement.

5. PAYMENTS

- 5.1 Schedule.** Payments shall be made to BAPTIST HEALTH CARE on a performance basis. Prior to the start of training BAPTIST HEALTH CARE will submit the full name, social security number and date of birth of all males born after 1960 that are scheduled to participate in approved training. Training of these individuals will not commence until registration of Selective Service is verified by CareerSource Escarosa. Those males born after 1960 that are not Selective Service registered will be ineligible for participation in this program and no reimbursement will be made by CareerSource Escarosa.

BAPTIST HEALTH CARE will provide completed employee profiles, grievance forms, copies of the I-9 or Driver's License and Social Security Card, along with certificates of completion for every performance measure for each eligible employee who participated in training. BAPTIST HEALTH CARE will submit certificates of completion as outlined in **Exhibit "B"**. Completed profiles, grievance forms, I-9s, and certificates must be submitted as both a hard paper copy and USB or electronically. If at any time it appears that funds are not going to be expended according to the proposal submitted, CareerSource Escarosa reserves the right to de-obligate funds from this agreement.

- 5.2 Final Payment.** BAPTIST HEALTH CARE shall submit the final invoice for reimbursement within five (5) days of the expiration of this Agreement. CareerSource Escarosa shall withhold final payment until all documentation specified within this agreement received.
- 5.3 Availability of Funds.** CareerSource Escarosa's liability under this Agreement is contingent upon the continued availability of legislatively appropriated and allocated funds. BAPTIST HEALTH CARE agrees that CareerSource Escarosa shall be the final determiner of the availability of such funds.

6. REQUIREMENTS OF BAPTIST HEALTH CARE

6.1 During the term of this Agreement, BAPTIST HEALTH CARE agrees to:

- (a) Comply with all applicable federal, state and local laws related to the execution of the program described in "Exhibit A & Exhibit B"; and
- (b) Cooperate with CareerSource Escarosa in every reasonable way to ensure the successful delivery of the training program. Specific training objectives are described in "Exhibit A & Exhibit B", which includes all provisions required by section 445.003, Florida Statutes.
- (c) Maintain compliance under the Workforce Innovation and Opportunity Act (WIOA) as guidance and implementation are ongoing.
- (d) Prior to the start of training submit the full name, social security number and date of birth of all males born after 1960 that are scheduled to participate in approved training.
- (e) Provide training under this agreement for existing eligible full-time employees with the clear understanding that trainee wages cannot fall below \$13.00 per hour after training. Trainee wage rate shall be the same as wages paid to employees who are similarly situated in similar occupations and have similar training, experience and skills. BAPTIST HEALTH CARE will maintain attendance and payroll records.
- (f) Adhere to health and safety standards established under Federal and State law. BAPTIST HEALTH CARE shall keep records of participant injuries and illnesses in accordance with the provisions of Part 1904 of Title 29 of the Code of Federal Regulations.
- (g) Be bound by the Drug-Free Workplace Regulatory Requirements that are specified in the Drug-Free Workplace Act of 1988, Public Law 10-690, Title V, Subtitle D; 41 U.S. code 701 et seq; 29 CFR Part 98, Federal Register 54CFR 4946.
- (h) Provide invoicing which must include reporting the amount of BAPTIST HEALTH CARE resources and/or leveraged funds provided in category and dollar amount along with invoices provided to BAPTIST HEALTH CARE by Training Provider and/or Educational Institutions.
- (i) For each eligible trainee, BAPTIST HEALTH CARE must provide the following to CareerSource Escarosa:
 - Completed 2022-2023 employee profiles (completed prior to training);
 - Grievance forms (initialed and signed prior to training);
 - Certificate of completion for each training; and
 - I-9 form and/or Driver's License/Social Security Card.
- (j) Under current Workforce Innovation and Opportunity Act of 2014 guidance, an applicant's current INS status must be verified to be

determined eligible for services and/or receive training, a Permanent Alien Resident card is currently valid for duration of 10 years and then renewal is required/recommended. BAPTIST HEALTH CARE will provide current INS information to support applicant's right to work within the U.S

- (k) Contractors with CareerSource Escarosa must agree to allow CareerSource Escarosa, The Department of Economic Opportunity, USDOL, and USDHHS access to any records directly related to this program. Records must be maintained for five (5) years subsequent to the conclusion of this program. All invoices, employee profiles and certificates must be submitted to the CareerSource Escarosa administrative office in the form of one (1) paper copy along with an electronic version of all items contained in the paper version via emailed electronically to EWT@careersourceescarosa.com All confidential information should be sent encrypted and password protected.

6.2 Status Updates. During the term of this Agreement, BAPTIST HEALTH CARE shall provide CareerSource Escarosa with immediate notification if a deviation from the proposal occurs. BAPTIST HEALTH CARE also agree to respond within 48 hours to any inquiries by CareerSource Escarosa regarding status on training and/or expenditures. This information is not a replacement for the other reports and audits, which may be required elsewhere in this Agreement.

6.3 Final Program and Budget Report. Within fifteen (15) days of the expiration of this Agreement, BAPTIST HEALTH CARE will provide CareerSource Escarosa with certification that the training program has been completed in compliance with the terms and conditions of this Agreement. Further, BAPTIST HEALTH CARE will provide a report that shall specify:

- (a) 168 employed employees trained by BAPTIST HEALTH CARE in conjunction with this training program;
- (c) sufficient documentation for identification of all participants that would allow access through the automated student databases pursuant to section 1008.39 Florida Statutes or electronic listings by social security number for calculation of performance measures and any other outcomes deemed pertinent to CareerSource Escarosa; and
- (d) all documentation listed in section 6.1.

6.4 Audit and Records. During the term of this Agreement, BAPTIST HEALTH CARE agrees to comply with the following requirements:

- (a) Maintain books, records, and documents (including electronic storage media) in accordance with generally accepted accounting procedures and practices which sufficiently and properly reflect all revenues and expenditures for funds provided by CareerSource Escarosa under this

agreement for a period of five (5) years after conclusion of the Agreement. The aforesaid records, books, documents, and other evidence shall be subject at all times to inspection, review, or audit by representatives of CareerSource Escarosa, state personnel of the Office of the Auditor General, Office of Comptroller, or other state personnel authorized by CareerSource Escarosa;

- (b) submit all bills for fees or other compensation for services or expenses in detail sufficient for a proper pre-audit and post-audit;
- (c) maintain financial records and reports related to funds paid to any parties for work on the matters which are the subject of this Agreement; and
- (d) include these record-keeping requirements in contracts and subcontracts entered into by BAPTIST HEALTH CARE with any party for work required under terms of this Agreement.

6.5 Follow-up. BAPTIST HEALTH CARE will respond to quarterly follow-up checks on trainee employment status by CareerSource Escarosa staff for a period of up to 5 years after the final invoice.

6.6 Liability. BAPTIST HEALTH CARE assumes the risk of any claims, suits, judgments or damages arising from BAPTIST HEALTH CARE performance of, or failure to perform, the tasks and duties which are the subject of this Agreement, or from BAPTIST HEALTH CARE participation in the program. BAPTIST HEALTH CARE shall indemnify, defend, and hold CareerSource Escarosa harmless from all claims, suits, judgments or damages arising out of intentional acts, negligence or omissions resulting from BAPTIST HEALTH CARE performance of the tasks and duties which are the subject of this Agreement.

6.7 BAPTIST HEALTH CARE signature below verifies there is a current I-9 form on file for each participant employee that verifies date of birth, American citizenship or right-to-work, and that this information will be provided to the location specified by CareerSource Escarosa and/or State of Florida Agency, and/or a department of the US Federal Government within 48 hours of request. However, as specified in Section 1008.39(4), Florida Statutes, the information which, if released, would disclose the identity of the person to whom the information pertains or disclose the identity of the person's employer is confidential and exempt from the provisions of Section 119.07(1), Florida Statutes. Any evaluations published subsequent to the training program may not identify the employer or any individual participant. Should BAPTIST HEALTH CARE not have a completed I-9 on file, BAPTIST HEALTH CARE will make copies of the trainee's Social Security Card and Driver's License prior to the start of training. This documentation will serve as an alternative to the I-9.

6.8 Independent contractor. BAPTIST HEALTH CARE shall act as an independent contractor and not as an employee of CareerSource Escarosa in the performance of

the tasks and duties which are specific obligations of BAPTIST HEALTH CARE pursuant to this Agreement.

- 6.9 Non-discrimination and harassment-free workplace. BAPTIST HEALTH CARE shall not discriminate against any person, applicant or employee employed in the performance of this Agreement, or against any applicant for employment because of race, color, national origin (including limited English proficiency [LEP]), religion, sex, marital status, age, disability, political affiliation, or belief, on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States. BAPTIST HEALTH CARE will maintain compliance with OMB Uniform Guidance 2CFR 200. BAPTIST HEALTH CARE shall provide a harassment-free workplace, with any allegation of harassment given priority attention and action by management.
- 6.10 Public Entity Crimes. BAPTIST HEALTH CARE affirms that at no time has it been convicted of a Public Entity Crime pursuant to section 287.133(2)(a), Florida Statutes, and recognizes that such a conviction during the term of this Agreement may result in termination.
- 6.11 Workers' Compensation Coverage. BAPTIST HEALTH CARE affirms that it is aware of the provisions of Chapter 440 (Workers' Compensation) of the Florida Administrative Code (FAC) which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that chapter. BAPTIST HEALTH CARE affirms that it will comply with such provisions before commencing the performance of the work under this contract. The provision shall apply to the extent provided by federal laws, rules and regulations.
- 6.12 Grievance Procedure. BAPTIST HEALTH CARE shall maintain a grievance procedure to handle any grievances or complaints that the participant may have. If BAPTIST HEALTH CARE does not have a grievance procedure, BAPTIST HEALTH CARE shall use the Workforce grievance procedures. If BAPTIST HEALTH CARE elects to use its own grievance procedures, BAPTIST HEALTH CARE must advise all participants of their right to appeal through the grievance procedures.
- 6.13 Retention of the employee in unsubsidized employment following the completion of the training. BAPTIST HEALTH CARE shall use its best endeavors to retain the trainee in unsubsidized full time employment following the successful completion of the training. In case BAPTIST HEALTH CARE decides not to retain the trainee as a full time permanent employee, it must provide CareerSource Escarosa with the reason(s) why.
- 6.14 Clean Air and Water Act. When applicable, if this Contract is in excess of

\$100,000, the Contractor shall comply with all applicable standards, orders or regulations issued under the Clean Air Act as amended (42 U.S.C. 7401), Section 508 of the Clean Water Act as amended (33 U.S.C. 1368 *et seq.*), Executive Order 11738 and Environmental Protection Agency regulations (40 CFR part 15). The Contractor shall report any violation of the above to the contract manager

6.15 No trainee shall be hired under the present agreement if nepotism exists.

7. TERMINATION

7.1 In the event that BAPTIST HEALTH CARE materially defaults in the performance of any duty, obligation, covenant or agreement imposed on it or made by it in this Agreement, then CareerSource Escarosa shall provide to BAPTIST HEALTH CARE notice of such default. BAPTIST HEALTH CARE shall have fifteen (15) days within which to initiate action to correct the default and thirty (30) days within which either to cure the default or to demonstrate to the satisfaction of CareerSource Escarosa that corrective action has been taken and will likely result in curing the breach. In the event that BAPTIST HEALTH CARE fails to cure the default, CareerSource Escarosa will have the right to terminate this Agreement.

7.2 BAPTIST HEALTH CARE shall, subject to the provisions of Chapter 119, Florida Statutes, permits public access to all public documents or other materials prepared, developed or received by it in connection with the performance of its obligations or the exercise of its rights under this Agreement. CareerSource Escarosa may terminate this Agreement if BAPTIST HEALTH CARE fails to allow such public access.

8. LEGAL REQUIREMENTS

8.1 With respect to its interpretation, construction, effect, performance, enforcement, and all other matters, this Agreement shall be governed by, and be consistent with, the laws of the State of Florida and the Government of the United States, both procedural and substantive. Any and all litigation arising under this Agreement shall be brought in the appropriate State of Florida court in Escambia, Florida.

8.2 No provision for automatic renewal or extension of this Agreement shall be effective.

9. MODIFICATION

This writing contains the entire Agreement of the parties. No representations were made or relied upon by any party, other than those that are expressly set forth in this Agreement.

No agent, employee, or other representative of any party is empowered to alter any of the terms of this Agreement, unless done in writing and signed and approved by an executive officer of CareerSource Escarosa or designee for CareerSource Escarosa and an executive officer of BAPTIST HEALTH CARE. The parties agree to renegotiate this Agreement if revisions of any applicable State of Florida laws, regulations or decreases in allocations make changes to this Agreement necessary.

10. GENERAL CONDITIONS

10.1 Limitations on the recovery of damages which are specifically provided by Florida Statute or general law or established by rulings of Florida courts shall apply to this Agreement. Such limitations include, but are not limited to, the following:

- (a) CareerSource Escarosa is liable for damages only to the extent provided by section 768.28, Florida Statutes;
- (b) CareerSource Escarosa is not bound by any agreements to indemnify, hold harmless, or for liquidated damages or cancellation charges; and
- (c) no provision of this Agreement shall be construed as a waiver by CareerSource Escarosa of any right, defense or claim which CareerSource Escarosa may have in any litigation arising under the Agreement. Nor shall any Agreement provision be construed as a waiver by CareerSource Escarosa of any right to initiate litigation.

10.2 In providing funds for instruction pursuant to this Agreement, materials that relate to the methods of manufacture or production, potential trade secrets, business transactions, or proprietary information received, produced, ascertained, or discovered by employees of the district school boards, community college district boards of trustees, or other personnel employed for the purposes of this section are confidential and exempt from the provisions of Section 119.07(1), Florida Statutes. CareerSource Escarosa may seek copyright protection for all instructional materials and ancillary written documents developed wholly or partially with state funds as a result of instruction provided pursuant to this Agreement. Subject to CareerSource Escarosa's approval, BAPTIST HEALTH CARE may seek copyright, patent and other intellectual property interest in the products and materials developed by BAPTIST HEALTH CARE. However, BAPTIST HEALTH CARE shall provide CareerSource Escarosa, upon request, with unrestrained use of any such materials that may be copyrighted, patented or otherwise protected.

10.3 BAPTIST HEALTH CARE acknowledges and agrees that any expenses incurred above and beyond the grant funds shall be borne and paid by BAPTIST HEALTH CARE. BAPTIST HEALTH CARE will be liable for any project funds used for purposes other than payment of costs listed in the approved budget "Exhibit C."

BAPTIST HEALTH CARE shall indemnify and hold CareerSource Escarosa harmless for claims made by any third party with respect to expenses incurred or activities performed by BAPTIST HEALTH CARE in fulfillment of this project.

10.4 BAPTIST HEALTH CARE is encouraged to utilize "minority business enterprises", as defined in Section 288.703, Florida Statutes, as subcontractors or sub-vendors when permitted under this Agreement and should report all such usage to CareerSource Escarosa.

10.5 The following activities shall not be funded with any of the grant funds: (a) political activity, lobbying of state or federal or local legislators, or to promote or oppose unionization, judiciaries or agencies; (b) religious or anti-religious activity.

10.6 BAPTIST HEALTH CARE agrees to apply Davis Bacon, as amended (40 U.S.C. 276a to 276a-7) and as supplemented by Department of Labor (DOL) regulations 29 CFR part 5, wage rates to projects funded under this Agreement which involve construction, alteration or repair including painting and decorating of buildings, projects, and works which are not ordinarily done by BAPTIST HEALTH CARE regular work force. Prior to making any determination not to pay Davis Bacon wages for any construction type program funded by this Agreement, Contractor shall request a waiver from CareerSource Escarosa.

10.7 To the extent this contract is funded in excess of **\$50,000.00** of funds made available from the federal government BAPTIST HEALTH CARE shall comply with all applicable standards, orders, or regulations issued under section 306 of the Clean Air Act, as amended (42 USC 7401 et seq.), section 508 of the Clean Water Act, as amended (33 USC 1368 et seq.), Executive Order 11738, and Environmental Protection Agency regulations (40CFR Part 15) and the Federal Water Pollution Control Act (33 U.S.C. 1251 et seq.), as amended, and the State of Florida Energy conservation Plan issued in compliance with the Energy Policy and Conservation Act of 1988 as amended. (Pub. L. 94-163, 89 Stat. 871). [53 FR 8079, 8087, Mar. 11, 1988, as amended at 60 FR 19639, 19645, Apr. 19, 1995]. The contractor shall report any violation of the above to the CareerSource Escarosa contact listed in this agreement.

10.8 BAPTIST HEALTH CARE is aware that federal funds may not be used for the purchase or improvement of land, or the purchase, construction, or permanent improvement of any building or facility. If any property has been constructed or substantially renovated, through the unlawful use of state or federal funds, the federal government shall be entitled to a lien against said property.

10.9 BAPTIST HEALTH CARE will comply with environmental standards which may be prescribed pursuant to the following: (a) institution of environmental quality

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control measures under the National Environmental Policy Act of 1969 (P.L. 91-190) and Executive Order (EO) 11514; (b) notification of violating facilities pursuant to EO 11738; (c) protection of wetlands pursuant to EO 11990; (d) evaluation of flood hazards in flood plains in accordance with EO 11988; (e) assurance of project consistency with the approved State management program developed under the Coastal Zone Management Act of 1972 (16 U.S.C. 1451 et seq.); (f) conformity of Federal actions to State (Clean Air) Implementation Plans under Section 176(c) of the Clean Air Act of 1955, as amended (42 U.S.C. 7401 et seq.); (g) protection of underground sources of drinking water under the Safe Drinking Water Act of 1974, as amended, (P.L. 93-523); and (h) protection of endangered species under the Endangered Species Act of 1973, as amended, (P.L. 93-205).

- 10.10** Any organization or entity, whether public or private, which sponsors a program financed partially by state funds or funds obtained for a state agency shall, in publicizing, advertising or describing of the sponsorship of this project, use the following statement "Sponsorship by BAPTIST HEALTH CARE, CareerSource Escarosa and the State of Florida." If the sponsorship referenced is in written material, the words "State of Florida" shall appear in the same size letters or type as the name of the organization.
- 10.11** When issuing statements, press releases, requests for proposals, bid solicitation, and other documents describing projects or programs funded in whole or in part with Federal money, all awardees receiving Federal funds, shall clearly state (1) the percentage of the total cost of the program or project which will be financed with Federal money, and (2) the dollar amount of Federal funds for the project or program.
- 10.12** The Parties agree to comply with all the terms and provisions of this Agreement including and incorporating herein the following specified Attachments:
Exhibit A – Get There Faster Region 1 Grant A
Exhibit B – Anticipated Outcomes/Reimbursement Schedule
Exhibit C – Approved Training Budget
Exhibit D – Certification Regarding Drug-Free Workplace
Exhibit E – Nondiscrimination and Equal Opportunity Assurance
- 10.13** BAPTIST HEALTH CARE acknowledges and agrees that it is not debarred or suspended from doing business with the federal government under 29 CFR part 98, subpart C. Should BAPTIST HEALTH CARE become debarred or suspended from doing business with the federal government BAPTIST HEALTH CARE shall provide immediate written notice to the CareerSource Escarosa Chief Executive Officer, and such debarment or suspension shall be deemed a material default.

10.14 BAPTIST HEALTH CARE acknowledges that under the Workforce Innovation and Opportunity Act of 2014, the act supports a year of transition and implementation. Additional or clarifying guidance may be received during the first year from federal, state or local level wherein a resulting change or modification may be needed. Any change or clarification will be notified 10 days prior to any effective date.

10.15 This Agreement is executed in duplicate originals.

IN WITNESS WHEREOF, the parties have caused their hand to be set by their respective authorized officials hereto.

WORKFORCE ESCAROSA, INC.
dba CAREERSOURCE ESCAROSA

BY: M. McBride
Marcus L. McBride, PhD
Chief Executive Officer

Signature Date: 10/20/2022

BY: Kathaleen Cole
Kathaleen Cole
President of the Board of Directors

Signature Date: 10/20/2022

BAPTIST HEALTH CARE CORPORATION
1717 North E Street Pensacola, FL 32501

BY: Christine Johnson
NAME: VP HR

TITLE: VP HR
Signature Date: 10/20/2022 11:19 AM CDT

M. McBride
10-20-2022

Get There Faster – WIOA Competitive Grants

CareerSource Escarosa, Region 1

&

Baptist Health Care – Grant Proposal

Fiscal Year 2021-2022

Project Narrative

CareerSource Escarosa, Local Workforce Development Board Region 1, will partner with Baptist Health Care to provide opportunities for training, career, and support services by maximizing funding to direct participants identified as At-risk Floridians in career paths for in-demand, middle-to-high wage jobs.

Never before has the healthcare industry been more focused on workforce development. The pandemic has exacerbated longstanding hiring challenges the industry has faced. In fact, in a recently released study, the Florida Hospital Association (FHA) notes that as of April 2021, 11% of RN positions in our hospitals across the state are vacant, which is slightly above the national average of 9.9%. More concerning is a 25 percent turnover in RN positions in Florida in the last year alone, including one in three critical care nurses. This is the highest rate for RN turnover ever reported by the FHA. This study also concluded that Florida faces a shortfall of 59,100 nurses by 2035 (37,400 RNs and 21,700 LPNs.) In addition to facing shortfalls in nursing staff, our industry is facing shortfalls in qualified candidates for entry-level positions that are the first steps on the career ladders that often lead to an LPN or RN position.

Baptist Health Care is seeing these same hiring challenges. Locally led, governed, and headquartered in Pensacola, Florida, Baptist Health Care is a not-for-profit health care organization that has been committed to living out our Mission of helping people throughout life's journey for 70 years now. As a proud member of the Mayo Clinic Care Network, Baptist continuously strives to be a national leader in quality and service. Baptist Health Care includes three hospitals, four medical parks, Andrews Institute for Orthopaedics & Sports Medicine and a large network of primary care and specialty physicians.

As one of the largest non-governmental employers in northwest Florida, Baptist is constantly seeking ways to become an employer of choice for those in our community who are skilled, certified and licensed and ways to collaborate to grow the future healthcare workforce. Baptist directly partners with area high school health career academies, technical centers, Pensacola State College and University of West Florida to meet the continued and increasing pressures of filling the critical entry-level positions of Phlebotomy Technician and Medical Assistant among others.

In order to supplement the talent supply, Baptist has had to deliver their own certification programs. For years, they have delivered a Phlebotomy School, and now, in partnership with CareerSource EscaRosa, Baptist will increase the number of times that school is offered per year and add a new Medical Assistant program as well. This collaborative approach will provide two options for industry recognized certification programs to eligible participants interested in entering healthcare professions as a Phlebotomy Technician or Certified Clinical Medical Assistant.

There will be a 12week Phlebotomy Intern program where participants will get paid classroom and "on the job" training experience. They will be supervised by the Phlebotomy Educator who will teach and observe progress throughout the program. Upon successful completion of the program, graduates will be eligible to sit for the certification exam which is paid for by Baptist Health Care. The certification test is completed through the American Society of Clinical

Pathology and is called the phlebotomy technician exam. This is a widely recognized national certification for laboratory professionals. Upon certification, the participant will be eligible to apply for a permanent position.

The second program is a Medical Assistant Intern program that will be offered twice a year for a 6month period. During this period, participants will get paid classroom and "on the job" training. The participants will be supervised by the MA Educator who will be responsible for providing the training and monitoring progress. Upon completion, participants will be able to sit for the certification exam paid for by Baptist Health Care. The certification that will be obtained is from the National Healthcareer Association (NHA) and is a Certified Clinical Medical Assistant certification. Once certified, the participant will be eligible for a permanent position.

The goal of these programs is to allow At-Risk Floridians access to education and certification to become employable within the healthcare system. The physician practice leaders and the phlebotomy manager are invested in the success of these programs as they are experiencing high vacancy rates due to such a tight labor market.

These programs can lead to future healthcare careers if the participants choose to grow professionally. Many of our Phlebotomy Technicians have gone on to higher level positions. There are opportunities for Phlebotomy Techs to become Medical Assistants, Licensed Practical Nurses and Registered Nurses within our hospital. Those in the Medical Assistant program could go on to leadership positions or may also choose to advance their career clinically by becoming a Licensed Practical Nurse, Registered Nurse, etc. In both fields, there are opportunities for participants to gain positions in leadership.

During the program period and with future employment, the participants will be eligible to participate in our benefits program. That includes a tuition reimbursement program. If the participant decides to return to school during their employment, our Life Long Learning program will help reimburse the candidate for those costs. There is also opportunity for funding of relevant certifications beyond those included in the program.

These programs will be beneficial for the participant, our community and Baptist Health Care. There is a need for these type of programs in our community and Baptist Health Care seeks to be the trusted partner to help transform our community and healthcare.

Explain the need within the service area for the target population served by the proposed program. For example, current local and comparative demographic data, documented number of individuals experiencing the need, etc.

At-Risk Floridians need education and work skills to help them become employable so they can be self-sufficient and withdrawn from government assistance. Baptist Health Care offers a Phlebotomy Intern Program and a Medical Assistant Program. Both of these programs provide paid education hours for people to come and learn the technical skills needed to be successful in the field of Phlebotomy or Medical Assisting. The students will receive classroom education as well as "hands on" training in one of our departments. Upon completion of either program, the student will be eligible to take the certification exam. Baptist Health Care will cover the costs of materials and testing fees so the students can focus on engaging in the program. The goal of the programs is to certify and

hire the students upon completion of the course, providing a pathway to prosperity in the high demand field of healthcare.

In Pensacola, FL, the population is 52,642 and of that population, only 23,751 people are employed. The median age is 36.9 and the poverty rate is 17.4%. That is 4.7% higher than the state of Florida average poverty level. This data shows us that we have room for opportunity to connect our community member to employment opportunities. As far as education, 92.7% of the population has a high school diploma or higher. 37.2% of the population has a bachelor's degree or higher. The largest demographic living in poverty are females ages 25-34. The median annual income for a household in Pensacola is \$50,493, which is approximately \$15,000 below the national average.

In Florida, unemployment claims averaged around 7,000 in 2018 and 2019. In April of 2020, the cases increased 507,0000. That is higher than 4 other states that are most comparable and had the most similar impact. As of the week ending August 21, 2021, the unemployment claims have dropped to 8,270 but we still have opportunity to bring that number down to the pre-pandemic average. (Data from DOL Unemployment Weekly Claims and Data Unemployment insurance weekly claims by state).

If we drill down closer to the neighborhood where Baptist Hospital, the system's flagship hospital, Baptist Medical Towers and all administrative support services are housed, and where the training programs will be delivered, we find that Floridians living in this area are struggling even more. This neighborhood is comprised of Pensacola's Census Tracts 4, 5, 16 and 18. With a total population of 9,838 in this area surrounding the main campus, the poverty rate is twice as high as the city average and the median income is less than 60% of the area median income. Labor participation rate in this area is as low as half of the labor force participation rate in other areas of Pensacola and 7 – 30% of the full-time workers in this area live in poverty. The high school graduation rate of this neighborhood is half of the city average, and the college completion rate is only 14% of the average in other parts of Pensacola. The zip code in which the program will be run is 32501, which has the highest rate of Under-18 Poverty in Escambia county of 56.2% per the Florida Chamber's Prosperity Project.

Added emphasis on recruitment from the neighborhood into these programs will be implemented through a combination of tactics including through Baptist's Faith Health Network which works with congregations in the neighborhood to provide services, education and supports that improve quality of life.

Baptist Health Care is seeking to be a partner in the community to provide education and employment opportunities to those who are At-Risk Floridians. Our goal is the increase the amount of employed people in our community. From 2018 to 2019, the number of employed people in Pensacola only increased 0.148%. This proves there is a need to help the members of our community find employment that will allow them to be independent from government assistance.

How will these programs propose to address the need for the target population?

Many individuals seeking training for employment are unable to commit to the training programs due to their immediate financial need. This program attempts to provide a paid training opportunity as well as an on-the-job paid training component to give individuals the opportunity to earn a livable wage, gain an industry recognized credential, as well as gain valuable hands-on experience.

This partnership directly addresses a major need for the target population. As CareerSource Escarosa works with many individuals who fall into the at-risk population category, this training program creates a talent pipeline for one of Region 1's targeted industry sectors. The partnership also establishes a path to multiple careers in healthcare beyond the 2 credentials presented in this proposal.

The Phlebotomy and Medical Assisting Programs will address the need for the At-Risk Floridian target population by providing an opportunity to receive a paid education and training. By receiving this education and training, the candidate will be eligible to take a certification exam. This will help make these individuals employable and eligible to apply for benefit eligible positions within Baptist Health Care.

What types of services will be offered and by whom, including the frequency and duration of services?

The local workforce development board for region 1, CareerSource Escarosa, will provide case management, job coaching and community outreach for eligible participants throughout the program to promote success for the program participants by coaching him/her throughout the training for credential attainment, employment, and ongoing career goals to promote self-sufficiency.

The case manager and job coach will focus outreach efforts with individuals demonstrating interests in the healthcare sector who are WIOA eligible and/or receiving TANF or SNAP benefits. The case manager and job coach will host bi-weekly information sessions to recruit participants into the paid training and internship program for the healthcare sector. The paid training and work experience component leading to the industry recognized credentials and employment opportunities are incentives desired by many individuals in need of training for more favorable employment who are unable to participate in the traditional, unpaid training programs.

The case management team will meet with each program participant to develop individual employment goals and to discuss career pathways in the healthcare sector. The case management team will provide at minimum 2 monthly contacts with the program participants to discuss progress towards goals and/or any perceived barriers to program completion. The case management team will determine participants' work readiness factors and provide pre-employment skills training and make referrals for other identified needs to set each candidate up for success in the program.

The Phlebotomy Intern Program will be offered every 12 weeks as long as the business need is present. This program is offered by the Phlebotomy Educator within the Phlebotomy Department at Baptist Health Care. There is a two-week classroom lecture phase and a ten

week clinical rotation phase. This class is full time from 6am – 2:30pm. There is a posted class schedule through September of 2022.

The Medical Assistant Program will be offered twice a year as long as the business need is present. The program will run for 6 months. The program will be a paid full-time position so every student will be paid for the hours spent in the program and they will be offered BHC benefits. Approximately 20 hours per week will be spent in a classroom setting and 20 hours per week will be spent in our physician practices for “on the job training”.

How the program will collaborate with various partners to address customer needs and avoid duplication of services?

CareerSource Escarosa provides training and various resources for WIOA eligible and TANF/SNAP eligible participants daily. Our case management system captures information to address customer needs, make referrals as necessary, and prevent duplication of services. CareerSource Escarosa also hosts quarterly consortium meetings that are inclusive of training providers, various community partners, including Vocational Rehabilitation, local school districts and post-secondary education partners.

Baptist Health Care will maintain partnerships with all of our local schools who offer similar programs. These programs are not meant to replace the school programs but they are meant to help supplement. The need in our community for phlebotomy techs and medical assistants far exceeds the qualified students graduating from programs. We will still actively recruit any eligible Phlebotomy Tech or Medical Assistant from any program.

Eligibility requirements

Individuals must at minimum meet WIOA eligibility requirements:

- Meet the required income level
- 18 years of age or older
- U.S. Citizen or eligible to work in the U.S.
- Compliance with Selective Service, if required.

Eligible candidates for the training program must also have a high school diploma or GED and pass the Baptist Hospital pre-employment assessments. Those assessments include, but are not limited to, a urine drug screen, nicotine (cotinine) screen, level II background check (fingerprints), education verification, and reference and employment verification.

Outreach methods used to recruit and retain customers

CareerSource Escarosa and Baptist healthcare will use various forms of media to promote the training opportunity for participants. CareerSource Escarosa will have targeted case

management efforts to recruit individuals and provide intensive case management support to customers to help with program completion and retention.

Baptist Health Care will post these opportunities on our website at www.JoinBaptist.org. Those postings will also be advertised on a variety of sites such as EmployFlorida, Indeed, CareerBuilder, ZipRecruiter, LinkedIn, Glassdoor, etc. Baptist will also utilize their Faith and Community Health team to promote these programs to residents in the neighborhood and beyond.

Describe how the program will engage employers.

CareerSource Escarosa serves a resource for every employer in Escambia and Santa Rosa Counties. Employers in Region 1 rely on CareerSource Escarosa to post positions, screen applicants, host job fairs and recruiting events as well as provide training grants for their organizations. To date, CareerSource Escarosa has job orders for healthcare organizations posted on Employ Florida and actively engaged with the 3 largest healthcare providers in region 1.

Baptist Health Care will also be the employer for these participants. There is a need for these skill sets in our facilities, and we have created these programs in response to our vacancy rates and market demands at Baptist Health Care. It is the intention of Baptist Health Care to hire successful graduates from both programs who meet all certification and background requirements.

EXHIBIT B
Anticipated Outcomes/Target Population

Please check the boxes that apply to the anticipated outcomes of the proposed project.

Will improve the long-term wage levels of trainees	Will improve the short-term wage levels of trainees
Will create new jobs within our company	Would help prevent company from having to relocate operations
Will lower employee turnover in our company	Critical to the long-term viability of our company
Critical to the short-term viability of our company	Will make this location more competitive within company
Will assist in the training of veterans	Will assist in the training of minorities
Will assist in the training of the disabled	Will assist welfare to work participants
Will increase the profitability of our company	Important to the stated mission of our company
Will be an important component of our company's overall workforce employee development efforts	
Will assist in the improvement of international trade opportunities	

Target Populations: At-risk individuals who are receiving public assistance, such as Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Supplemental Security Income (SSI), and/or Social Security Disability Insurance, individuals recovering from substance use disorders and returning citizens who were justice-involved.

Program Narrative: Eligible participants will receive ongoing intensive employment services and support aimed at removing employment barriers, increasing their likelihood of obtaining and maintaining unsubsidized employment, and decreasing their reliance on public assistance benefits. Such services include: enrollment in secondary and/or postsecondary education that leads to an industry-recognized credential of value; dedicated case manager and job coach responsible for coordination with employers, job placement, employment mentoring, and progress monitoring; comprehensive assessment; coordinated referral and service delivery with other agencies for services such as assessments, housing, mental wellness, substance use disorder and domestic violence, when needed; work-based learning opportunities; work readiness activities; job matching and referrals; and transitional support such as childcare, transportation, employment-related supplies.

Funding Source: WIOA Statewide Funds

Number to be served: CareerSource Escarosa = 168 eligible participants served in phlebotomy and medical assistance in conjunction with Baptist Health Care. Baptist Health Care will also be the employer for these participants with an entry wage minimum of \$12.62 per hour. The programs align with vacancy rates and market demands at Baptist Health Care. It is the intention of Baptist Health Care to offer permanent employment for successful graduates at minimum \$13.00 per hour from both programs who meet all certification and background requirements.

Certification by Authorized Company/Institution Representative

The individual signing the below must have authority to enter into contracts on behalf of the applying organization/company.

As an authorized representative of the company/institution listed above, I hereby certify that the information listed above and attached to this document is true and accurate. I am aware that any false information or intended omissions may subject me to civil or criminal penalties for filing of false public records and/or forfeiture of any training award approved through this program.

Typing in your name serves as your electronic signature.

Signature:  <small>DocuSigned by: 7791DA7401A84D2...</small>	Date: 10/20/2022 11:19 AM CDT
Name: Christine Johnson	Title: VP HR

Email Address: christine.johnson@bhcpns.org

EXHIBIT C
Approved Training Narrative and Budget

FY21-22 Get There Faster At-Risk Floridians		
Board Name: CareerSource Escarosa		
Program Costs	Amount	Cost Detail
Baptist Health Care Lab and MA Educator Costs	\$140,000.00	2 staff members - one for each program
Supplies	\$10,000.00	Stethoscopes, scrubs, training kits, medical supplies, gloves, masks, etc.
Total Cost of Lab and MA Staff	\$150,000.00	
Direct Participant Services Costs		
Work Experience Wages	\$663,000.00	Paid to the participants in training (Minimum Hourly Wage per participant is \$12.62 per hour)
Supportive Services	\$15,000.00	
Total Direct Participant Services	\$678,000.00	
Indirect Costs	\$0.00	
Total	\$828,000.00	

CareerSource Escarosa will use the requested budget amount to administer an innovative program that includes intensive case management for at-risk Floridians while earning compensation to complete training leading to an industry recognized certification and employment with Baptist Health Care. Participants will meet with Case Managers to identify career goals and plans for self-sufficiency by use of the program. WIOA Eligible and TANF/SNAP recipients will be targeted for this opportunity.

Program 1 funded by CareerSource Escarosa is a 12-week Phlebotomy Intern program where participants will get paid classroom and "on the job" training experience. Participants will be supervised by the MA Educator who will teach and observe progress throughout the program. Upon successful completion of the program, graduates will be eligible to sit for the certification exam which is paid for by Baptist Health Care. Upon certification, the participant will be eligible to apply for a permanent position.

Program 2 funded by CareerSource Escarosa is a Medical Assistant Intern program that will be offered twice a year for a 6-month period. During this period, participants will get paid classroom and "on the job" training. Upon completion, participants will be able to sit for the certification exam paid for by Baptist Health Care. Once certified, the participant will be eligible for a permanent position.

Approximately 84 students per year for the combined programs (168) individuals will earn compensation while training for certifications and permanent positions with Baptist Health Care.

EXHIBIT D
Certification Regarding Drug-Free Workplace

Pursuant to the Drug-Free Workplace Act of 1988 and its implementing regulations codified at 29 CFR 94, Subpart B. I, the undersigned, in representation of BAPTIST HEALTH CARE, attest and certify that BAPTIST HEALTH CARE will provide a drug-free workplace by the following actions.

- A. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in BAPTIST HEALTH CARE workplace and specifying the actions that will be taken against employees for violation of such prohibition.
- B. Establishing an ongoing drug-free awareness program to inform employees concerning:
 - 1. The dangers of drug abuse in the workplace.
 - 2. The policy of maintaining a drug-free workplace.
 - 3. Any available drug counseling, rehabilitation and employee assistance programs.
 - 4. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
- C. Making it a requirement that each employee to be engaged in the performance of the Contract be given a copy of the statement required by paragraph A.
- D. Notifying the employee in the statement required by paragraph A that, as a condition of employment under the Contract, the employee will:
 - 1. Abide by the terms of the statement.
 - 2. Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five (5) calendar days after such conviction.
- E. Notifying the agency in writing ten (10) calendar days after receiving notice under subparagraph D2. from an employee or otherwise receiving actual notice of such conviction. We will provide such notice of convicted employees, including position title, to every Grant officer on whose Grant activity the convicted employee was working. The notice shall include the identification number(s) of each affected Contract/Grant.
- F. Taking one of the following actions, within thirty (30) calendar days of receiving notice under subparagraph D2, with respect to any employee who is so convicted.
 - 1. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973 as amended.
 - 2. Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local, health, law

enforcement or other appropriate agency.

G. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs A, B, C, D, E, and F.

H. Notwithstanding, it is not required to provide the workplace address under the Contract. As of today, the specific sites are known and we have decided to provide the specific addresses with the understanding that if any of the identified places change during the performance of the Contract, we will inform the agency of the changes. The following are the sites for the performance of work done in connection with the specific Contract including street address, city, county, state and zip code:

Christine Johnson, VP of Human Resources

~~Jennifer Grove, VP of External Relations~~

Baptist Health Care

1717 North E Street

Pensacola, FL 32501

Check () if there are workplaces on file that are not identified here.

Check () if an additional page was required for the listing of the workplaces.

CERTIFICATION

I declare, under penalty of perjury under the laws of the United States and under the penalties set forth by the Drug-Free Workplace Act of 1988, that this certification is true and correct.

Christine Johnson

VP HR

Name and Title of Authorized Representative

BAPTIST HEALTH CARE CORPORATION

Company Name

DocuSigned by:

Christine Johnson

77040A7401A94B2...

Signature

10/20/2022 | 11:19 AM CDT

Date

EXHIBIT E
Nondiscrimination & Equal Opportunity Assurance

As a condition of the Agreement BAPTIST HEALTH CARE assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws:

- (1)The Workforce Innovation and Opportunity Act (WIOA) of 2014 prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA financially assisted program or activity;
- (2)Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C 2000d et seq., which prohibits discrimination on the basis of race, color and national origin;
- (3)Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 794, which prohibits discrimination against qualified individuals with disabilities;
- (4)The Age Discrimination Act of 1975, as amended 42 U.S.C. 6101 et.seq., which prohibits discrimination on the basis of age; and
- (5)Title IX of the Education Amendments of 1972, as amended 20 U.S.C 6181 et seq., which prohibits discrimination on the basis of sex in educational programs.

Christine Johnson

VP HR

Name and Title of Authorized Representative

BAPTIST HEALTH CARE CORPORATION

Company Name

DocuSigned by:

Christine Johnson

10/20/2022 | 11:19 AM CDT

Signature

Date

**CAREERSOURCE ESCAROSA
ACTION ITEM
UPDATE TO CSE'S ELIGIBLE TRAINING PROVIDER LIST (ETPL)**

Date: January 25, 2024

ITEM FOR CONSIDERATION

One of CSE's training providers, Nursing Bridges Institute, has been affected by the emergency ceasing of operations by the Florida Commission for Independent Education (CIE).

CSE's WIOA Eligible Training Provider List (ETPL) includes two programs offered by Nursing Bridges Institute, Nursing (RN) and Practical Nursing (LPN).

Staff is requesting Nursing Bridges Institute be removed from CSE's WIOA ETPL.

RECOMMENDATION:

Approve to remove Nursing Bridges Institute from CSE's WIOA Eligible Training List.

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Search

Site Map ([about_site_map.asp.html](#))



(bonnews/TBONnews.xml)



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FAQs (Scammers_Using_Falsified_Documents.asp.html#)	

Florida Commission for Independent Education Suspends Schools

On February 10, 2023, the Florida Commission for Independent Education approved the emergency ceasing of operations, including graduations, for certain institutions through 3/31/23. The educational institutions are to conduct an internal audit and report back to the Commission Staff by that date. The schools were also instructed to provide additional information to the Commission Staff within seven (7) days of the filing of the orders on these matters.

The Commission licenses private educational institutions in Florida and based these actions on the fact that individuals referenced in the Department of Justice press release on Operation Nightingale were affiliated with these institutions and as a result of Commission Staff visits to the institutions.

The affected schools are:

Carleen Health Institute of South Florida, West Palm Beach (#5075) ([pdfs/5075.pdf](#))

Med-Life Institute, Lauderdale Lakes (#3097) ([pdfs/3097.pdf](#))

Myrielle School of Nursing, Palm Springs (#7741) ([pdfs/7741.pdf](#))

Nursing Bridges Institute, Pensacola (#6138) ([pdfs/6138.pdf](#))

Palm Beach International College, Lake Worth (#7659) ([pdfs/7659.pdf](#))

Suncoast College of Health, Bradenton (#3214) ([pdfs/3214.pdf](#))

Techni-Pro Institute, LLC., Boca Raton (#2671) ([pdfs/2671.pdf](#))

The Commission may consider emergency action in accordance with section 120.60(6), Florida Statutes, and disciplinary measures in accordance with section 1005.38, Florida Statutes and Rule 6E-2.0061, Florida Administrative Code.

The following link to the Commission's website will have additional information when available.

<https://www.fldoe.org/policy/cie/> (<https://gcc02.safelinks.protection.outlook.com/?>

url=https%3A%2F%2Fwww.fldoe.org%2Fpolicy%2Fcie%2F&data=05%7C01%7CJoe.Baker%40flhealth.gov%7C9d87eb735f4b47367bd008db0ba13b22%7C28cd8f803c444b2781a0cd;

**CAREERSOURCE ESCAROSA
APPLICATION FOR CSE'S ELIGIBLE TRAINING PROVIDER LIST
ACTION ITEM**

Date: January 25, 2024

Item For Consideration:

CSE received an application from a training provider requesting to be placed on CSE's Eligible Training Provider List:

- **Innovak of Florida, Inc. dba My IT Future Institute (formerly New Horizons Computer Learning Center)**
1221 Lee Road
Orlando, FL 32810

The applications for the training provider is complete and required documents have been received.

DISCUSSION/RECOMMENDATION:

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Give Form to the
requester. Do not
send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Innovak of Florida, Inc	
2 Business name/disregarded entity name, if different from above My IT Future Institute	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ►	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 1221 Lee Road	Requester's name and address (optional)
6 City, state, and ZIP code Orlando, FL 32810	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number										
			-				-			
or										
Employer identification number										
5	7		-	0	9	9	2	1	3	4

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► <i>Patricia Sprague</i>	Date ► 12/03/2023
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

2/13/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION** IS **WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER A Marsh & McLennan Agency LLC 870 S Pleasantburg Dr Greenville SC 29607	CONTACT NAME: Jeri Whitaker PHONE (A/C, No, Ext): 864-255-4532 E-MAIL ADDRESS: jeri.whitaker@MarshMMA.com FAX (A/C, No): 864-233-9291
INSURED Innovak of Florida, Inc 1221 Lee Road Orlando FL 32810	INSURER(S) AFFORDING COVERAGE INSURER A: Travelers Prop & Casualty Co of America INSURER B: Phoenix Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:
	NAIC # 25674 25623

COVERAGES**CERTIFICATE NUMBER:** 325170189**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	Y		ZLP31M63704	8/1/2022	8/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP8K37853A	8/1/2022	8/1/2023	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A	UB4H314700	8/1/2022	8/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**CareerSource Escarosa
6913 N 9th Ave
Pensacola FL 32504

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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New Horizons Computer Learning Center - Orlando, FL // 407-210-4200

Microsoft Certified Azure Administrator Associate

Total Program Tuition Cost \$2,975.00

There are no other incidental costs to this program

Cyber Security IT Professional

Total Program Tuition Cost \$12,995.00

There are no other incidental costs to this program

Cyber Security Analyst (CEH; CySA+; Security+)

Total Program Tuition Cost \$7,500.00

There are no other incidental costs to this program

Certified Information Systems Security Professional (CISSP)

Total Program Tuition Cost \$3,920.00

There are no other incidental costs to this program

Network Security Technician (A+; Net+; Sec+)

Total Program Tuition Cost \$7,500.00

There are no other incidental costs to this program

CompTIA A+ / Network+

Total Program Tuition Cost \$6,500.00

There are no other incidental costs to this program

Preparatory Program for Cisco Certified Network Associate (CCNA)

Total Program Tuition Cost \$5,990.00

There are no other incidental costs to this program

Preparatory Program for Project Management Professional

Total Program Tuition Cost \$5,387.00

There are no other incidental costs to this program

FRONT END DEVELOPER

Total Program Tuition Cost \$8,000.00

There are no other incidental costs to this program

BACK END DEVELOPER

Total Program Tuition Cost \$8,000.00

There are no other incidental costs to this program

PY 2022-2023 WIOA TRAINING PROGRAMS ELIGIBLE		Revised 05/18/2023	Program
Title	Credential	Training Institution	
Accounting Technology	AS	Pensacola State College	
Advanced Welding Technology	Certificate	Pensacola State College	
Agile Certified Professional	Certificate	Applied Technology Academy	
Applied Cybersecurity	Certificate	Locklin Technical College	
Architectural Design & Construction Technology	AS	Pensacola State College	
ATP (Part 61) Piper Seminole	Certificate	Sky Warrior	
ATP/CTP (Part 61)	Certificate	Sky Warrior	
Automotive Collision Technology Technician	Certificate	George Stone Technical College	
Automotive Service Technology	Certificate	George Stone Technical College	
Automotive Service Technology 1	Certificate	Locklin Technical College	
Automotive Service Technology 2	Certificate	Locklin Technical College	
Aviation Airframe & Powerplant Mechanics	Certificate	George Stone Technical College	
AWS Certified Cloud Provider	Certificate	Applied Technology Academy	
AWS Certified Solutions Architect Associate	Certificate	Applied Technology Academy	
AWS Certified Developer Associate	Certificate	Applied Technology Academy	
AWS Certified SysOps Administrator Associate	Certificate	Applied Technology Academy	
Back End Developer	Certificate	New Horizons Computer Learning Center	
Business Administration	AS	Pensacola State College	
Career Airline Pilot MEI Package (Full Course)	Certificate	Sky Warrior	
Certified Information Security Manager - CISM	Certificate	Applied Technology Academy	
Certified Information Systems Security Professional (CISSP)	Certificate	Applied Technology Academy	
Certified Scrum Master - CSM	Certificate	Applied Technology Academy	
CFI (Part 61) Cessna 172	Certificate	Sky Warrior	
CFII (Part 61) Cessna 172	Certificate	Sky Warrior	
CISCO Certified Network Administrator	Certificate	Applied Technology Academy	
CISCO Certified Network Professional	Certificate	Applied Technology Academy	
CNC Machinist / Fabricator	Certificate	Pensacola State College	
Combined Firefighter - EMT	Certificate	George Stone Technical College	
Commercial Drivers License Preparation Program	Certificate	Truck Driver Institute	
Commercial Drivers License Training Course	Certificate	CDL of AL	
Commercial Vehicle Driving	Certificate	Pensacola State College	
Commerical Foods and Culinary Arts	Certificate	Locklin Technical College	
Commercial Pilot (Part 141)	Certificate	Sky Warrior	
CompTIA A+	Certificate	University of West Florida	
CompTIA A+	Certificate	Applied Technology Academy	
CompTIA A+/Network+	Certificate	New Horizons Computer Learning Center	
CompTIA Network+	Certificate	Applied Technology Academy	
CompTIA Security+	Certificate	Applied Technology Academy	
CompTIA Security+ CE	Certificate	Applied Technology Academy	
CompTIA CASP+	Certificate	Applied Technology Academy	
CompTIA CySA+	Certificate	Applied Technology Academy	
CompTIA Pen Test+	Certificate	Applied Technology Academy	
CompTIA Cloud+	Certificate	Applied Technology Academy	
CompTIA Project+	Certificate	Applied Technology Academy	

PY 2022-2023 WIOA TRAINING PROGRAMS ELIGIBLE		Revised 05/18/2023	Program
Title	Credential	Training Institution	
CompTIA Linux+	Certificate	Applied Technology Academy	
Computer Information Technology	AS	Pensacola State College	
Computer Programming & Analysis	AS	Pensacola State College	
Computer Systems & Information Technology	Certificate	George Stone Technical College	
Computer Systems & Information Technology	Certificate	Locklin Technical College	
Correctional Officer	Certificate	George Stone Technical College	
Culinary Arts	Certificate	Pensacola State College	
Culinary Management	AS	Pensacola State College	
Cyber Forensics	AS	Pensacola State College	
Cybersecurity, Applied	Certificate	George Stone Technical College	
Cybersecurity	AS	Pensacola State College	
Cyber Security Analyst (CEH; CySA+; Security+)	Certificate	New Horizons Computer Learning Center	
Cyber Security IT Professional	Certificate	New Horizons Computer Learning Center	
Dental Assistant	Diploma	Fortis Institute	
Dental Hygiene	AS	Pensacola State College	
Early Childhood Education	AS	Pensacola State College	
EC-Council Certified Network Defender	Certificate	Applied Technology Academy	
EC-Council Certified Ethical Hacker	Certificate	Applied Technology Academy	
Electricity	Certificate	George Stone Technical College	
Electricity	Certificate	Locklin Technical College	
Electricity	Certificate	Pensacola State College	
Electrocardiograph Technician	Certificate	Pensacola State College	
Electronics Engineering Technology	AS	Pensacola State College	
Engineering Support Specialist	Certificate	Pensacola State College	
Food and Beverage Management	Certificate	Pensacola State College	
Front End Developer	Certificate	New Horizons Computer Learning Center	
GIAC Security Essentials	Certificate	Applied Technology Academy	
GIAC Certified Incident Handler	Certificate	Applied Technology Academy	
Graphic Design	AS	Pensacola State College	
Health Information Technology	AS	Pensacola State College	
Health Services Management	AS	Pensacola State College	
Heating and Air Conditioning	AAS	Coastal Alabama Community College	
Heating, Ventilation, Air Conditioning, and Refrigeration	Diploma	Fortis Institute	
Heating, Ventilation, Air Conditioning/Refrigeration	Certificate	George Stone Technical College	
Heating, Ventilation, Air Conditioning/Refrigeration (HVAC/R) 1	Certificate	Locklin Technical College	
Heating, Ventilation, Air Conditioning/Refrigeration (HVAC/R) 2	Certificate	Locklin Technical College	
Heating, Ventilation & Air Conditioning	Certificate	Pensacola State College	
Hospitality & Tourism Management	AS	Pensacola State College	
Human Resources Administrator	Certificate	Pensacola State College	
Instrument Rating (Part 141) Cessna 172	Certificate	Sky Warrior	
Introduction to Python	Certificate	Applied Technology Academy	
ISC2 Certified Information Systems Security Professional - CISSP	Certificate	Applied Technology Academy	
ISC2 Certified Security Software Lifecycle Professional - CSSLP	Certificate	Applied Technology Academy	
ISC2 Certified Cloud Security Professional - CCSP	Certificate	Applied Technology Academy	

PY 2022-2023 WIOA TRAINING PROGRAMS ELIGIBLE		Revised 05/18/2023	Program
Title	Credential	Training Institution	
Law Enforcement Officer	Certificate	George Stone Technical College	
Mechanical Design & Fabrication	AS	Pensacola State College	
Medical Administrative Specialist	Certificate	George Stone Technical College	
Medical Administrative Specialist	Certificate	Locklin Technical College	
Medical Assistant	Certificate	Fortis Institute	
Medical Assistant Certified Clinical (CCMA)	Certificate	University of West Florida	
Medical Assisting	Certificate	Pensacola State College	
Medical Coding and Billing (CBCS)	Certificate	University of West Florida	
MEI (Part 61) Piper Seminole	Certificate	Sky Warrior	
Microsoft Automating Administration w/Windows PowerShell (M10961)	Certificate	Applied Technology Academy	
Microsoft Azure Administrator	Certificate	Applied Technology Academy	
Microsoft Certified Azure Administrator Associate	Certificate	New Horizons Computer Learning Center	
Microsoft Certified Desktop Administrator	Certificate	Applied Technology Academy	
Multi-Engine (Part 141) Piper Seminole	Certificate	Sky Warrior	
Network Security Technician (A+; Net+; Sec+)	Certificate	New Horizons Computer Learning Center	
Network Support Services	Certificate	George Stone Technical College	
Network Systems Administration	Certificate	George Stone Technical College	
Nursing (BSN)	BSN	University of West Florida	
Nursing (RN)	AAS	Coastal Alabama Community College	
Nursing (RN)	AS	Pensacola State College	
Nursing (RN)	AS	Fortis Institute	
Nursing (RN)	AS	Nursing Bridges Institute	
Nursing Assistant (Certified)	Certificate	University of West Florida	
Offensive Security Certified Professional - OSCP	Certificate	Applied Technology Academy	
Paralegal (Legal Assisting)	AS	Pensacola State College	
Patient Care Technician	Certificate	Pensacola State College	
Phlebotomy Technicain	Certificate	Pensacola State College	
Physical Therapist Assistant	AS	Pensacola State College	
Plumbing Technology	Certificate	Pensacola State College	
Practical Nursing (LPN)	Certificate	Coastal Alabama Community College	
Practical Nursing (LPN)	Certificate	Fortis Institute	
Practical Nursing (LPN)	Certificate	Locklin Technical College	
Practical Nursing (LPN)	Certificate	Pensacola State College	
Practical Nursing (LPN)	Certificate	Reid State Technical College	
Practical Nursing (LPN)	Certificate	Nursing Bridges Institute	
Preparatory Program for Cisco Certified Network Associate (CCNA)	Certificate	New Horizons Computer Learning Center	
Preparatory Program for Project Management Professional	Certificate	New Horizons Computer Learning Center	
Private Pilot (Part 141) Cessna 172	Certificate	Sky Warrior	
Professional Culinary Arts & Hospitality	Certificate	George Stone Technical College	
Project Management Certified Associate - CAPM	Certificate	Applied Technology Academy	
Project Management Professional - PMP	Certificate	Applied Technology Academy	
Project Management Professional - PMP	Certificate	University of West Florida	
Radiography	AS	Pensacola State College	
Security Officer Training	Certificate	Security Services Training Institute	

PY 2022-2023 WIOA TRAINING PROGRAMS ELIGIBLE		Revised 05/18/2023	Program
Title	Credential	Training Institution	
Six Sigma Green Belt	Certificate	Applied Technology Academy	
Six Sigma Black Belt	Certificate	Applied Technology Academy	
Sonography (Diagnostic Medical Sonography)	AS	Pensacola State College	
Surgical Technology	Certificate	Pensacola State College	
Uptown Preapprenticeship for Technology and Innovation	Certificate	LT3 Academy (Net Synergy)	
Vmware Certified Associate - VCA	Certificate	Applied Technology Academy	
Vmware Certified Professional - VCP	Certificate	Applied Technology Academy	
Welding Technology	AAS	Coastal Alabama Community College	
Welding Technology	Certificate	George Stone Technical College	
Welding Technology	Certificate	Locklin Technical College	
Welding Technology	Certificate	Pensacola State College	
Welding Technology - Advanced	Certificate	Locklin Technical College	
Welding Technology, Advanced	Certificate	George Stone Technical College	

**CAREERSOURCE ESCAROSA
ACTION ITEM
ADMINISTRATIVE PLAN**

DATE: January 25, 2024

ITEM FOR CONSIDERATION:

CareerSource Escarosa (CSE) has been operating by its current administrative plan, which was revised in 2020, but not approved by the board.

An Administrative Plan Review Committee was identified to review the plan. The committee reviewed the plan, with recommendations outlined, as attached.

RECOMMENDATION: The Board approve the recommended changes/revisions to CSE's Administrative Plan, as presented by the Administrative Plan Review Committee.

CAREERSOURCE ESCAROSA ADMINISTRATIVE PLAN EFFECTIVE JANUARY 25, 2024

Updated: 01.25.2024

TABLE OF CONTENTS

Section II. Financial Management

Travel – Executive Director

Executive Director replaced with Chief Executive Officer

Cash Disbursements

Added: *Global Cash Card*

Personnel and Payroll

Added: Employee Compensation, Incentive and Merit/COLAs

Added: Schedule of Operations/Holidays

Added: Benefits:

Insurance Waiver Benefits – Section XIV., Board Adopted Policies

Added:

Section XIV. Board Adopted Policies

Administrative Policy – Identification of Regional Planning Areas

Adopted by CSE Board of Directors – November 3, 2024

Strategic Policy – Education and Industry Consortiums

Adopted by CSE Board of Directors – November 3, 2024

Strategic Policy – Regional Planning Areas Strategic Policy

Adopted by CSE Board of Directors – November 3, 2024

Administrative Policy – 090 – Eligible Training Providers List Requirements

Adopted by CSE Board of Directors – November 3, 2024

Administrative Policy – 095 – Youth Program Eligibility/Waiver for Workforce Innovation
& Opportunity Act Out-of-School Youth Expenditures
(Update in process by Florida Commerce)

Adopted by CSE Board of Directors – July 20, 2023

Administrative Policy – 115 – Common Exit

Adopted by CSE Board of Directors – March 18, 2022

CSE Local Operating Procedures – Insurance Waiver Benefits (Draft)

SECTION I. INTRODUCTION

CareerSource Escarosa (Escarosa)
Replaced with CSE in all instances.

Unemployment Compensation Information Services
Replaced w/Reemployment Assistance Program

DEO is replaced with Florida Commerce in all instances.

SECTION II. FINANCIAL MANAGEMENT

INTRODUCTION

CFR Part 200
Replaced with 2 CFR Part 200

I. TRAVEL POLICIES

1. PURPOSE:

F.S.
Florida Statutes (F.S.) in all instances

II. AUTHORITY

Florida Statutes
Replaced with an abbreviation - F.S.

III. DEFINITIONS

A. Authorized person or authorized traveler: Board employee, board member, or other persons traveling on Board business who are authorized to incur travel expenses in performance or Board duties. This expressly includes consultants and advisers, per Section 112.061(2)(e)2, F.S.

Added:

The travel day for Class A travel shall be calendar day (midnight to midnight). The travel day for Class B travel shall begin at the same time as the travel period. For Class A and Class B travel, the traveler shall be reimbursed one-fourth of the authorized rate of per diem for each quarter, or fraction thereof, of the travel day included within the travel period. Class A and Class B travel shall include any assignment on official business outside of regular office hours and away from regular places of employment when it is considered reasonable and necessary to stay overnight and for which travel expenses are approved.

- a) *The travel day for Class A travel shall be calendar day (midnight to midnight). The travel day for Class B travel shall begin at the same time as the travel period. For Class A and Class B travel, the traveler shall be reimbursed one-fourth of the authorized rate of per diem for each quarter, or fraction thereof, of the travel day included within the travel period. Class A and Class B travel shall include any assignment on official business outside of regular office hours and away from regular places of employment when it is considered reasonable and necessary to stay overnight and for which travel expenses are approved.*
- b) *A traveler shall not be reimbursed on a per diem basis for Class C travel, but shall receive subsistence as provided in this section, which allowance for meals shall be based on the following schedule:*
 1. *Breakfast – When travel begins before 6 a.m. and extends beyond 8 a.m.*
 2. *Lunch – When travel begins before 12 noon and extends beyond 2 p.m.*
 3. *Dinner – When travel begins before 6 p.m. and extends beyond 8 p.m. or when travel occurs during nighttime hours due to special assignment.*

- D. Class C Travel: Travel for short or day trips where the traveler is not away from his or her official headquarters overnight.

NOTE: CLASS “C” TRAVEL PER DIEM OR SUBSISTENCE ALLOWANCES ARE CURRENTLY NOT TO BE REIMBURSED TO TRAVELERS. {Source: Section 112.061(15), F.S.}

Replaced with: NOTE: Class C Travel subsistence allowances are reimbursed. No per diem allowances are reimbursed to Class C travelers or reimbursed if traveler is in the city or town of the official headquarters or immediate vicinity. {Source: Section 112.061 (15), F.S.}

- E. Complimentary/Gratuitous Transportation:

RWD

Replaced with Local Workforce Development Board (LWDB)

IV. AUTHORITY TO INCUR TRAVEL EXPENSES:

- B. Refer to the June, 2010, Board of Directors, to confirm who is authorized to approve travel.

Refer to the September, 2022, Board of Directors Meeting Minutes, to confirm who is authorized.

V. TRANSPORTATION

- D. Board/personal vehicles

12. An employee may claim mileage from his home to a work location outside his official headquarters provided that travel begins more than one hour before or one hour after the traveler’s regular work hours and provided the miles claimed do not exceed the miles actually driven. {Source: 69I-42.008(4), F.A.C.}

An employee may claim mileage from his home to a work location outside his official headquarters provided travel begins more than one hour before or one hour after the traveler’s regular work hours and provided the miles claimed do not exceed the miles driven. {Source: 69I-42.008(4), F.A.C.}

VII. LODGING EXPENSES:

- D. Hotel expenses over \$150 per night may require additional justification. {Not required by Statute or Rule. Recommended Best Practice.}

Hotel expenses over \$175.00 per night may require additional justification. ({Not required Statute or Rule. Recommended Best Practices.}

VIII. REIMBURSABLE INCIDENTAL EXPENSES: A.

All taxi fares/Uber require a receipt.

All taxi fares/Uber, Lyft, or other rideshare companies require a receipt.

IX. CONFERENCE / CONVENTION TRAVEL:

5. Payment in advance of earlier than twenty workdays before the travel period should be accompanied by written justification, such as discounts for earlier payment or earlier payment required for reservation. {Source: 69I-42.004(4), F.A.C.}

Replace with Payment in advance of earlier than seven workdays before the travel period should be accompanied by written justification, such as discounts for earlier payment or earlier payment required for reservation. {Source: 69I-42.004(4), F.A.C.}

XI. REIMBURSEMENT OF TRAVEL EXPENSITURES BY INDIVIDUALS WITH DISABILITIES:

REIMBURSEMENT OF TRAVEL EXPENDITURES BY INDIVIDUAL WITH DISABILITIES

- B. When a physically handicapped traveler incurs travel expenses in excess of those ordinarily authorized pursuant to Section 112.061, F.S., and such excess travel expenses were incurred to permit the safe travel of that handicapped traveler, those excess expenses will be reimbursed by the Board to the extent that the expenses were reasonable and necessary to the safe travel of the individual. All such claims for reimbursement of excess travel expenses shall be submitted in accordance with the requirements of the Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq. {Source: 691-42.012, F.A.C.}

When a physically handicapped traveler incurs travel expenses more than those ordinarily authorized pursuant to Section 112.061, F.S., and such excess travel expenses were incurred to permit the safe travel of that handicapped traveler, those excess expenses will be reimbursed by the Board to the extent that the expenses were reasonable and necessary to the safe travel of the individual. All such claims for reimbursement of excess travel expenses shall be submitted in accordance with the requirements of the Americans with Disabilities Act of 1990, 42 U.S.C. 12101 et seq. {Source: 691-42.012, F.A.C.}

TRAVEL – EXECUTIVE DIRECTOR

TRAVEL – CHIEF EXECUTIVE OFFICER

Due to the recent actions by the State in requiring all travel of local area workforce boards to comply with State Travel requirements, the Executive Director is requesting Board approval of his/her involvement in the following:

Executive Director replaced with Chief Executive Officer.

Organizations and events related to improving business recognition, economic development, outreach and recruitment to the business community:

- EDGE - Locklin Vocational Center
Locklin Technical College
- Gulf Power Economic Symposium
Florida Power and Light Economic Symposium

Added: *George Stone Technical College*

Opening Doors, Homeless Reduction Task Force of Northwest Florida, First Place Partners, Florida Workforce Development Association, Early Learning Coalitions (Santa Rosa and Escambia Counties), Disadvantaged Transportation Board (Santa Rosa and Escambia Counties)

Organizations related to increasing services/referrals for the residents Escarosa serves through our various programs:

Escarosa replaced with CSE.

- Poverty Solution Team – United Way led effort to assist with employment opportunities
United Way of West Florida, Diversity, Equity, and Inclusion Development Board

Day-to-Day Work related Activities:

Executive Director replaced with Chief Executive Officer in all instances.

CREDIT CARDS

Executive Director replaced with Chief Executive Officer in all instances.

Escarosa replaced with CSE in all instances.

Escarosa does not provide for entertainment or alcoholic beverages in conjunction with expenditures on this card.

CSE does not provide entertainment or alcoholic beverages in conjunction with expenditures on this card.

BUDGETARY PROCESS

Approval Process

The Chief Financial Officer shall annually submit a detailed budget to the Executive Committee and Board of Directors for review and approval. The proposed budget will include a breakdown by appropriate program cost categories. The Executive Committee will consider, approve, and recommend the proposed budget to the full Board of Directors for review and adoption. Modifications to the budget will be submitted to the Executive Committee and Board of Directors when required due to funding changes and unexpected changes in the programs with the exception of temporary programs that require a budget submitted to DEO along with the request for funds (time requirements would not allow prior Board approval). The budget submitted to DEO will be entered in the Accounting System for comparison to actual expenditures.

The Chief Financial Officer shall annually submit a detailed budget to the Chief Executive Officer for review and approval. The proposed budget will include a breakdown by appropriate program cost categories. The CEO will present the final recommended budget to the Executive Committee for consideration and approval. The recommended proposed budget will then be presented to the full Board of Directors for review and adoption. Modifications to the budget will be submitted to the Executive Committee and Board of Directors when required due to funding changes and unexpected changes in the programs except for temporary programs that require a budget submitted to Florida Commerce along with the request for funds (time requirements would not allow prior Board approval). The budget submitted to Florida Commerce will be entered in the Accounting System for comparison to actual expenditures.

Oversight

1. Detailed financial statements will be prepared on a monthly basis for analysis by the Executive Director and Chief Financial Officer.

Detailed financial statements will be prepared monthly for analysis by the Chief Executive Officer and Chief Financial Officer.

Escarosa is replaced with CSE in all instances.

CASH MANAGEMENT AND REPORTING – FEDERAL FUNDS

It is the policy of Escarosa to utilize advance funds, as allowed under federal law, for the operation of its all programs administered by the Department of Economic Opportunity (DEO), i.e. Workforce Innovation and Opportunity Act (WIOA), Welfare Transition Program (WTP), Wagner Peyser, Unemployment Compensation, Supplemental Nutrition Assistance Program (SNAP) and Veterans Programs. Cash advances will be limited to the minimum amounts needed and shall be timed in accordance with the actual, immediate cash requirements. Program income, rebates, refunds, contract settlements, audit recoveries, and interest earned shall be disbursed prior to requesting additional cash advances.

Escarosa is replaced with CSE.

Cash advances are requested through the State of Florida's One-Stop Management Information System (OSMIS) for all funds that flow through the Department of Economic Opportunity (DEO). Advances are requested weekly (by Wednesday or the designated day in holiday weeks) for electronic transfer into Escarosa's bank account by the following Wednesday or Thursday.

Cash advances are requested through the State of Florida's Subrecipient Enterprise Resource Application (SERA) for all funds that flow through the Florida Commerce. Advances are requested weekly (by

Wednesday or the designated day in holiday weeks) for electronic transfer into CSE's bank account by the following Tuesday.

Each program's funds will be accounted for separately on a weekly basis in order to monitor cash balances and project the cash advances required for the following week's disbursements.

Each program's funds will be accounted for separately on a weekly basis in order to monitor cash balances and project the cash advances required for the following week's disbursements

Projection of the cash advances required will be based on actual invoices due and estimates of participant support services expenditures to be disbursed the day after the receipt of the cash warrant. The Accounting Specialists and the Chief Financial Officer will participate in the cash request process with the Chief Financial Officer making the final determination of the exact amount to order from each fund. The Chief Financial Officer or an Accounting Specialist (in the absence of the CFO) will enter the requests in OSMIS.

Projection of the cash advances required will be based on actual invoices due and estimates of participant support services expenditures to be disbursed the day after the receipt of the cash warrant. The Accounting Manager and the Chief Financial Officer will participate in the cash request process with the Chief Financial Officer making the final determination of the exact amount to order from each fund. The Chief Financial Officer or Accounting Manager (in the absence of the CFO) will enter the request in SERA.

Interest earned will be used as program income for WIOA programs, which include WIOA Adult, Dislocated Worker, Youth and Veterans' Programs.

Interest earned exceeding allotted amount per 2CFR 200.305(9) will be used as program income for WIOA programs, which include WIOA Adult, Dislocated Worker, Youth and Veterans' Programs.

Transfer of funds between CSE accounts are subject to CEO approval.

Escarosa will report results of financial operations monthly to DEO via the OSMIS system by the 20th day following the month end. Expenditures for the reports will come from the accounting system. Expenditures will be reported to each Notice of Funds Available (NFA) in which expenditures were incurred. Expenditures will be applied to program income prior to applying to federal funds. Monthly reconciliations of the general ledger to OSMIS will be prepared by the Chief Financial Officer and maintained in a file for audit and monitoring review.

Escarosa replaced with CSE

DEO replaced with Florida Commerce

OSMIS replaced with SERA

BANK RECONCILIATION

1. The bank statement will be received by the Executive Director and reviewed prior to submitting to the accounting department for preparation of the bank reconciliation. The bank statement packet will be initialed and dated by the Executive Director signifying review.

Executive Director replaced with CEO in all instances.

2. The Bank account is reconciled with accounting records in a timely manner by the Accounting Specialist. The Chief Financial Officer reviews and approves the bank reconciliation.

Accounting Specialist replaced with Accounting Manager.

CASH RECEIPTS

Once the cash request has been entered in OSMIS and approved by DEO, the Chief Financial Officer

will print an OSMIS report showing the cash by NFA to be received from the state. A copy of the report will be given to the Accounting Specialist and a copy is maintained for the cash receipts journal entry. All program funds are received by means of electronic bank transfer into the Escarosa bank account. The Accounting Specialist ascertains that the transfer has occurred and enters deposits in the Cash Receipts Log and prepares the Cash Receipt Memo/Journal Entry. The Chief Financial Officer verifies that the appropriate program is credited by signing the Cash Receipt Memo/Journal Entry. The cash receipt journal entry is entered into the accounting system by the Chief Financial Officer.

Once the cash request has been entered in SERA and approved by Florida Commerce, the Chief Financial Officer will print a SERA report showing the cash by NFA to be received from the state. A copy of the report will be given to the Senior Accountant and a copy is maintained for the cash receipts journal entry. All program funds are received by means of electronic bank transfer into the CSE bank account. The Accounting Manager ascertains that the transfer has occurred and enters deposits in the Cash Receipts Log and Senior Accountant prepares the Cash Receipt Memo/Journal Entry. The Chief Financial Officer verifies that the appropriate program is credited by signing the Cash Receipt Memo/Journal Entry. The cash receipt journal entry is entered into the accounting system by the Senior Accountant and then reviewed and posted by the Accounting Manager.

Other non-federal cash receipts are received through the mail. The Executive Secretary (or Chief Financial Officer if Executive Secretary is unavailable) receives the unopened mail each day. The Executive Secretary prepares a log of any checks received and then distributes to Accounting. The Accounting Specialist prepares the Cash Receipt Memo/Journal Entry and attaches all documents associated with the remittance. It is reviewed and approved by the Chief Financial officer and the bank deposit is made by the Accounting Specialist.

Other non-federal cash receipts are received through the mail. The Executive Secretary (or Chief Financial Officer if Executive Secretary is unavailable) receives the unopened mail each day. The Executive Secretary prepares a log of any checks received then distributes the checks to Accounting after stamping each check with Deposit Only with CSE's bank account number. The Accounting Clerk prepares the Cash Receipt Memo/Journal Entry and attaches all documents associated with the remittance. It is reviewed and approved by the Chief Financial officer and the bank deposit is made by the Accounting Clerk.

CASH DISBURSEMENTS

Escarosa has two types of cash disbursements:

CSE has 3 types of cash disbursements:

Accounts Payable Disbursements

Petty Cash Disbursements

Added: Global Cash Card Disbursements

Accounts Payable Disbursement

All invoices received through the mail are accumulated by the Accounting Specialist. Invoices for purchased goods or services are matched with purchase orders, receiving reports, shipping reports and/or any other authorizations required. The Accounting Specialist prepares the check requests (Check Request Form) for these invoices as well as invoices for recurring monthly expenses and lease and rental agreements. General ledger accounts to be charged are determined by the authorization document or the Chief Financial Officer.

All invoices received through the mail and through email are accumulated by the Accounting Clerk. Invoices for purchased goods or services are matched with purchase orders, receiving reports, shipping reports and/or any other authorizations required. The Accounting Clerk prepares the check requests (Check Request Form) for these invoices as well as invoices for recurring monthly

expenses and lease and rental agreements. General ledger accounts to be charged are determined by the authorization document or the Chief Financial Officer.

Invoices for Service Provider Contracts are audited for compliance with the contractual agreement by the Accounting Specialist and the check request is prepared. The audited invoice is forwarded to the Chief Financial Officer for approval.

Invoices for Service Provider Contracts are audited for compliance with the contractual agreement by the Accounting Manager or Senior Accountant and the check request is prepared. The audited invoice is forwarded to the Chief Financial Officer for approval.

Participant support services and training payments are initiated by the Service Provider Case Managers. A check request that designates the program to be charged and includes authorization documents is prepared by Support Services personnel and forwarded to the Accounting Specialists for review.

Participant support services and training payments are initiated by the Service Provider Case Managers. A check request that designates the program to be charged and includes authorization documents is prepared by Support Services personnel and forwarded to the Service Provider Case Manager to approve and sign. Once approved and signed by Service Provider Case Manager, the Accounting Manager reviews the check request.

The Accounting Specialist processes all approved check requests in the accounting system and prepares computerized checks. Checks are attached to the check requests and backup documentation. The checks are then submitted to the Executive Director or Chief Operations Officer (if Executive Director is not available) or the Program Manager – WTP/SNAP (if Chief Operations Officer is not available) for signature. All checks for \$20,000 or over require a second signature by an authorized Escarosa Board member.

The Senior Accountant processes all approved check requests in the accounting system and prepares computerized checks. Checks are attached to the check requests and backup documentation by the Accounting Clerk. The checks are then submitted to the Chief Executive Officer or Chief Operations Officer (if Chief Executive Officer is not available). All checks for \$20,000 or over require a second signature by an authorized CSE Board member.

Signed checks are returned to the Accounting Specialist for mailing or other distribution. Check copies are attached to supporting documentation and each page of the supporting documentation is stamped "PAID". Checks that are not mailed directly to the recipient must be signed for when distributed.

Signed checks are returned to the Accounting Clerk for mailing or other distribution. Check copies are attached to supporting documentation and each page of the supporting documentation is stamped "PAID". Checks that are not mailed directly to the recipient must be signed for when distributed.

Blank checks are secured in a locked fireproof cabinet with access limited to the Chief Financial Officer and Accounting Specialists.

Blank checks are secured in a locked fireproof cabinet with limited access to the Senior Accountant and Accounting Clerk. The Chief Financial Officer and Accounting Manager (when CFO is not present) is responsible for securing blank checks.

Petty Cash Fund

The Board of Directors has authorized a petty cash fund in the amount of \$100. The fund is maintained by the Accounting Specialist. Petty cash will be distributed upon receipt of an approved petty cash request form with attached receipts for the expenditures. The Accounting Specialist reconciles the petty cash fund and the reconciliation is approved by the Chief Financial Officer before the fund will be reimbursed. The petty cash fund will be reimbursed through an accounts payable request that will include the approved reconciliation and all petty cash request forms.

The Board of Directors has authorized a petty cash fund in the amount of \$100. The fund is maintained by the Accounting Clerk. Petty cash will be distributed upon receipt of an approved petty cash request form with attached receipts for the expenditures. The Accounting Clerk reconciles the petty cash fund and the reconciliation is approved by the Chief Financial Officer before the fund will be reimbursed. The petty cash fund will be reimbursed through an accounts payable request that will include the approved reconciliation and all petty cash request forms.

Added:

Global Cash Cards

The Career Advisors and Case Managers prepare a list of participants that are eligible to receive needs based payments for transportation and other support services. The list includes the amount to be distributed and for purpose. The list is approved by the Program Managers. If there are new participants, the Career Advisors and Case Managers will order a cash card through the Global Cash Card system. The approved list is sent to the Accounting Department for coding and processing. The Senior Accountant will upload the information into the template provided by Global Cash Card. The cash is transferred to Global Cash Card from CSE Operating Account by the Chief Financial Officer or Accounting Manager in the absence of the CFO. The funds are loaded on the cards by the Senior Accountant through the Global Cash Card system. All documentation related to the transactions are reconciled at the end of the month by the Senior Accountant.

PERSONNEL AND PAYROLL

Employee Leasing

The Escarosa Board of Directors has entered into an employee leasing agreement with Landrum Professional, Inc. (Landrum). This agreement creates a dual employment relationship between CareerSource Escarosa and Landrum. Landrum provides a multitude of services, which includes payroll administration, human resources management, compliance reporting, and employee benefits administration. Escarosa retains hiring, firing, supervision, evaluation, promotion, salary determination, and employee benefits determinations.

Escarosa is replaced with CSE in all instances.

Employee Records

The Accounting Specialist maintains a set of employee records for the Escarosa staff. The files are kept in a secure area with limited access. Landrum maintains the official personnel files on employees, which will include all legally required documentation, i.e. I-9's, W-4's, and employee benefits documentation. *The Accounting Manager maintains a set of employee records for the CSE staff online/electronically. Landrum maintains the official personnel files on employees, which will include all legally required documentation, i.e. I-9's, W-4's, and employee benefits documentation. .*

Escarosa's files contain:

CSE's online/electronic files contain:

Salary Administration

Each personnel file contains an "Employment Data" and "Payroll Change Notice" for each pay increase, promotion, demotion or other change in employment circumstance. This completed form include the change and the Executive Director's approval signature. The Accounting Specialist forwards a copy to Landrum for action and filing.

Executive Director is replaced with Chief Executive Officer.

Accounting Specialist is replaced with Accounting Manager.

New positions created by Escarosa must be approved by the Board of Directors. The Board will approve the position title, job description and salary range.

Escarosa is replaced with CSE.

Added:

Employee Compensation, Incentives, and Merit/COLAs

Merit incentives are subject to approval by the CEO and funding availability as determined by the Board's budget. When approved, the incentive will take place on the universal evaluation anniversary date of July 1st or the agreed upon date established by the Board of Directors.

1. Merit Incentives

- 1. Merit incentives are earned based on job performance, and only awarded when the employee meets or surpasses the performance elements, as reflected in the Performance Evaluation Report prepared by the employee's supervisor.*

The following table serves as guidance as to the amount of incentive that may be earned by the employee.

<i><u>RATING</u></i>	<i><u>PERCENT INCENTIVE</u></i>
<i>5 = Clearly Exceeds/ Outstanding</i>	<i>5.5- 6% with justification for the high end</i>
<i>≥ 4 = High Meets Expectations</i>	<i>4.5 -5%</i>
<i>≥ 3 = Fully Meets</i>	<i>3.5- 4 %</i>

- 2. Employees become eligible for consideration for merit incentive on the universal evaluation anniversary date and after completion of one full year of employment.*
- 3. In the event of an employee being assigned to a new supervisor during the performance rating period due to a promotion or lateral transfer, an evaluation will be completed by the supervisor prior to the change, and any merit or longevity incentive warranted will be given on a pro-rated basis at that time.*
- 4. If the employee reports to more than one supervisor simultaneously during the reporting period, both supervisors will have input into the evaluation with the primary supervisor being the responsible party for completing and submitting the evaluation report.*
- 5. In the event a merit incentive will cause the employee to exceed the maximum rate of the salary range for the position, the incentive will be given up to the maximum amount allowed and at this point.*

Note: For employees who worked less than the full period in which the incentive was earned, the incentive amount will be pro-rated based on the number of full months they worked during the earning period. The amount for such employee will be based on 1/12th of the full incentive amount multiplied by the number of full months that they worked during the award period.

According to Florida Statutes, F.S. 445.007(9) – Regional Workforce boards states, “Regional workforce boards, their administrative entities, committees, and subcommittees, and other workforce units may authorize expenditures to award suitable framed certificates, pins, or other tokens of recognition for performance by units of the workforce system.”

Payroll Processing

Payroll is processed bi-weekly by Landrum. Bi-weekly timesheets are prepared electronically in Landrum's timesheet system by the employee. Once the timesheet is completed the employee will

electronically approve the timesheet. Their supervisor will also electronically approve the timesheet. The Accounting Specialists review payroll reports for accuracy prior to submitting to Landrum for payroll processing.

Payroll is processed bi-weekly by Landrum. Bi-weekly timesheets are prepared electronically in Landrum's timesheet system by the employee. Once the timesheet is completed the employee will electronically submit their timesheet for approval. Their supervisor will electronically approve the timesheet. The Accounting Manager reviews payroll reports for accuracy prior to submitting to Landrum for payroll processing.

Annual Leave Requirement

Staff who works within Escarosa's Accounting Department shall be required to take five consecutive days (one week) of annual leave each fiscal year. This policy may also be applied to other staff that have access to financial records and/or items which are equal to cash access. This determination will be made by the Executive Director upon consultation with the Chief Financial Officer.

Executive Director is replaced with Chief Executive Officer.

Added:

Schedules of Operations and Holidays

CSE annually implements schedules of operations, to include daily hours of operation and holiday closures, which adopts either the federal, state or appropriate county holiday schedules, per Subgrantee Agreement between CSE and Florida Commerce.

Added:

Benefits

Insurance Waiver Benefits (Local Operating Procedures) – Section XIV. Board Adopted Policies.

ACCOUNTING SYSTEM AND FINANCIAL REPORTING

Accounting System

Escarosa will maintain an accrual accounting system in accordance with generally accepted accounting principles (GAAP). The financial records will contain accurate information pertaining to grant awards and authorizations, obligations, unobligated balances, assets, liabilities, expenditures and income as required by Uniform Guidance 200.302. The system will permit the tracing of all transactions to source documents in order to establish that funds have not been used in violation of the federal regulations, Uniform Guidance and other pertinent policies.

CSE will maintain an accrual accounting system in accordance with generally accepted accounting principles (GAAP). The financial records will contain accurate information pertaining to grant awards and authorizations, obligations, unobligated balances, assets, liabilities, expenditures and income as required by 2 CFR Uniform Guidance 200.302. The system will permit the tracing of all transactions to source documents in order to establish that funds have not been used in violation of the federal regulations, Uniform Guidance and other pertinent policies.

1. The Escarosa's accounting system is based on a chart of accounts that segregates financial information by fund, cost category and expenditure type. The Chief Financial Officer will be responsible for maintaining the chart of accounts and must authorize any new account numbers. *The CSE's accounting system is based on a chart of accounts that segregates financial information by fund, cost category and expenditure type. The Chief Financial Officer or Accounting Manager will be responsible for maintaining the chart of accounts and must authorize any new account numbers.*

Chart of Accounts Overview

The chart of accounts is the framework for the general ledger system, and therefore the basis for Escarosa's accounting system. The chart of accounts consists of account titles and account numbers assigned to the titles. General ledger accounts are used to accumulate transactions and the impact of these transactions on each asset, liability, net asset, revenue, expense and gain and loss account.

Escarosa is replaced with CSE.

Escarosa's chart of accounts is comprised of six types of accounts:

CSE's chart of accounts is comprised of six types of accounts:

Each account number shall be preceded by a three-digit fund code or a two-digit cost pool code and followed by six additional segments denoting various cost categories. The entire general ledger number consists of the following:

Each account number shall be preceded by a three-digit fund code or a two-digit cost pool code and followed by seven additional segments denoting various cost categories. The entire general ledger number consists of the following:

Segment 1	Fund/Cost Pool Code
Segment 2	Object Code (Expense type)
Segment 3	Category 1 Code
Segment 4	Category 2 Code
Segment 5	Contract Code
Segment 6	Miscellaneous Code
Segment 7	Grant Code

Financial Statements

The Chief Financial Officer will prepare financial statements on a monthly basis. The Chief Financial Officer will be responsible for the timely reporting of financial information to the proper funding agency (see Cash Management and Reporting – Federal funds).

The Chief Financial Officer will prepare financial statements monthly. The Chief Financial Officer will be responsible for the timely reporting of financial information to the proper funding agency (see Cash Management and Reporting – Federal funds).

Program Income

Any income generated by a grant or grant-supported activity or earned only as a result of the grant will be put back into the program from which it was generated. This statement applies to Escarosa and its service providers. Service providers will be monitored annually to ensure that this policy is followed. If program income is returned to Escarosa from service providers, it will be used in the program from which it was generated.

Escarosa is replaced with CSE.

PURCHASING

Purchasing Policy

Escarosa will follow the Uniform Guidance 200.317 – 200.326 in the procurement of supplies, equipment, construction, training, and other services.

CSE will follow the Uniform Guidance 2 CFR 200.317 – 200.326 in the procurement of supplies, equipment, construction, training, and other services. Electronic Signature software will be used to sign purchase requisitions, check request, employee travel and purchase orders.

Micro-Purchases:

Procurement by micro-purchases is the acquisition of supplies or services, the aggregate amount of which does not exceed \$3,000 (\$2,000 in the case of acquisitions for construction subject to the Davis-Bacon act). To the extent practicable micro-purchases must be distributed equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the prices are considered to be reasonable.

Procurement by micro-purchases is the acquisition of supplies or services, the aggregate amount of which does not exceed \$10,000. To the extent practicable micro-purchases must be distributed equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if the prices are considered to be reasonable.

Small Purchases:

Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold (\$150,000). If small purchase procedures are used, written price or rate quotations must be obtained from three qualified sources.

Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold (\$250,000.00). If small purchase procedures are used, written price or rate quotations must be obtained from three qualified sources.

Simplified Acquisition Threshold:

Purchases in excess of \$150,000 and/or aggregate units of items or services which annual purchases exceed \$150,000 require either sealed bids or written proposals (see Procurement Section for procedures). Participant support services, i.e. childcare, uniforms, tools, etc. are identified on an individual basis and not considered aggregate units.

Purchases in excess of \$250,000 and/or aggregate units of items or services which annual purchases exceed \$250,000 require either sealed bids or written proposals (see Procurement Section for procedures). Participant support services, i.e. childcare, uniforms, tools, etc. are identified on an individual basis and not considered aggregate units.

Fixed assets with a value of \$5,000 or more will require the Executive Director's approval.

Fixed assets with a value of \$5,000 or more will require the Chief Executive Officer's approval.

Escarosa will prepare a written lease vs. purchase determination for all equipment items, defined as \$5,000 or greater. Annually, during the budgeting process, a determination will be made concerning computer equipment purchases (for equipment under \$5,000). This determination will be documented and kept to support the final decision made.

Escarosa is replaced with CSE.

Documentation for the process will be maintained.

Documentation for the process will be maintained by the Accounting Department.

Purchase Order Procedures

All purchase orders will be prepared using the accounting system Purchase Order Module.

1. Purchase requisitions indicating items or services required, quantity, and program or account to be charged will be prepared by staff members and approved by their immediate supervisor.
2. Completed purchase requisitions will be submitted to the Accounting Specialist for processing. Every effort to choose the most cost effective vendors taking into account price, quality and, when appropriate, delivery time. Minority vendors and/or recycled products will be used when

cost and time permits. Disbarred or suspended vendors as listed in the U.S. General Services Administration Office of Acquisition Policy's "Lists of Parties Excluded from Federal Procurement or Non-procurement Programs" will not be used.
Accounting Specialist is replaced with Senior Accountant.

4. The completed purchase order will be submitted to the Chief Financial Officer for review and signature. The purchase order will be reviewed to determine if the purchase is for an allowable expense and that funds are available in the appropriate program. In the Chief Financial Officer's absence the Executive Director or any Board Director may sign purchase orders.
The completed purchase order will be submitted to the Chief Financial Officer for review and and signed with electronic signature. The purchase order will be reviewed to determine if the purchase is for an allowable expense and that funds are available in the appropriate program. In the Chief Financial Officer's absence the Chief Executive Officer or any Board Director may sign purchase orders through electronic signing.
5. Purchased items are received and signed in by the individual or department requesting the items. Receiving reports are forwarded to the Accounting Specialist and retained to file with the request for payment. If there is no vendor receiving report, the Accounting Specialist will send a copy of the purchase order to the requestor for signature to signify receipt of the items.
Accounting Specialist is replaced with Accounting Clerk in all instances.

SECTION III. COST ALLOCATION PLAN

CareerSource Escarosa has an approved Cost Allocation and Resource Sharing Plan which allocates in accordance with the requirements of Generally Accepted Accounting Principles and the Uniform Guidance. The Cost Allocation Plan is a document separate from the Administrative Plan.
CareerSource Escarosa is replaced with CSE.

SECTION IV. PROCUREMENT

AUTHORITY - PROCUREMENT AND CONTRACTS

The Escarosa Board of Directors shall authorize and sign any and all contracts with service providers that utilize funds under their auspices in excess of \$25,000. A standing committee of the Escarosa Board (designated by the nature of the contract) shall have the authority to terminate contracts and rate proposals. The Committee will then submit the recommendations to the full Board for final approval and/or action. The Executive Director shall sign contracts and contract modifications for Escarosa that do not exceed \$25,000.

Escarosa is replaced with CSE in all instances.

Executive Director is replaced with Chief Executive Officer.

Added:

Contracts between the board and an organization or individual represented on the LWDB require prior approval from Florida Commerce. Contracts between the board and an organization or individual represented on the LWDB may not be included on a consent agenda by the LWDB. Additionally, a member whose organization may benefit from the contract must abstain from voting on the contract. All contracts exceeding \$10,000 between local boards, a relative of a local board, or an employee of the board, which do not require prior approval from Florida Commerce but do require approval by a two-thirds vote of the board.

CSE publishes contracts between a LWDB and a member of the board, a relative of a board member, an

organization or individual represented on the board, or an employee of the board approve on or after July 1, 2021, and requires it to remain published for at least one (1) year after termination of the contract. Any member whose organization may benefit from the contract must abstain from voting on the contract.

Escarosa's procurement policies shall reflect Federal, State and local laws and regulations. Procurement Policies shall comply with Uniform Guidance Parts 200.318- 323.

Escarosa is replaced with CSE.

CONFLICT OF INTEREST/ETHICAL PROCUREMENT POLICIES

Board of Directors

No member of the Board of Directors shall join in discussions related to or cast a vote on the provision of services by that member (or any organization which that member directly represents) or vote on any matter that would provide direct financial benefit to that member or those organizations (Section 141(f) of PL 97-300). Contracts awarded to a related party organization must also be submitted to CareerSource Florida for approval.

No member of the Board of Directors shall join in discussions related to or cast a vote on the provision of services by that member (or any organization which that member directly represents) or vote on any matter that would provide direct financial benefit to that member or those organizations (Section 141(f) of PL 97-300). Contracts awarded to a related party organization must also be submitted to Florida Commerce for approval.

PROCUREMENT PROCESS

Funds Availability

Items/services which exceed \$150,000 in estimated costs shall be budgeted items approved by the Escarosa Board of Directors.

Items/services to be purchased shall be budgeted items approved by the CSE Board of Directors.

Items/services to be purchased where the cost estimate exceeds \$3,000, but does not exceed \$150,000, shall be included in budget line items (previously approved by the Escarosa Board of Directors) and shall be approved by the Chief Financial Officer and the Executive Director.

Items/services to be purchased where the cost estimate exceeds \$25,000, but does not exceed \$250,000, shall be included in budget line items (previously approved by the CSE Board of Directors) and shall be approved by the Chief Financial Officer and the Chief Executive Officer.

Timelines

Notice of the RFP shall be published in at least one newspaper distributed in Escambia and Santa Rosa Counties at least five (5) working days prior to the date set for receipt of letters of intent to bid and/or the date of the bidders' meeting.

Notice of the Request for Proposal (RFP) or Intent to Negotiate (ITN) shall be published in at least one newspaper distributed in Escambia and Santa Rosa Counties as well as posted on the CSE website for at least five (5) working days prior to the date set for receipt of letters of intent to bid and/or the date of the bidders' meeting.

Deadline

Each RFP will contain a deadline date and time for submissions of proposals. The Escarosa staff will carefully log in the receipt of each proposal, ensuring that proposals are date stamped prior to the proposal deadline. Any proposal received after the deadline date and time will be rejected and will not be considered further.

Escarosa is replaced with CSE.

Competition/Solicitations

Bid Requirements

1. All services/items where the cost estimate exceeds \$150,000 shall be obtained using a competitive bid system (Request for Proposals). RFPs shall be rated and reviewed by staff, knowledgeable community members, and/or experts in various fields. The ratings and rankings shall be submitted to a standing committee of the Escarosa Board (designated by the nature of the contract) for review and approval. The Committee will then present a recommendation to the Board for final approval.

All services/items where the cost estimate exceeds \$250,000 shall be obtained using a competitive bid system (Request for Proposals). RFPs shall be rated and reviewed by staff, knowledgeable community members, LWDB Region I Board Members, and/or experts in various fields. The ratings and rankings shall be submitted to a standing committee of the CSE Board (designated by the nature of the contract) for review and approval. The Committee will then present a recommendation to the Board for final approval.

2. All services/items where the cost estimate is under \$150,000, but at or above \$3,000, will require at least three written quotes. Quotes will be submitted to the Chief Financial Officer and Executive Director for approval. All service provider contracts will be submitted to a standing committee of the Escarosa Board (designated by the nature of the contract) and then presented to the final Board for approval.

All services/items where the cost estimate is under \$250,000, but at or above \$10,000, will require at least three written quotes. Quotes will be submitted to the Chief Financial Officer and Chief Executive Officer for approval. All service provider contracts will be submitted to a standing committee of the CSE Board (designated by the nature of the contract) and then presented to the final Board for approval.

3. All services/items where the cost estimate is \$3,000 or below will follow the Micro-Purchase policy.

All services/items where the cost estimate is \$10,000 or below will follow the Micro-Purchase policy.

Sole Source

1. All sole source awards shall be reviewed by a standing committee of the Escarosa Board (designated by the nature of the contract) and shall be submitted to the Board for final approval.

Escarosa is replaced with CSE.

Submission

Proposals may be received by the Executive Director and/or the designated manager involved with the RFP. Proposals may be opened/reviewed by the Executive Director and/or the designated manager. The Executive Director and/or manager will forward the proposals to the appropriate Rating Review Committee members for review and ratings.

Executive Director is replaced by Chief Executive Officer

A log will be kept to note time and date of receipt of proposals.

A log will be kept noting time and date of receipt of proposals.

Source Selection Procedures

7. Proposals in compliance with the RFP will be reviewed and ranked by a designated committee of the Board of Directors. The committee will consist of members appointed by the Chairman and will include the Executive Director and/or appropriate manager.

Executive Director is replaced with Chief Executive Officer

Contractor Responsibility

In the event that a bid is received from an agency and/or business with which Escarosa has not contracted services in the past, an on-sight review, if feasible, or documentation will be required which will demonstrate the agency's ability to perform the services required. This may include letters of reference from other agencies who have contracted with the proposer for similar or like services or verbal confirmation of the above. Proposers who have provided services in the past shall be evaluated based upon past performance.

Escarosa is replaced with CSE.

Procurement Files

Escarosa will maintain procurement files sufficient to detail the significant history of procurement. These files will include necessary information to document the rationale for the method of procurement, selection or agreement type, awardees selection or rejection, and the basis for the agreement price. Items that will be included in the file to fulfill the above are:

Escarosa is replaced with CSE.

3. Bidders' List: Escarosa shall also solicit proposals from all prospective providers who have requested their names to be added to a "bidders' list", which shall be updated once per year. All bidders who have not submitted a proposal within a one-year period or did not renew their intent to bid through written correspondence shall be removed from the bidders' list. Escarosa shall attempt to ensure that current providers on the bidders' list are notified of the RFPs; however, Escarosa assumes no liability for real or prospective losses suffered by potential bidders due to f

Escarosa is replaced with CSE in all instances.

5. RFP Ratings: Rating sheets completed by Escarosa Committee members and as recommended to the Board of Directors.

Escarosa is replaced with CSE.

6. Offeree's Proposals: Submission in response to Escarosa's RFP by potential providers/bidders.

Escarosa's is replaced with CSE's.

Appeal or Protest

Grievances/appeals by the proposer shall be made to the Chair of the standing committee of the Escarosa Board of Directors. The appeal must be submitted in writing within five

(5) days of notification of intent not to fund. The Committee shall review the appeal and shall respond to the submitting organization in writing within ten (10) working days a recommendation to clarify or resolve the appeal. If the finding of the Committee is not satisfactory to the submitting organization, the issue will be forwarded to Escarosa's Executive Committee for final resolution. The Executive Committee shall issue to the submitting organization the final resolution within ten (10) working days of receipt of the appeal. Legal and technical counsel may be involved in this process. If the grievance is based upon discrimination due to race, sex, religion, age, etc., the grievance procedures included in CareerSource Escarosa, Inc.'s "Grievance/Complaint Hearing/Appeal Procedures".

Escarosa/CareerSource Escarosa, Inc. is replaced with CSE in all instances.

CONTRACTS

Contract Type

All contracts shall be line item, cost-reimbursement contracts or fixed unit priced, performance contracts (FUPPC). Whenever possible, line item, cost-reimbursement contracts will be utilized.

Deleted.

Added: All contracts in excess of \$10,000.00 must address termination for cause and for convenience by the non-federal entity including the manner by which it will be effected and the basis for settlement.

Fixed unit price, performance contracts will be utilized in accordance with 20 CFR 629.38(e)(2). If a fixed-price agreement with a nonprofit agency results in revenues in excess of actual costs incurred, the excess revenues are considered to be program income.

Deleted.

Contract Contents

Attachments:

Escarosa Grievance Policies and Procedures

CSE Grievance Policies and Procedures

Contract Administration

2. Contract payments are for completed outcomes or for line-item, cost- reimbursement charges. Advance payments to subcontractors will be allowed under the terms of certain FUPP contracts. Otherwise, advances will not be made.

Contract payments are for completed outcomes or for line-item, cost- reimbursement charges.

3. Contract modifications are allowed if approved by the Escarosa Executive Director. The appropriate staff manager may negotiate modifications; however, approval by the Executive Director is required for implementation of a modification. The Executive Director will sign contract modifications.

Escarosa Executive Director is replaced with CSE Chief Executive Officer in all instances.

4. Escarosa does not allow a prime contractor to subcontract services without prior approval.

Escarosa is replaced with CSE.

5. Escarosa will not extend contracts beyond the first year unless the RFP specifies that three-year proposals are being bid, and interested bidders will need to submit three-year proposals, or unless the RFP states that contracts may be negotiated for extension or modification.

Escarosa is replaced with CSE.

Contract and Agency Disputes

Appeals by the contractor will be made directly to the Executive Director. The contractor must submit a written grievance stating the issues of concern to the Executive Director within ten (10) working days. The Executive Director will attempt to resolve and/or clarify any concerns. If a satisfactory agreement is not reached within ten (10) working days, the issue will be forwarded to the Escarosa Executive Committee. The Executive Committee will make a final decision regarding the issue within ten (10) working days. Legal counsel may be involved in this process. Additional actions will be referred to the Director, Department of Economic Opportunity (DEO).

Executive Director is replaced with Chief Executive Officer.

Escarosa is replaced with CSE.

Department of Economic Opportunity (DEO) is replaced with Florida Commerce.

Contract Files

Active contract files should include contracts, invoices and back-up documentation, revenues expended and received, correspondence, modifications, monitoring reports, progress reports, and equipment/property purchases, if applicable.

Active contract files should include contracts, invoices and back-up documentation, revenues expended and received, correspondence, modifications, monitoring reports, progress reports, and equipment/property purchases in the accounting office, if applicable.

Escarosa will retain records for five years, or per appropriate federal and state requirements, for all contracts. If litigation or an audit question is pending, records will be retained until legal or audit questions are resolved. Contractors must retain original documentation, as specified above, regarding expenditures and revenue.

Escarosa is replaced with CSE.

Contract Closeout

Action to be Taken After Receipt of Notice of Termination:

2. Assign to Escarosa in the manner, at the time and to the extent directed by Escarosa, all of the rights, titles, and interest of the contractor under the orders and subcontracts so terminated. Escarosa shall have the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontractors.

Escarosa is replaced with CSE in all instances.

Payment:

For cost reimbursement agreements, payments will be made for expenditures incurred up to the date that termination notification has been received. The Escarosa must receive the final request for cost reimbursement within thirty (30) days after the termination of the Agreement.

Escarosa is replaced with CSE.

SECTION V. PROPERTY MANAGEMENT

PROPERTY MANAGEMENT POLICY

Escarosa's property management policy and procedures conform to Uniform Guidance Part 200.313.

Escarosa is replaced with CSE.

All tangible personal property with a value of \$5,000 or greater is capitalized as an asset, inventoried and tagged with a unique Escarosa property number. Tangible personal property is defined as non-expendable property with a life expectancy of one year or more. This policy does not pertain to participant training materials that are purchased for the participant to retain permanently.

Escarosa is replaced with CSE.

Tangible property with a value of \$500 to \$4,999 is inventoried and tagged with a unique Escarosa property number. These items have a value to Escarosa and are maintained with the same internal control procedures as capitalized property. This property will be maintained in a separate database and files.

Escarosa is replaced with CSE in all instances.

Staff will notify the Chief Financial Officer and/or the Accounting Specialists immediately of any changes in the status of property, i.e., moves, sales, scrapping, obsolescence, damaged or missing equipment.

Accounting Specialist is replaced with Accounting Manager.

All sales and disposal of property will be in accordance with Uniform Guidance Part 200.313 and at the direction of the Executive Committee.

All sales and disposal of property will be in accordance with 2 CFR Uniform Guidance Part 200.313 and at the direction of the Executive Committee.

PROPERTY MANAGEMENT PROCEDURES

Upon receipt of the personal property as defined above, a Property Record Form will be filled out and a property number assigned. A copy of the accounts payable packet, which should include a check copy, invoice and purchase order, should be attached to the Property Record Form. If physically possible a label stating the property number and "Property of the Workforce Escarosa, Inc." will be attached to the item.

Upon receipt of the CSE property as defined above, the Accounting Manager assigns an asset tag with a property number. A copy of the accounts payable packet, which should include a check copy, invoice and purchase order, should be attached to the Property Record Form. If physically possible a label stating the property number and "Property of the Workforce Escarosa, Inc." will be attached to the item.

1. The Property Record Form will contain, when applicable:

1. The Property Record Form will be entered into MIP (accounting software) and contain, when applicable:

SECTION VI. RECORDS MANAGEMENT AND CONFIDENTIALITY

Escarosa has processes and procedures in place to manage, retain and properly dispose of program and financial records, to include insuring the confidentiality of client personal information.

Escarosa is replaced with CSE.

RECORDS MANAGEMENT

Client Records

Client files are maintained by the service provider delivering services for one year after the client has been terminated or until all follow-up services are completed. The files are then transferred to the designated Escarosa Programs staff individual (by program) for proper storage and safekeeping. Files that have been transferred to Escarosa are archived in locked storage units. Access to units is limited to the designated staff, which retrieves records necessary for monitors and auditors. Client records will be retained for a period of five (5) years, after the final expenditures report for the fiscal year has been submitted to the state as required by the State of Florida policy or until all audits are complete and findings on all claims have been finally resolved, whichever is the longer period of time. Files will be shredded at the archive site in the presence of designated staff.

Escarosa is replaced with CSE in all instances.

CONFIDENTIALITY

While in custody of the service providers the client files are kept in a secure location with access limited to "need to know" personnel, auditors and monitors. Clients do not have access to their files. DEO's Guidance Paper, AWI FG 04-044, concerning data sharing will be followed when sharing of client information between staff and agencies is necessary. Escarosa staff members, service provider and partner staff members must submit annually a "Non-Disclosure and Confidentiality Certification between RWB and Contractors/Subcontractors" form.

DEO's is replaced with Florida Commerce's.

Escarosa is replaced with CSE.

Medical Records

Escarosa has established the following procedures to comply with the Health Insurance Portability and Accountability Act (HIPPA) and place controls on the access of the medical information that participants/applicants share with program staff.

Escarosa is replaced with CSE.

- d. USDOL, DEO, DEO contracted monitors, and Escarosa staff/monitors responsible for program compliance issues will be provided information on request. Participant release forms must be signed by the participants and maintained with their medical record. This release form will state that the participant is aware and agrees to the release of their medical information.

DEO is replaced with Florida Commerce in all instances.

Escarosa is replaced with CSE.

4. Any request for participant medical information from a source not listed above, or in cases where the file custodian is not sure of a specific request for information, he/she will report the request to his/her manager. The manager will coordinate with the Executive Director or Chief Operations Officer (if Executive Director is not available) concerning release of the information.

Executive Director is replaced with Chief Executive Officer in all instances.

Demographic Data

Demographic data (race/ethnicity, sex, age, and disability status) for applicants, registrants, eligible applicants/registrants, participants, terminated participants and employees, employees, and applicants for employment are stored in a manner that ensures confidentiality. The data is maintained in secure files, with access available to authorized personnel only. The data is used only for the purposes of record keeping and reporting; determining eligibility, where appropriate, for WIOA financially assisted programs or activities; determining the extent to which the Escarosa is operating its WIOA financially assisted program or activity in a nondiscriminatory manner; or other uses authorized by law. The data is used for statistical purposes only and is not used in a manner which reveals the identity of the individual.

Escarosa is replaced with CSE.

Subpoena or Public Records Request

In the event there is a subpoena or public records request for confidential information, Escarosa will follow the guidance in AWI FG 02-033. Escarosa will not release any confidential information unless specifically authorized by law. Any subpoena or public records request submitted to an Escarosa staff member or service provider will be forwarded to the Executive Director who will coordinate release of the information with DEO's general counsel. If necessary, Escarosa will contact legal representative. A public records request for non-client Escarosa records must be submitted to the Executive Director who will coordinate release of the records. If necessary, Escarosa will contact legal representation before release of the information.

Escarosa is replaced with CSE.

Executive Director is replaced with Chief Executive Officer in all instances.

DEO's is replaced with Florida Commerce's.

SECTION VII. GRIEVANCE PROCEDURES

The following Grievance Policy is disseminated to each Escarosa staff member, service provider staff member and program participant through a form that the individual signs acknowledging notice of the policy. The forms signed by staff members (Escarosa and service providers) are maintained by Escarosa and the forms signed by program participants are maintained in their client files.

*Member is replaced with members.
Participant is replaced with participants.
Escarosa is replaced with CSE in all instances.*

GRIEVANCE POLICY

Workforce Investment and Opportunity Act (WIOA), Trade Adjustment Act (TAA), Welfare Transition (WT/TANF) and Wagner-Peyser (WP) Program participants and other interested parties (e.g., contractors, One-Stop partners, One-Stop operators, and employers affected by decision or actions of the local workforce system have a right to file grievances/complaints with the local Regional Workforce Board. The grievance/complaint should be filed with CareerSource Escarosa, in accordance with the below listed procedures. In the event you submit a grievance/complaint not under the authority of CareerSource Escarosa, CareerSource Escarosa will notify you within 5 working days from the receipt of the grievance/complaint of the relevant agency responsible for the grievance/complaint.

*Local Regional Workforce Board is replaced with Local Workforce Development Board, Region I.
CareerSource Escarosa is replaced with CSE in all instance.*

Sexual Harassment Policy

An individual or entity desiring a copy of the CareerSource Escarosa Sexual Harassment Policy should write or call CareerSource Escarosa, 3670-2A North “L” Street, Pensacola, FL 32505; telephone number (850) 473-0939.

An individual or entity desiring a copy of the CSE Sexual Harassment Policy should write or call CSE, 6913 North 9th Avenue, Pensacola, FL 32505; telephone number (850) 473-0939.

Reporting Discrimination Complaints

To receive forms and procedures for filing discrimination complaints call DEO at (850) 488-7228 ext 1330, 1340, 1338 or visit the following website:
<http://www.floridajobs.org/civilrights/docs/Complaint%20form.docx>

You may file a discrimination complaint directly with the CareerSource Escarosa EO Officer, Mrs. Janay Sims, 3670-2A North “L” Street, Pensacola, FL 32505, (850) 473- 0939. A **WIOA/TAA** complaint file with the U.S. Department of Labor, Civil Rights Center Discrimination Complaints 200 Constitution Ave., NW, Room N-4123 Washington, D.C. 20210 **and** a copy mailed to DEO, Office for Civil Rights, MSC 150, 107 East Madison Street, Tallahassee, FL 32399-4129; **and** with the EEOC Tampa Area Office 501 East Polk Street, Suite 100, Tampa, FL 33602 (813) 228-2310 or TTY (813) 228-2003. A **WT** complaint file with U. S. Department of Health and Human Services, Office of Civil Rights, Inspector General, Sam Nunn Atlanta Federal Center, 61 Forsyth Street, SW, Suite 3B70, Atlanta, GA 30303 **and** a copy mailed to DEO, Office for Civil Rights, MSC 150, 107 East Madison Street, Tallahassee, FL 32399-4129; **and** with the EEOC Tampa Area Office 501 East Polk Street, Suite 100, Tampa, FL 33602 (813) 228- 2310 or TTY (813) 228-2003. You may file electronically at the following address civil.rights@deo.myflorida.com A **WP** complaint may be filed directly with a local- office EO Officer or with the U.S. Department of Labor, Civil Rights Center Discrimination Complaints 200 Constitution Ave., NM, Room N-4123 Washington, D.C.20210. If the person filing the complaint is sight or speech impaired, they should call the Florida Relay System at 1-800-955-8771 (TTY) or 1-800-955-8770 for voice assistance.

*Forms for filing discrimination complaints can be found at the following website:
<http://www.floridajobs.org/civilrights/docs/Complaint%20form.docx>*

You may file a discrimination complaint by completing the Complaint Information Form found at the above reference website or by sending information listed on the form in writing as directed:

*A **WIOA/TAA** complaint may be filed with CSE’s Equal Opportunity Officer or the U.S. Department of Labor’s Civil Right Center, with a copy to Florida Commerce and the Equal Employment Opportunity Commission, Tampa Area Office. **CSE, Attn: Equal Opportunity Officer, 6913 North 9th Avenue, Pensacola, FL 32504; U.S. Department of Labor, Civil Rights Center, 200 Constitution Avenue, N.W.,***

Room N-4123, Washington, DC 20210; Florida Commerce, Office for Civil Rights, MSC 150, 107 East Madison Street, Tallahassee, FL 32399-429, Equal Employment Opportunity Commission (EEOC), Tampa Area Office, 501 East Polk Street, Suite 100, Tampa, FL 33602, 813-228-2310 or TTY 813-228-2003.

*A **WT** complaint may be filed with U. S. Department of Health and Human Services (U.S. Department of Health and Human Services, Office of Civil Rights, Inspector General, Sam Nunn Atlanta Federal Center, 61 Forsyth Street, SW, Suite 3B70, Atlanta, GA 30303), with a copy mailed to Florida Commerce and EEOC Tampa Area (addresses above). You can file electronically at the following address: civic.rights@deo.myflorida.com*

*A **WP** complaint may be filed with the CSE EO Officer or with the U.S. Department of Labor, Civil Rights Center. See addresses above.*

*You may contact the **Florida Commission on Human Relations, 4075 Esplanade Way, Room 110, Tallahassee, FL 32399, (850) 488-7082** to file a discrimination complaint within 365 days from date of the allege violation.*

Sight and speech impaired person filing a complaint should call the Florida Relay System at 1-800-955-8771 (TTY) or 1-800-955-8770 for voice assistance.

Filing a Grievance/Complaint and Request for Hearing/Appeal with CareerSource Escarosa

*An **WIOA/TAA/WT** individual or entity, adversely affected by an CareerSource Escarosa action, to include but not limited to: displacement of employee; denial or termination as a **WIOA** training provider; denial of eligibility as a **WIOA OJT** or customized training provider; participant sanctioned for using controlled substances; termination of program eligibility or sanctioning for non-compliance with work activities, may submit a Grievance/Complaint or hearing request. Submissions should be concise and clearly written or typed; state the facts, laws, procedures, etc. that the grievant/complainant believes to be relevant for review; and must include a legible address where official notices may be mailed to the grievant/complainant; include the words **REQUEST FOR A HEARING** at the top of the first page in capital letters; and specifically state the type of violation and nature of the action that is the subject of the grievance. The grievance shall be no longer than five pages (exhibits and attachments are not included in the five-page limit) and submitted to CareerSource Escarosa, Executive Director, 3670-2A North "L" Street, Pensacola, FL 32505. If possible CareerSource Escarosa will attempt to resolve the grievance/complaint informally. If the matter cannot be resolved informally, CareerSource Escarosa must establish a hearing date, complete the hearing and issue a decision within a 60-calendar day time frame from the date the grievance/complaint was filed. When the matter is not resolved informally, you will be notified by certified mail return receipt at least 15 calendar days prior to the hearing. The written hearing notice will include: hearing procedures, date, time, and place of the hearing; pertinent sections of the **WIOA**, **WT**, and any federal regulations involved. Affected parties may be represented at the hearing by an attorney or other representative, and may present witnesses or documentary evidence at the hearing. The parties will receive a written decision of the hearing within **30 calendar days** after the hearing by certified mail return receipt requested. Individuals alleging a labor standards violation may submit the grievance/complaint to binding arbitration procedure if the affected parties are covered by a collective bargaining agreement.*

*An **WIOA/TAA/WT** participant or entity presumed adversely affected by an CSE action, to include but not limited to: displacement of employee; denial or termination as a **WIOA** training provider; denial of eligibility as a **WIOA OJT** or customized training provider; participant sanctioned for using controlled substances; termination of program eligibility or sanctioning for non-compliance with work activities, may submit a Grievance/Complaint or hearing request. Submissions should be concise and clearly written or typed; state the facts, laws, procedures, etc. that the grievant/complainant believes to be relevant for review; and must include a legible address where official notices may be mailed to the grievant/complainant; include the words **REQUEST FOR A HEARING** at the top of the first page in capital letters; and specifically state the type of violation and nature of the action that is the subject of the grievance. The grievance shall be no longer than five pages (exhibits and attachments are not*

included in the five-page limit) and submitted to CSE, Chief Executive Officer, 6913 North 9th Avenue, Pensacola, FL 32504. CSE will attempt to resolve the grievance/complaint informally. If the matter cannot be resolved informally, CSE must establish a hearing date, complete the hearing and issue a decision within a 60-calendar day time frame from the date the grievance/complaint was filed. When the matter is not resolved informally, you will be notified by certified mail return receipt at least 15 calendar days prior to the hearing. The written hearing notice will include: hearing procedures, date, time, and place of the hearing; pertinent sections of the **WIOA, WT**, and any federal regulations involved. Affected parties may be represented at the hearing by an attorney or other representative, and may present witnesses or documentary evidence at the hearing. The parties will receive a written decision of the hearing within **30 calendar days** after the hearing by certified mail return receipt requested. Individuals alleging a labor standards violation may submit the grievance/complaint to binding arbitration procedure if the affected parties are covered by a collective bargaining agreement.

WP participants may file discrimination complaints against the Florida Department of Economic Opportunity (DEO) or its employees or complaints alleging discrimination by an employer. Special handling procedures are required for complaints filed by Migrant and Seasonal Farm Workers (MSFW). CareerSource Escarosa shall attempt to resolve the MSFW complaint. If the MSFW complaints cannot be resolved within five working days of receipt of complaint by CareerSource Escarosa, the complaint form and copies of all documents in the complaint file are forwarded to the Florida Department of Economic Opportunity (DEO), Monitor Advocate Office, MSC 150, 107 East Madison St, Tallahassee, FL 32399-4133. Attention: Senior Monitor Advocate.

Florida Department of Economic Opportunity (DEO) is replaced with Florida Commerce in all instances..

CareerSource Escarosa is replaced with CSE in all instances.

*Note: Individuals with a disability needing special accommodations shall call CareerSource Escarosa at (850) 473-0939 or fax at (850) 473-0935 at least five working days prior to the hearing and state what special accommodation requirements are needed in order to participate in the hearing.

CareerSource Escarosa is replaced with CSE.

Right to Appeal

An individual, or entity, adversely affected by CareerSource Escarosa actions or decisions can file an appeal with the State WIOA/TAA Administrative entity. An appeal may be made to the federal level (USDOL) if the state has not conducted a hearing or made a decision regarding the grievance/complaint **within the mandated 60-calendar day timeframe**, or if either party is dissatisfied with the state hearing decision. If the DEO Administrative Entity in conjunction with State Board staff determines that a grievance/complaint filed at the State level should have been decided at the local level, then the grievance/complaint may be remanded back to CareerSource Escarosa.

CareerSource Escarosa is replaced with CSE in all instance.

Filing a Grievance/Complaint and Request for Hearing/Appeal at the State Level

Because of the many types of grievances/complaints and level of hearing/appeals allowed under WIOA/TAA/WT regulations, DEO staff working in conjunction with the State Board staff will be responsible for reviewing and determining the appropriate processing of requests/appeals filed at the State level. The following procedures should be followed when filing a grievance/complaint and/or requesting a hearing/appeal regarding a CareerSource Escarosa decision. The request and/or grievance /complaint for a hearing/appeal should be clearly identified at top of the first page, i.e., **REQUEST FOR HEARING**. The written hearing request should not exceed five pages (not including attachments) and should state the facts, procedures, etc. that the grievant/complainant believes to be relevant for review and, if applicable, shall include any written decision made by

CareerSource Escarosa and an address where official notices may be mailed to the grievant/complainant. The request shall be sent by certified mail return receipt to DEO, Office of General Counsel, MSC 150, 107 East Madison Street, Tallahassee, FL, 32399-4128. The grievant/complainant and CareerSource Escarosa will be contacted at least 5 working days of receipt of the complaint to attempt an informal resolution. If informal methods do not resolve the issue, then a hearing will be scheduled. The complainant/ grievant will be notified of the specific procedures for the hearing and will receive a decision within 60 calendar days from receipt.

Because of the many types of grievances/complaints and level of hearing/appeals allowed under WIOA/TAA/WT regulations, Florida Commerce staff working in conjunction with the State Board staff will be responsible for reviewing and determining the appropriate processing of requests/appeals filed at the State level. The following procedures should be followed when filing a grievance/complaint and/or requesting a hearing/appeal regarding a decision made by CSE. The request and/or grievance /complaint for a hearing appeal should be clearly identified at top of the first page, i.e., REQUEST FOR HEARING. The written hearing request should not exceed five pages (not including attachments) and should state the facts, procedures, etc. that the grievant/complainant believes to be relevant for review and, if applicable, shall include any written decision made by CSE and an address where official notices may be mailed to the grievant/complainant. The request shall be sent by certified mail return receipt to Florida Commerce, Office of General Counsel, MSC 150, 107 East Madison Street, Tallahassee, FL, 32399-4128. The grievant/complainant and CSE will be contacted at least 5 working days of receipt of the complaint to attempt an informal resolution. If informal methods do not resolve the issue, then a hearing will be scheduled. The complainant/ grievant will be notified of the specific procedures for the hearing and will receive a decision within 60 calendar days from receipt.

State and Federal Level Appeal Process

If DEO has not reached a decision on the appeal of a local decision or the grievant disagrees with the decision, the grievant/complainant can file an appeal to USDOL no later than 60 calendar days of receipt of the decision being appealed. That request is submitted by certified mail, return receipt to Secretary USDOL, Attention: ASET, Washington, D.C. 20210. A copy of the appeal must be simultaneously provided to DEO (address above). Actions that may not be appealed to USDOL include: sanctions applied at the local level for using a controlled substance; sanction for non-compliance with work activities; or denial of eligibility as a WIOA/TAA training provider. WP states that non- ES related complaints (employment, discrimination, health and safety, etc.) must be forwarded as soon as possible after being received, to DEO, Office of General Counsel, MSC 150, 107 East Madison St, Tallahassee, FL, 32399-4128, or to the appropriate federal agency with a copy of the complaint sent to DEO Office of General Counsel. If the WP complaint is not resolved within 15 working days, then the complaint and associated file documents are forwarded to the DEO, Office of One-Stop and Program Support, MSC 105, 107 East Madison St, Tallahassee FL 32399-4133, Attention: ES Complaint Coordinator.

DEO is replaced with Florida Commerce.

SECTION VIII. AUDIT PLAN

Escarosa maintains the Audit Plan as a separate document. The Plan conforms to the requirements of Uniform Guidance Subpart F and the "Audit and Audit Resolution Final Guidance AWI FG 05-019" issued August 12, 2005 by DEO.

CSE maintains the Audit Plan as a separate document. The Plan conforms to the requirements of 2 CFR Uniform Guidance Subpart F and the "Audit and Audit Resolution Final Guidance AWI FG 05-019" issued August 12, 2005 by DEO.

SECTION IX. PROCEDURES FOR ESTABLISHMENT AND

COLLECTION OF A DEBT

ESCAROSA agrees to repay from non-federal funds any amounts accrued due to the mis expenditure of funds due to willful disregard of the federal law, gross negligence, fraud/theft, or failure to observe accepted standards of administration. Escarosa does not have any funding which is not federal, therefore, in those instances where the liability does not arise due to willful disregard of the requirements of federal law, gross negligence, or failure to observe accepted standards of administration, Escarosa will request that the State allow repayment of disallowed costs to be reprogrammed into the same program and title. The reprogramming would take place during the program year the funds were obligated by DEO or the two succeeding program years. This is in accordance with Training and Employment Guidance Letter No. 2-87.

Escarosa is replaced with CSE.

DEO is replaced with Florida Commerce.

Escarosa will take prompt and aggressive corrective action upon becoming aware of any evidence of a violation of the federal law.

Escarosa is replaced with CSE.

The necessity for debt collection from a service provider or vendor is expected to be a rare occurrence in the program. Should the situation occur, Escarosa will directly attempt to obtain any required repayment amounts from a business or subcontractor. A registered letter will be sent requesting the repayment within 48 work hours of identification. Requested amounts should be paid within 45 days. If this does not occur, appropriate legal sanctions/actions will be imposed.

Escarosa is replaced with CSE.

SECTION X. MONITORING PLAN

INTRODUCTION

The Monitoring Unit will review, monitor and evaluate programmatic activities of Escarosa and its service providers to ensure compliance with applicable rules and statutes such as: Workforce Investment and Opportunity Act (WIOA), the Trade Adjustment Assistance program (TAA), the Welfare Transition (WT), and Wagner Peyser (WP), The State and Local Plan, The Administrative Plan, and State Policies.

Monitoring Unit is replaced with Program Managers or his/her designee.

Escarosa is replaced with CSE.

It is the intent of this monitoring function to encourage results and improve the overall management, integrity and quality of the programs and activities under the umbrella of CareerSource Escarosa (Escarosa).

CareerSource Escarosa (Escarosa) is replaced with CSE

MONITORING, OVERSIGHT AND EVALUATION PROCEDURES

The Monitoring Unit

The Escarosa Program Monitor(s) is responsible for monitoring, evaluating and reporting on WIOA, TAA, WT and WP Service Provider contracts, special grants and programmatic activities associated with Escarosa. Comprehensive monitoring will ensure effective oversight of program activities, maintenance of program integrity, and constructive evaluation and planning. The Program Monitor(s) reports directly to the Chief Operations Officer.

The CSE Program Monitor(s) is responsible for monitoring, evaluating and reporting on WIOA, TAA, WT and WP Service Provider contracts, special grants and programmatic activities associated with CSE. Comprehensive monitoring will ensure effective oversight of program activities, maintenance of program integrity, and constructive evaluation and planning. The Program Monitor(s) reports directly

to the Chief Operations Officer.

Monitoring Tools

The monitoring tools have been developed and adapted from the Department of Economic Opportunity (DEO) monitoring tool. As with any monitoring activity, the procedures and tools may need to be updated and revised to meet current federal, state or local requirements on an as needed basis. All of the questions on the monitoring tools must be answered. If a question does not apply “X” will be marked.

Department of Economic Opportunity (DEO) is replaced with Florida Commerce.

In performing the monitoring function, Escarosa may use the following objectives:

In performing the monitoring function, CSE may use the following objectives:

- c. Random Sample - a random sample of participant records will be selected to review for compliance with WIOA, TAA, WT, WP, and other programs under Escarosa’s authority and the contractual agreement.

Escarosa’s is replaced with CSE’s.

- 4. Technical Assistance may be provided upon request or at the discretion of Escarosa.

Escarosa is replaced with CSE.

- 6. Incident report - All instances of suspected fraud or criminal malfeasance, misapplication of funds and gross mismanagement in the operation of any program must be reported. In the event that an instance of possible fraud, abuse or mismanagement is uncovered during the routine monitoring visit, the Program Monitor will immediately report the incident to the Executive Director so that the appropriate corrective action can be taken such as deobligation of funds and cancellation of contracts that are not in compliance with federal regulations and/or the contracts themselves.

Executive Director is replaced with Chief Executive Officer.

Deobligation is replaced with DE obligation.

- b. Misapplication of funds should be considered as alleged use of funds, assets or property not authorized or provided for in the grant or contract. This category includes, but is not limited to, nepotism, political patronage, use of participants for political activities, ineligible enrollees, conflict of interest, non-reported income from Federal funds, violation of contract procedures, knowingly or unknowingly violating federal/state law, as applicable. Corrective action may include such activities as technical assistance, guidance, deobligation of funds, cancellation of the contract and/or notification of Escarosa legal counsel.

Escarosa is replaced with CSE.

- c. Gross Mismanagement should be considered as actions or situations arising out of management ineptitude or oversight which leads to major violations of contract provisions and/or which severely hampers accomplishments or achievement of program goals. These include situations which lead to waste of government resources and put into serious jeopardy future support of a particular project. This category includes, but is not limited to, unaudited records, unsupported costs, highly inaccurate fiscal reports and/or program reports, payroll discrepancies, payroll deductions not paid to the Internal Revenue Service and lack of internal control procedures. The corrective action may include technical assistance, guidance deobligation of funds, cancellation of the contract and/or notification of Escarosa legal counsel.

Escarosa is replaced with CSE.

7. A written monitoring report will be completed and submitted to the service providers or the appropriate Escarosa Manager within 20 working days of completion of the formal monitoring activity and may include the following:

Escarosa is replaced with CSE.

- h. Draft Review - the Escarosa Executive Director and Chief Financial Officer may review drafts of any monitoring report.

Escarosa Executive Director is replaced with CSE Chief Executive Officer.

- i. Distribution - the report will be addressed to the service provider's contract representative/department manager and a copy may be provided to the contract operational staff, the Appropriate Program Committee and the appropriate Escarosa staff. Documentation will be maintained to support the findings in the monitoring report.

Escarosa is replaced with CSE.

MONITORING SCHEDULE

A monitoring schedule will be drafted in July of each year to ensure that an orderly and complete review of Escarosa's activities is accomplished within a timely manner. More frequent monitoring may need to be done on a case by case basis if issues are noted that need additional review. The schedule will be provided to the Executive Director and the affected service provider/department heads by the end of July. The schedule may be revised at the agreement of both parties as long as the review is conducted within the fiscal/programmatic year (e.g., July 1-June 30).

Escarosa's is replaced with CSE's.

Executive Director is replaced with Chief Executive Officer.

MONITORING OF PROCUREMENT PROCESS AND ESCAROSA PROPERTY MANAGEMENT

MONITORING OF PROCUREMENT PROCESS AND CSE PROPERTYMANAGEMENT

Bidding Procedures/Process

1. Items/services where the cost exceeds \$150,000:

Items/services where the cost exceeds \$250,000:

2. A sample of the procurement of items/services with a cost that is from \$3,000 to \$150,000:

A sample of the procurement of items/services with a cost that is from \$10,000 to \$250,000:

- b. The purchase was approved by the Chief Financial Officer or the Executive Director.

Executive Director is replaced with Chief Executive Officer.

MONITORING OF SERVICE PROVIDERS/PROGRAMS

Escarosa monitoring procedures for conducting compliance reviews for service provider contracts operated under grants such as WIOA, TAA, WT, and WP will comply with the requirements of 20 CFR 667.400 through 667.500 and in accordance with Uniform Guidance Subpart F.

Escarosa is replaced with CSE.

Service Providers

Service providers will be monitored at least once during the contract period or annually for multi-year contracts. Circumstances such as new programs, number of past findings, concerns, program performance as compared to planned performance or any other factors determined relevant by Escarosa may warrant more than one monitoring review in a given year.

Escarosa is replaced with CSE.

In addition to regular on-site monitoring review, Escarosa may conduct follow-up reviews or special or unannounced visits. The service provider may be subject to a follow-up review at the discretion of Escarosa due to their special nature. These reviews may vary from the standard monitoring procedures.

Escarosa is replaced with CSE in all instances.

6. Review of fiscal records (performed by Escarosa Accounting Staff).

Escarosa if replaced with CSE.

1. Cost Reimbursement

- e. The Contracts Payable Specialist maintains a schedule of payments made against the contract. Each contract invoice is reviewed for compliance with the contract and WIOA/WT/TAA/WP laws before approval for payment. The service provider is required to attach enough backup documentation to the invoice so that compliance can be reasonably determined. Escarosa's Independent Auditor and the State's Fiscal monitoring team reviews compliance for this section.

Contracts Payable Specialist is replaced with Accounting Manager.

Escarosa's is replaced with CSE's.

Technical Assistance

Technical assistance will be provided upon request from the service provider, upon the recommendation of the Program Monitor, and/or upon the direction of the Executive Director. When the Program Monitor observes that the service provider has a lack of understanding of policies and/or procedures required by WIOA/WT/TAA/WP law, he/she will determine whether technical assistance is required and notify the service provider. Technical assistance may also be required when the corrective action plan submitted by the service provider is inadequate.

Technical assistance will be provided upon request from the service provider, upon the recommendation of the assigned Program Monitor, Program Manager and/or upon the direction of the Chief Executive Officer. When the Program Manager observes that the service provider has a lack of understanding of policies and/or procedures required by WIOA/WT/TAA/WP law, he/she will determine whether technical assistance is required and notify the service provider. Technical assistance may also be required when the corrective action plan submitted by the service provider is inadequate.

Deobligation of Funds and Cancellation of Contracts

In the event that issues cannot be resolved through corrective action and/or technical assistance when the service provider is found non-compliant with WIOA/WT/TAA/WP laws, federal regulations and contractual agreements, the Board of Directors may cancel the contract and deobligate the funds. The following procedure would be followed in such a case:

DE obligation of Funds and Cancellation of Contracts

If issues cannot be resolved through corrective action and/or technical assistance when the service provider is found non-compliant with WIOA/WT/TAA/WP laws, federal regulations and contractual agreements, the Board of Directors may cancel the contract and DE obligate the funds. The following procedure would be followed in such a case:

1. The Program Monitor will suggest a corrective action and provide technical assistance.
The Program Monitor will suggest corrective action and provide technical assistance.
2. If the finding is still not resolved, the Program Monitor will notify the Executive Director and the appropriate Escarosa staff.
Executive Director is replaced with Chief Executive Officer.
Escarosa is replaced with CSE.
3. If the finding cannot be resolved through the Executive Director, intervention, and a recommendation will be made to the Board of Directors to cancel the contract and deobligate the funds.
Executive Director is replaced with Chief Executive Officer.

On-the-Job Training

Escarosa will use On-the-Job Training (OJT) contracts as appropriate. OJT contracts will be monitored on an individual basis and may include the following:

Escarosa is replaced with CSE.

4. An OJT monitoring written conclusion (noting any concerns or findings) will be provided to the service provider, the Executive Director, and the Chief Operations Officer within 20 days of the monitoring visit.
Executive Director is replaced with Chief Executive Officer.

Outreach, Recruitment, and Objective Assessment

3. Size of the targeted population applicant pool recruited as compared to the EFM/OSST screen enrollment of these populations.
EFM is replaced with EF/OSST.

Intake and Eligibility

1. A sample of client records from a current service provider EFM listing to show those clients determined eligible since the last monitoring review.
EFM is replaced with EF.

Case Management System

3. The quality of the supportive service system is identified by the effectiveness and timeliness of the case management system in meeting the supportive service needs of the participant during the training component and, if applicable, during employment or work experience. All supportive services must be in compliance with applicable Escarosa Board policies and procedures, federal laws, regulations and policies, dealing with support services and procurement. The specific services must be described in the Career Plan, and/or the counselor's notes.
Escarosa is replaced with CSE.

Community Service Work Experience

2. A monitoring tool will be used to verify the work experience as described in the service provider contract, the WT Handbook, Escarosa Board policies, State WT policies and procedures and

any other compliance documents.
Escarosa is replaced with CSE.

MONITORING THE FISCAL ACTIVITIES

The monitoring of all service providers' fiscal activities is performed by the Accounting Department. The Accounting Department maintains a contract file and payment schedule for each service provider and verifies each invoice submitted against the provisions of the contract. Escarosa requires a level of backup to be submitted with each invoice that will allow determination of validity and allowability of an expense. Escarosa will perform a risk analysis of each service provider taking into account whether a Single Audit was performed and whether the invoice backup was complete and adequate documentation of expenditures. If the service provider does not receive a Single Audit and they are considered high risk based upon documentation, a site visit will be made to review financial procedures and internal control. A report will be submitted for inclusion with the annual monitoring report.
Escarosa is replaced with CSE in all instances.

Escarosa's Audit Plan details the requirements and monitoring procedures for service provider audits and their submittal to Escarosa. The Accounting Department performs these monitoring procedures and maintains the files.
Escarosa's is replaced with CSE in all instances.

REVIEW OF INTERNAL OPERATIONS

A complete review of the internal administrative operations may be performed at the request of the Executive Director or the Board of Directors. Internal hearings may be utilized to monitor and research various internal activities.
Executive Director is replaced with Chief Executive Officer.

SECTION XI. EQUAL OPPORTUNITY PROCEDURES

CareerSource Escarosa maintains a Method of Administration (MOA) plan in a separate document. This plan is updated as required by policy and legal requirements.
CareerSource Escarosa is replaced with CSE.

SECTION XII. PRIOR APPROVAL PROCESS

The Uniform Guidance requires that certain cost items and administrative provisions have approval from the oversight agency prior to expending funds or implementing the administrative provisions. Escarosa will follow the DEO Policy #AWI FG 050406 in order to comply with the circular requirements.
DEO Policy #AWI FG 050406 is replaced with DEO Policy #87.
Escarosa is replaced with CSE.

3. The forms will be submitted electronically to deo.myflorida.com. DEO staff will process the request and email their final decisions to Escarosa.
The forms will be submitted electronically to floridacommerce.myflorida.com. Florida Commerce staff will process the request and email their final decisions to Escarosa.

SECTION XIII. FRAUD POLICY

PRACTICE OF ETHICAL BEHAVIOR

Unethical actions, or the appearance of unethical actions, are unacceptable under any conditions. The policies and reputation of Escarosa depend to a very large extent on the following considerations.

Escarosa is replaced with CSE.

3. Does my action comply with Escarosa policy?

Escarosa is replaced with CSE.

COMPLIANCE WITH LAWS, REGULATIONS AND ORGANIZATION POLICY

Escarosa does not tolerate the willful violation or circumvention of any Federal, state, local, or foreign law by an employee during the course of that person's employment; nor does Escarosa tolerate the disregard or circumvention of Escarosa policy or engagement in unscrupulous dealings. Employees should not attempt to accomplish by indirect means, through agents or intermediaries, that which is directly forbidden.

Escarosa is replaced with CSE in all instances.

Disciplinary Action

Failure to comply with the standards contained in this policy will result in disciplinary action that may include termination, referral for criminal prosecution, and reimbursement to Escarosa or to the federal/state government, for any loss or damage resulting from the violation. As with all matters involving disciplinary action, principles of fairness will apply. Any employee charged with a violation of this policy will be afforded an opportunity to explain her/his actions before disciplinary action is taken.

Escarosa is replaced with CSE.

FRAUD POLICY

Scope

This policy applies to any fraud or suspected fraud involving employees, officers or directors, as well as members, vendors, consultants, contractors, funding sources and/or any other parties with a business relationship with Escarosa. Any investigative activity required will be conducted without regard to the suspected wrongdoer's length of service, position/title, or relationship with Escarosa.

Escarosa is replaced with CSE in all instances.

Policy

Any fraud that is detected or suspected must be reported immediately to the Executive Director, Chief Financial Officer or, if necessary, to the Chair of the Escarosa Executive Committee, who coordinates all investigations.

Executive Director is replaced with Chief Executive Officer.

Escarosa is replaced with CSE.

Actions Constituting Fraud

2. Forgery or alteration of any document or account belonging to Escarosa.

Escarosa is replaced with CSE.

4. Misappropriation of funds, securities, supplies, equipment, or other assets of Escarosa.

Escarosa is replaced with CSE.

7. Accepting or seeking anything of material value from contractors, vendors, or persons providing goods or services to Escarosa. Exception: gifts less than a nominal \$25 in value.
Escarosa is replaced with CSE.

If there is a question as to whether an action constitutes fraud, contact the Executive Director, Chief Financial Officer or, if necessary, the Chair of the Executive Committee for guidance.
Executive Director is replaced with Chief Executive Officer.

Investigation Responsibilities

The Executive Committee has the primary responsibility for the investigation of all suspected fraudulent acts as defined in the policy. The Executive Committee may utilize whatever internal and/or external resources it considers necessary in conducting an investigation. If an investigation substantiates that fraudulent activities have occurred, the Executive Committee will issue reports to appropriate designated personnel and, if appropriate, to the Escarosa Board of Directors.
Escarosa is replaced with CSE.

If suspected fraud or other wrongdoing involves programs funded in whole or in part with federal funds, additional responsibilities, such as special reporting and disclosure to the awarding agency, may apply to the organization. It is the policy of Escarosa to fully comply with all additional reporting, disclosure and other requirements pertaining to suspected acts of fraud as described in award documents.
Escarosa is replace with CSE.

Confidentiality

The Executive Committee, Executive Director and the Chief Financial Officer treat all information received confidentially. Any employee who suspects dishonest or fraudulent activity will notify the Executive Director, Chief Financial Officer or if necessary, the Executive Committee Chair immediately, and should not attempt to personally conduct investigations or interviews/interrogations related to any suspected fraudulent act (see Reporting Procedures section below).
Executive Director is replaced with Chief Executive Officer in all instances.

Investigation results will not be disclosed or discussed with anyone other than those who have a legitimate need to know. This is important in order to avoid damaging the reputations of persons suspected but subsequently found innocent of wrongful conduct and to protect Escarosa from potential civil liability.
Escarosa is replaced with CSE.

Authority for Investigation of Suspected Fraud

Members of the Escarosa Executive Committee will have free and unrestricted access to all Escarosa records and premises, whether owned or rented; and the authority to examine, copy, and/or remove all or any portion of the contents of files, desks, cabinets, and other storage facilities on the premises without prior knowledge or consent of any individual who may use or have custody or any such items or facilities when it is within the scope of their investigations.
Escarosa is replaced with CSE.

Reporting Procedures

An employee who discovers or suspects fraudulent activity will contact the Executive Director, Chief Financial Officer or, if necessary, the Chair of the Executive Committee immediately. The employee or other complainant may remain anonymous. All inquiries concerning the activity under investigation from the suspected individual(s), his or her attorney or representative(s), or any other inquirer should be directed to the Executive Committee or legal counsel. No information concerning the status of an

investigation will be given out. The proper response to any inquiry is “I am not at liberty to discuss this matter.” Under no circumstances should any reference be made to “the allegation”, “the crime”, “the fraud”, “the forgery”, “the misappropriation”, or any other specific reference.

Escarosa is replaced with CSE.

2. Do not discuss the case, facts, suspicions, or allegations with anyone unless specifically asked to do so by the Escarosa legal counsel or the Executive/Audit Committee.

Escarosa is replaced with CSE.

Sarbanes-Oxley Act of 2002

Escarosa will comply with the following requirements of the Sarbanes-Oxley Act of 2002:

Escarosa is replaced with CSE.



INSURANCE WAIVER BENEFITS
LOCAL OPERATING PROCEDURES
JANUARY 23, 2024
DRAFT

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Introduction:

This policy outlines the insurance waiver benefits. This is the process for employees who wish to opt-out of the company-provided health insurance due to having adequate coverage through another source. It also details the financial incentive offered to employees who choose to opt-out.

Eligibility:

- Employees are eligible to opt-out of company-provided health insurance if they can demonstrate proof of comprehensive health insurance coverage from another source, such as:
 - A spouse's employer-sponsored plan
 - Individual or family health insurance plan
 - Government-sponsored health insurance program (e.g., Medicare, Medicaid, Tricare)
- The alternative coverage must provide comparable benefits to the company-provided plan, including coverage for:
 - Inpatient and outpatient hospital care
 - Physician services
 - Prescription drugs
 - Mental health and substance abuse treatment
 - Preventive care

Opt-Out Process:

- Employees interested in opting out must submit a written request to the accounting department, along with proof of their alternative health insurance coverage.
- The accounting department will review the request and determine eligibility.

- Upon approval, employees will be required to sign a waiver acknowledging their understanding of the implications of opting out, including:
 - Loss of company-paid portion of health insurance premiums
 - Ineligibility for company-sponsored health insurance benefits, such as vision and dental coverage
 - Responsibility for any future changes in their alternative health insurance coverage

Stipend:

- As an incentive for opting out, the company will offer a monthly stipend to eligible employees.
- The amount of the stipend will be 50% of the premium cost of current individual plans available to employees.
- The stipend will be taxable income for the employee.

Employee Responsibilities:

- Employees who opt-out are responsible for:
 - Maintaining their alternative health insurance coverage throughout their employment.
 - Notifying the accounting department immediately of any changes to their alternative health insurance coverage.
 - Providing updated proof of coverage annually.

Company Responsibilities:

- The company will:
 - Provide information and resources about the opt-out process and stipend.
 - Assist employees in navigating the opt-out process.
 - Maintain confidentiality of employee health insurance information.

Revisions:

- This policy is subject to change at any time with or without prior notice.

Questions:

- Employees with questions about this policy should contact the accounting department.



INSURANCE WAIVER FORM

This waiver form must be completed by any eligible employee who has voluntarily elected to waive his/her opportunity to participate in the employer-sponsored group health plan.

EMPLOYEE NAME	DATE OF HIRE

I hereby certify that the medical insurance benefits provided by my employer has been explained to me, and that I elect to decline the plan. I understand by declining this offer I may not be offered another opportunity to participate unless I marry, divorce, have a child (natural or adoption), experience an involuntary loss of health benefits, or any other involuntary cause as defined under section 125 of the IRS code. I must request to enroll within 30 days after a qualifying event. I may also enroll during the next open enrollment period.

Reason for decline:

--

Signature: _____

Date: _____

REV COO 1.23.2024

CareerSource Escarosa Board of Directors Membership Update

TOTAL VACANCIES: 6

Business Sector: 4 (Santa Rosa County – 2 | Escambia County – 2)

Labor Organization: 2

Business Sector Members (The majority of the local board membership) – 14 seats

Santa Rosa County: 2 - Vacancies

Escambia County: 2 - Vacancies

Filled Seats: 5 – Santa Rosa County

Filled Seats: 5 – Escambia County

Workforce Sector Members (Not less than 20% of the board membership) – 3 seats

2 – Vacancies in Labor Organization

Filled Seats: 1 – Non-Labor Affiliated registered apprenticeship program (**Michele Kelson**)

Other Sector Members

Filled Seats:

1 – Adult Education/Literacy (**Charlin Knight**)

1 – Institution of Higher Education (**Michael Listau**)

1 – Economic and Community Development Entity (**Shannon Ogletree**)

1 – Vocational Rehabilitation (**Tawana Gilbert**)

*1 – Other entity that administers education and training activities, represents local educational agencies or community-based organizations that have expertise in addressing the education or training needs for individuals with barriers to employment.
(**Kathaleen Cole**)

1 – Community Services Block Grant (**Douglas Brown**)

Upcoming Membership Terms Due to Expire – February 16, 2024

Escambia County Appointed: Jeffrey Hondorp and Anthony Eman

Escambia & Santa Rosa Counties Appointed: Michele Kelson and Douglas Brown

*Dual service role (Business Sector)



CAREERSOURCE ESCAROSA BOARD OF DIRECTORS CRITERIA

The Potential CareerSource Escarosa Board Member(s) Must Represent The Business Sector Or Labor/Apprenticeship Area.

The Business Sector Board Member must meet the following criteria:

1. Are owners of a business, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority
2. Represent businesses, including small businesses, or organizations representing businesses that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in demand industry sectors or occupations locally
3. Are appointed from individuals nominated by local business organizations and business trade associations

The Labor/Apprenticeship Board Member must meet one of the following criteria:

1. Represent a labor organization(s) nominated by local labor federations
2. Represent a labor organization or a training director from a joint labor-management apprenticeship program, or represent an apprenticeship program in the area, if such a program exists
3. Represent community-based organizations that demonstrate experience & expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or provide/support competitive integrated employment for individuals with disabilities
4. Represent organizations that have demonstrated experience and expertise addressing the employment, training, or education needs of eligible youth, including representatives or organizations that serve out-of-school youth



CAREERSOURCE ESCAROSA BOARD OF DIRECTORS

APPLICATIONS NOW OPEN

CareerSource Escarosa is a nonprofit organization committed to supporting the workforce needs of Escambia and Santa Rosa Counties. Classified as one of Florida's 21 local Workforce Boards and a member of the CareerSource Florida Network, we provide employment and training resources for area job seekers and employers. CareerSource Escarosa is led by a group of experienced professionals and a highly engaged Board of Directors. Customers may access our no-cost programs and services by visiting any one of our three Career Center locations. CareerSource Escarosa Board of Directors, a majority of whom represent the private sector, are appointed by the Board of County Commissioners to serve a four-year term. Members cannot serve longer than eight (8) years or two (2) consecutive 4-year terms. Years of appointment are determined by the Board of County of Commissioners.

CareerSource Escarosa and its programs are supported by the Employment & Training Administration of the U.S. Department of Labor; U.S. Department of Agriculture and the U.S. Department of Health & Human Services as part of awards totaling \$5,482,416.00 (Revised Annually)

Board of Director Responsibilities

1. Represents and reflects the mission, values and objectives of CareerSource Escarosa Region 1
2. Regularly attends bi-monthly board meetings
3. Approves annual operating budget and monitors the non-profit's finances and administrative documents as required by the FL DEO/ CareerSource Florida
4. Monitors the performance of the president
5. Looks at critical workplace issues and develops strategic planning goals and objectives
6. Addresses the workforce needs of business and industry as well as the needs of job seekers
7. Recommends policies and strategies to improve both the skill levels of the workforce and the availability of higher skilled jobs
8. Reviews labor market information to address training related to high skill/high wage issues and reviews and makes recommendations about contract awards for service and training providers
9. Provides oversight of CSE centers, recommends policies and strategies to improve the quality of jobs filled by underemployed, including researching, addressing and improving the types of training and delivery systems available to incumbent workers