



WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)

BOARD GOVERNANCE

POLICY/PROCEDURES

Policy Number: Board Policy 6-2025-04-4

 X New Policy

 Revised

Date: June 4, 2025

Subject: CareerSource Okaloosa Walton (CSOW) Board Governance

A handwritten signature in black ink that reads "Michele Burns".

Michele Burns
Executive Director
CareerSource Okaloosa Walton

Board Approval

A handwritten signature in blue ink that reads "Michelle Crocker".

Date: 06/10/2025

Michelle Crocker
Board Chair
CareerSource Okaloosa Walton



Workforce Innovation and Opportunity Act (WIOA)

Board Governance

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A - Functions of the Local Workforce Development Board



Workforce Innovation and Opportunity Act (WIOA) Youth Program

Board Governance

OF INTEREST TO

This local policy is of interest to CareerSource Okaloosa Walton's Board of Directors, Board staff, career center staff and required one-stop partners.

SUBJECT

CareerSource Okaloosa Walton (CSOW) Board Governance Policy

PURPOSE

To provide guidance on the governance structure and responsibilities of the Chief Local Elected Official (CLEO), CareerSource Okaloosa Walton Local Workforce Development Board (LWDB), Board Chairperson, Fiscal Agent, Executive Director, Board staff, and career center staff in accordance with the Workforce Innovation and Opportunity Act (WIOA) and State of Florida policies.

BACKGROUND

Okaloosa Walton Jobs and Education Partnership, Inc., operating as CareerSource Okaloosa Walton (CSOW), serves as the Local Workforce Development Board (LWDB) for Okaloosa and Walton Counties. CSOW is a 501(c)(3) nonprofit organization governed by a Board of Directors appointed by the Chief Local Elected Officials (CLEOs) of each county. The governance of CSOW aligns with the WIOA, applicable Florida Statutes, and CareerSource Florida policies.

Title: Local Policy 05-2025-23 – Board Governance	Date / Revised: New
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REFERENCES

- Workforce Innovation and Opportunity Act (WIOA), Public Law 113-128.
- 20 CFR Part 678 - Description of the One-Stop Delivery System Under Title I of WIOA.

- 20 CFR Part 679 - Statewide and Local Governance of The Workforce Development System Under Title I of WIOA.
- 20 CFR Part 681 - Youth Activities Under Title I of WIOA.
- Chapter 163, Section 163.01, F.S. Intergovernmental Programs.
- Chapter 119, F.S. - Public Records.
- Chapter 286, F.S. - Public Business: Miscellaneous Provisions.
- Sections 445.004, F.S. - CareerSource Florida, Inc., and the state board; creation; purpose; membership; duties and powers.
- Sections 445.007, F.S. - Local workforce development boards.
- CareerSource Florida Administrative Policy 110 - Local Workforce Development Area and Board Governance
- CareerSource Okaloosa Walton Interlocal Agreement, Program Year 2024–2028.
- CareerSource Okaloosa Walton Local Workforce Development Board Bylaws.

PART I – ROLES AND RESPONSIBILITIES

A. CHIEF LOCAL ELECTED OFFICIAL (CLEO)

1. The CLEOs of Okaloosa and Walton Counties serve in a joint capacity through a signed Interlocal Agreement. They are responsible for appointing LWDB members, approving the annual LWDB budget, designating the fiscal agent, reviewing the Executive Director's performance, and ensuring compliance with WIOA planning and performance requirements.
2. They may not delegate the appointment of board members or the designation of the fiscal agent.

B. FISCAL AGENT

1. The fiscal agent, designated by the CLEOs, is responsible for receiving and managing WIOA and other employment and training funds, including discretionary fund, ensuring compliance with fiscal requirements, providing quarterly financial reports, and supporting state and independent audits. The fiscal agent must avoid involvement in program operations or policy unless expressly authorized.
2. At the direction of the Board, the fiscal agent may have the following additional functions:
 - a. Procuring contracts or obtain written agreements;
 - b. Conducting financial monitoring of service providers; and
 - c. Ensuring an independent audit is conducted of all employment and training programs.

3. The fiscal agent must provide financial reports to the Board and CLEO at least quarterly.

C. CAREERSOURCE OKALOOSA WALTON BOARD OF DIRECTORS

1. The Board provides strategic and operational oversight, assists in the achievement of the state's strategic and operational vision and goals, and maximizes and continues to improve quality of services, customer satisfaction, and effectiveness of services provided. The Board sets strategic direction and ensures compliance with WIOA.
2. The Board's responsibilities include approving plans, selecting service providers, conducting performance monitoring, and annually evaluating the Executive Director.
3. The complete listing of the Board's duties and responsibilities are listed in Appendix A.
4. In addition to Appendix A, the Board must conduct regular performance reviews, at a minimum annually, for the executive director. Performance reviews must, at a minimum, include local area performance in the federal and state programs administered by the Board, and state-issued letter grades. Additionally, performance reviews must evaluate the executive director's effectiveness in:
 - a. Ensuring workforce investment activities carried out in the local area enable the Board to meet the corresponding performance accountability measures and achieve fiscal integrity as defined in WIOA sec. 106(e)(2).
 - b. Meeting the functions outlined in Section E. of this policy.
 - c. The annual performance review must be provided to and reviewed by the CLEO(s).
5. The Board must adhere to requirements in the Grantee-Subgrantee Agreement for board member conflicts of interest disclosures and applicable requirements.

D. BOARD CHAIRPERSON

1. Elected from among business representatives on the board, the Chair leads meetings, appoints committees, and represents the board to stakeholders and, when requested, to the state board.
2. The chairperson is limited to two terms in this position. Each term may not exceed two years.
3. The chairperson may not simultaneously act as the employed executive director, chief operating officer, or chief financial officer of any LWDB or career center while in position as the chairperson.
4. The chairperson's duties include but are not limited to:
 - a. Leading the Board to develop a guiding vision that aligns with the state's priorities.
 - b. Acting as the lead strategic convener to promote and broker effective relationships between CLEOs and economic development, education, and workforce partners in the local area.

- c. Leading an executive committee to guide the work of the board, and ensure that committees or task forces have necessary leadership and membership to perform the work of the board.
- d. Leading the agenda setting process for the year and guiding meetings, ensuring both tactical and strategic work is completed in all meetings.
- e. Appointing members to the Education and Industry Consortium.
- f. Providing the annual performance review of the Board's executive director to the CLEO(s) and at least once annually to the Board, and upon request of the LWDB; and
- g. Appearing before the state workforce development board (state board) to discuss the performance of the LWDB, upon the request of the state board.
- h. Education & Industry Consortium

CareerSource Okaloosa Walton maintains a consortium of local education and business leaders who meet quarterly to advise on workforce alignment. The Board will consider the information obtained from the consortium to determine the most effective ways to grow, retain, and attract talent to the service delivery area. The Chair appoints members to two-year terms, and consortium input supports the Board's strategic planning.

E. EXECUTIVE DIRECTOR

1. The Board may hire a qualified executive director and staff to assist in ensuring the functions of the board are achieved. The Executive Director manages daily operations, staff, and partner coordination. The Executive Director serves as the liaison between the board and operations, ensures compliance, and lead performance monitoring and reporting.
2. The Executive Director's duties include but are not limited to:
 - a. Coordinating with the CLEO(s) regarding the identification and nomination of members to the LWDB and ensuring membership is compliant with WIOA and Florida Statutes.
 - b. Organizing local board meetings and ensuring meetings are held according to the LWDB's bylaws and Florida's sunshine laws.
 - c. Developing and submitting the local and regional plan.
 - d. Conducting oversight of the WIOA adult, dislocated worker, youth programs and the entire one-stop delivery system, including development of policies and monitoring the administration of the programs.
 - e. Negotiating and reaching agreement on local performance measures with CLEO and FloridaCommerce.

- f. Ensuring the outcomes of local performance measures are provided to the LWDB members and CLEO no less than semi-annually.
- g. Negotiating with CLEO and required partners for the Memorandum of Understanding (as prescribed in [Administrative Policy 106 - Memorandums of Understanding and Infrastructure Funding Agreements](#)).
- h. In compliance with local board procurement policy, providing oversight of the competitive procurement process for procuring or awarding contracts for providers of youth program services, providers of workforce services (if applicable), and the one-stop operator as required in paragraph (i) of 20 CFR 679.370.
- i. Developing a budget for the activities of the LWDBs.
- j. Certifying the one-stop career centers. One-stop certification requirements may be found in [Administrative Policy 93 - One-Stop Career Center Certification Requirements](#); and
- k. Providing copies of all monitoring and audit reports and related materials to the LWDB members, LWDB chairperson, and CLEO within five business days of receipt.

F. ONE-STOP OPERATOR

CSOW competitively procures its One-Stop Operator. The one-stop operator is the entity or consortium of entities that coordinates service delivery of required one-stop partners and service providers. The Board must use a competitive procurement process to select its one-stop operator and to competitively procure these services every four years. Oversight and conflict-of-interest policies must be followed rigorously.

G. PROVIDER OF WORKFORCE SERVICES

The Board is required to select the provider of workforce services, also known as basic and individualized career services. The Board has the option of being a direct providers of workforce services or awarding grants or contracts for these services with the agreement of the CLEO and the Governor.

H. YOUTH SERVICE PROVIDER

The Board is required to select providers of youth workforce services through competitive grants or contracts. Although, the Board has the option to directly provide some or all youth workforce services rather than awarding grants or contracts for these services. If the Board chooses to award grants or contracts for youth workforce services it must do so through a competitive procurement process in accordance with WIOA sec. 123 and 20 CFR 681.400.

I. TEMPORARY ASSUMPTION OF DUTIES FOR PROCURED AND CONTRACTED SERVICES

The Board may request to temporarily assume the responsibilities that were being provided by a contracted vendor or services being sought when the procurement failed. See CareerSource Florida Policy 110 for more information.

PART II – ONE ENTITY PERFORMING MULTIPLE FUNCTIONS

A. THE BOARD PERFORMING MULTIPLE FUNCTIONS

1. CareerSource Okaloosa Walton may serve in multiple roles (e.g., fiscal agent, board staff, service provider). However, internal firewalls, organizational structure, independent monitoring, and a clearly defined firewall policy must ensure separation of duties and mitigate risks.
2. The Board must ensure that the roles and duties of the workforce delivery system's entities are clearly delineated. This includes efforts to designate and/or procure the functions of the fiscal agent and staff to the Board, one-stop operator, director provider of workforce services, and provider of youth program services. One entity may perform multiple functions if appropriate firewalls and internal controls are in place.
3. Consistent with WIOA sec. 121(d)(4)(A) and (C), the Board must develop a written agreement with the CLEO to clarify how the Board will carry out its responsibilities while demonstrating compliance with WIOA and corresponding regulations, the Uniform Guidance, and conflict of interest policies of both the State and the Board.

B. FIREWALLS

1. Because the Board is serving multiple functions, it must be able to demonstrate that roles, responsibilities and duties of each function are clearly defined and delineated in locally established processes and procedures that clearly detail:
 - a. How functions are sufficiently separated.
 - b. Descriptions of the steps the local area has taken to mitigate risks that could lead to impropriety.
 - c. Firewalls (physical, technological, policies, etc.) created to ensure such risks are mitigated; and
 - d. Oversight and monitoring procedures.
2. These processes and procedures must be included in the Board's WIOA Local Plan.

C. OPERATIONAL STRUCTURE

1. Board of Directors

- a. Through continued communication from the CSOW Executive Director to the CSOW Board of Directors, the message delivered should be that the Board's primary mission is design, oversight, and policymaking, and not the management of day-to-day operations.
- b. Board members and committees should be keenly aware of the distinction between the roles of Board oversight and the Board staff's role in managing the operations.

2. Executive Director

The Executive Director has been designated as the sole person accountable to the Workforce Board. All other Board staff report to and take directions from the Executive Director. The Board's Chief Operating Officer, Administrative, Fiscal, and Quality Assurance staff support the career center operations but report to and take directions from the Executive Director.

3. Chief Operating Officer

- a. The organizational operational structure shows the Executive Director has delegated authority for day-to-day operational management to the Chief Operating Officer (COO). The Chief Operating Officer is responsible for all programs and services provided through the One-Stop Delivery System.
- b. The Chief Operating Officer directs the career center coordinators and Program Managers and Program Coordinators and is accountable for all CSOW and partner staff within the career center or affiliated sites. The COO also directly supervises the Department of Florida Commerce (FloridaCommerce) Senior Manager, who is responsible for all other FloridaCommerce staff in the Career Center.

D. CONFLICT OF INTEREST STATEMENT

Board members are asked to sign an overall Conflict of Interest Statement acknowledging the CareerSource Policy when elected. Staff members must sign a Conflict-of-Interest Statement as part of their New Hire packet acknowledging the CareerSource Conflict of Interest Policy for staff members.

E. ELECTRONIC COMMUNICATIONS

The Board utilizes a dedicated Document Management System (DMS) to store and manage all Board-specific correspondence. The DMS is maintained in accordance with applicable data security and retention policies, ensuring the integrity and confidentiality of Board communications. Access to the DMS is restricted to Board staff only and is not available to operational staff, ensuring proper governance oversight.

F. OVERSIGHT, MONITORING, AND EVALUATION OF PERFORMANCE (FISCAL AND PROGRAM)

1. Fiscal Oversight

CareerSource Okaloosa Walton evaluates fiscal performance through several mechanisms, including:

- a. An annual independent audit conducted by an external accounting firm.
- b. Ongoing and annual fiscal monitoring by FloridaCommerce. And
- c. CSOW has created processes utilizing the Treasurer and the full Board of Directors to provide another layer of review and oversight. The Treasurer reviews and approves monthly bank activity. The full Board receives financials at each Board meeting. The full Board also approves the operating budget. Board members are not responsible for performing day-to-day operations, so this creates another level of oversight. That separation of duties provides a meaningful layer of independent review without significantly increasing cost or administrative burden).

2. Programmatic Oversight

Program performance is assessed through quarterly internal monitoring and an annual independent programmatic review conducted by FloridaCommerce. These evaluations ensure compliance with federal laws, state guidelines, and local requirements.

3. Finance Committee Responsibilities

The Finance Committee, appointed by the Board of Directors, may meet regularly to review the budget, expenditures, reporting obligations, and internal financial statements. The Committee Chair reports to the full Board at regular meetings. The annual independent audit is presented to the Executive Committee and/or the full Board upon completion.

4. Quality Assurance Structure

CSOW employs a full-time Quality Assurance (QA) Manager to support the Board's oversight responsibilities. The QA team includes the Chief Operating Officer (COO) and program-specific managers. Quality assurance is prioritized, with quarterly reviews of all programs and operational processes.

5. Monitoring Action Plans

The QA Manager oversees reviews of management processes, services, and performance for all CSOW monitoring activities. If issues are identified, corrective action plans are developed and implemented as needed.

PART III – GOVERNANCE AGREEMENTS

A. INTERLOCAL, CONSORTIUM, AND OTHER AGREEMENTS

1. Because the local workforce area includes multiple units of general local government, the Chief Elected Officials (CLEOs) must establish a **written interlocal, consortium, or similar agreement** that defines their roles, responsibilities, and liability in accordance with Section 163.01, F.S.

2. Agreements Between CLEOs

- a. CLEOs from each jurisdiction must sign a formal agreement outlining their collective governance of the local workforce development area.
- b. CLEOs are liable in their official capacity (not personally) for the misuse of WIOA funds.

3. Agreement Components

- a. Agreements must, at a minimum, address:

(1) Local Area Identification

Clearly list all participating local governments.

(2) CLEO Designation and Responsibilities

Identify CLEO(s) and specify duties such as approving plans, authorizing expenditures, and addressing audit findings.

(3) LWDB Structure and Appointment

- (a) Detail how the Local Workforce Development Board (LWDB) will be formed, ensuring representation from all jurisdictions.

- (b) Define appointment processes and criteria, including representation equity.

(4) Fiscal Agent Designation

Identify the fiscal agent and outline its responsibilities.

(5) CLEO Input Process

Define how CLEOs will collaborate and provide input on key decisions.

(6) Liability and Financial Responsibility

- (a) Establish how liability for misspent funds or sanctions will be shared.

- (b) Outline financial responsibilities by jurisdiction.

(7) Performance Accountability

Define who negotiates performance measures and how performance is tracked and incentivized.

(8) Dispute Resolution

Include a process for resolving intergovernmental disputes (e.g., mediation, arbitration).

(9) Miscellaneous Provisions

Specify agreement duration and procedures for modification or termination.

B. BOARD BYLAWS

The Board, in partnership with the CLEO, shall maintain bylaws that govern board operations and ensure alignment with the Workforce Innovation and Opportunity Act (WIOA) and state policy. At a minimum, bylaws must address the following:

1. **Purpose and Responsibilities**

Define the Board's purpose (e.g., setting policy and providing oversight) and core functions, including strategic direction, system effectiveness, and alignment with state goals (per 20 CFR 679.370).

2. **Membership**

a. Outline processes for:

- (1) Recruiting, nominating, and appointing members
- (2) Filling vacancies
- (3) Member resignation, disqualification, removal, and reappointment
(Membership requirements per Administrative Policy 091.)

3. **Board Authority**

Specify the Board's powers, including the authority to hire an Executive Director for operational and administrative duties.

4. **Member Duties and Terms**

Define the roles, responsibilities, and term limits of LWDB members (per Administrative Policy 091).

5. **Officers**

Establish officer roles, responsibilities, authority, and term lengths.

6. **Committees**

Describe committee structure (e.g., executive, finance, nominating), membership eligibility, appointment authority, and responsibilities. Staff may not serve as committee members.

7. **Meetings and Minutes**

Detail meeting frequency, planning, and procedures for regular, special, and emergency meetings.

- a. **Record Keeping:** Specify how minutes are recorded, attendance tracked, and votes documented. Minutes must be published publicly within 15 days of LWDB approval.

- b. **Voting and Conflict of Interest:** Define quorum and voting procedures. Document all votes and abstentions, including member names and reasons for abstaining due to conflicts of interest.

PART IV – TRANSPARENCY AND PUBLIC ACCESS

A. WIOA SUNSHINE PROVISION, PUBLIC DISCLOSURES, AND TRANSPARENCY

1. CSOW must comply with Florida's Sunshine and Public Records laws. Under WIOA and applicable state statutes, CSOW must operate in a transparent and publicly accountable manner. The WIOA "sunshine provision" (20 CFR 679.390) requires CSOW to conduct business openly and make information about their activities available regularly through electronic means and public meetings.
2. Additionally, CSOW must comply with the public disclosure and transparency requirements set forth in section 445.007, Florida Statutes, and the Grantee-Subgrantee Agreement. To ensure public accessibility and transparency, the following items must be published and maintained on the CareerSource Okaloosa Walton's website:
 - a. **Local Plans** – Information about the local plan or its modifications must be posted before submission.
 - b. **LWDB Members** – A list of current LWDB members, their affiliations, and terms of service.
 - c. **Selection of One-Stop Operators** – Information regarding LWDB activities in selecting one-stop operators, including RFPs, Q&As, and executed contracts.
 - d. **Notice of All LWDB Meetings** – Notices must be posted at least seven days prior to regular meetings and 72 hours prior to special or emergency meetings.
 - e. **Minutes of Formal LWDB Meetings** – Minutes must be posted within 15 days of approval and retained online for the two most recent years.
 - f. **LWDB Bylaws** – The current bylaws must always be available. Any changes must be posted within 15 days of approval.
 - g. **Interlocal Agreements (if applicable)** – The current interlocal agreement must be posted, with updates published within 15 days of execution.
 - h. **Budget** – The approved local board budget must be posted within 10 days of approval by FloridaCommerce and remain for the fiscal year's duration.
 - i. **Compensation Disclosures** – Total Compensation for Executive Leadership and Other Specific Employees (Exhibit E of the Grantee-Subgrantee Agreement) must be posted within 30 days after the end of the fiscal year and remain for three years, along with a declaration of accuracy signed by the CFO or designee.
 - j. **Employee Position and Salary Information** – A list of current employee positions and their salary details, including bonuses.

- k. **IRS Form 990** – The most recent Form 990 must be published within 60 days of filing and remain posted for three years. The three most recent years must be available.
 - l. **Statements of Financial Interest** – A public notice that such statements have been filed with the Commission on Ethics, including access information, must remain available for the duration of the member's or executive's term and one year after.
 - m. **Single Audit Reports** – The two most recent years of audit reports must be posted.
 - n. **Grants or Contracts to Training Providers** – Awards to providers of workforce investment activities, including those for youth, must be disclosed.
 - o. **Related Party Contracts** – Contracts involving LWDB members or related parties approved on or after July 1, 2021, must be posted within 10 days of approval and retained for at least one-year post-termination. These must be clearly identified as related party contracts.
 - p. **Contracts Over \$35,000** – Executed plain language versions of all contracts exceeding \$35,000 with private entities or government bodies must be posted for the five most recent years.
 - q. **Delegated Agreements** – All active agreements delegating duties under WIOA or the Grantee-Subgrantee Agreement to other boards, regardless of dollar amount, must be posted.
- 3. Board members and staff are expected to maintain the highest standards of integrity, accountability, and transparency in compliance with **Strategic Policy 2018.09.26.A.1 - Ethics and Transparency Policy**, ensuring decisions and actions uphold public trust and avoid actual or perceived conflicts of interest.
 - 4. The Board is subject to open government and confidentiality requirements as outlined in **Chapters 119 and 286, Florida Statutes**. CSOW must designate a **Public Records Coordinator** to ensure that public records requests and disclosures are handled appropriately and in accordance with the law.

PART V – BOARD TRAINING

All board members must complete a Board orientation within six months of appointment to the Board and annual refresher training thereafter. Annual refresher training will be completed between January and June of each Program Year.

PART VI – OTHER ADMINISTRATIVE FUNCTIONS

A. SUGGESTIONS FOR CHANGES OR WAIVERS

Submit a request for changes or waivers to this policy to the CareerSource Okaloosa Walton, 109 8th Avenue, Shalimar, Florida 32579, ATTN: Executive Director or Chief Operating Officer. The request may also be e-mailed to: Policy@careersourceow.com.

- a. Requests for changes must include the suggested change and an explanation of how the change will improve the process.
- b. Requests for **waivers** must include names, effective dates, case notes relating to the waiver, dollar amounts, etc.; and any other documentation to support the request.

B. ACTION REQUIRED

CareerSource staff or providers engaged in determining WIOA eligibility for the WIOA Youth program will implement this local operating procedure upon receipt.

C. TRAINING HOURS: One hour.

SIGNATURE CERTIFICATE



REFERENCE NUMBER

460EDC40-80B1-4A18-83D3-54E18952FE0A

TRANSACTION DETAILS

Reference Number
460EDC40-80B1-4A18-83D3-54E18952FE0A

Transaction Type
Signature Request

Sent At
06/10/2025 11:22 AM CDT

Executed At
06/10/2025 04:29 PM CDT

Identity Method
email

Distribution Method
email

Signed Checksum
7344eb882de7d3f3dfb76a9a73e96beb34cdb5b0a88f2ee1eebea9c4edeb3cfc

Signer Sequencing
Disabled

Document Passcode
Disabled

DOCUMENT DETAILS

Document Name
Board Governance 6-2025-04-4

Filename
Board_Governance_6-2025-04-4.pdf

Pages
16 pages

Content Type
application/pdf

File Size
3.91 MB

Original Checksum
7b96fa221169ecc0d087d8082a3a420cb00c547354d0c7b5c27933ea69bff9fc

SIGNERS

SIGNER	E-SIGNATURE	EVENTS
Name Michelle Crocker	Status signed	Viewed At 06/10/2025 04:29 PM CDT
Email mcrocker@firstnationgroup.com	Multi-factor Digital Fingerprint Checksum 83ccd2e095f7a1c7bdace13f04ec39b63dc074571fe62ce1413c9ab16cace505	Identity Authenticated At 06/10/2025 04:29 PM CDT
Components 2	IP Address 198.233.131.154	Signed At 06/10/2025 04:29 PM CDT
	Device Chrome via Windows	
	Typed Signature 	
	Signature Reference ID D281019F	

AUDITS

TIMESTAMP	AUDIT
06/10/2025 11:22 AM CDT	Sue Berntsen (sberntsen@careersourceow.com) created document 'Board_Governance_6-2025-04-4.pdf' on Microsoft Edge via Windows from 52.45.54.47.
06/10/2025 11:22 AM CDT	Michelle Crocker (mcrocker@firstnationgroup.com) was emailed a link to sign.
06/10/2025 04:29 PM CDT	Michelle Crocker (mcrocker@firstnationgroup.com) viewed the document on Chrome via Windows from 198.233.131.154.
06/10/2025 04:29 PM CDT	Michelle Crocker (mcrocker@firstnationgroup.com) authenticated via email on Chrome via Windows from 198.233.131.154.
06/10/2025 04:29 PM CDT	Michelle Crocker (mcrocker@firstnationgroup.com) signed the document on Chrome via Windows from 198.233.131.154.



Functions of the Local Workforce Development Board

Reference: 20 Code of Federal Regulations (CFR) 679.370.

As provided in WIOA sec. 107(d), the LWDB must:

- (a) Develop and submit a 4-year local plan for the local area, in partnership with the chief elected official and consistent with WIOA sec. 108.
- (b) If the local area is part of a planning region that includes other local areas, develop and submit a regional plan in collaboration with other local areas. If the local area is part of a planning region, the local plan must be submitted as a part of the regional plan.
- (c) Conduct workforce research and regional labor market analysis to include:
 - (1) Analyses and regular updates of economic conditions, needed knowledge and skills, workforce, and workforce development (including education and training) activities to include an analysis of the strengths and weaknesses (including the capacity to provide) of such services to address the identified education and skill needs of the workforce and the employment needs of employers;
 - (2) Assistance to the Governor in developing the statewide workforce and labor market information system under the Wagner-Peyser Act for the region; and
 - (3) Other research, data collection, and analysis related to the workforce needs of the regional economy as the WDB, after receiving input from a wide array of stakeholders, determines to be necessary to carry out its functions
- (d) Convene local workforce development system stakeholders to assist in the development of the local plan under 20 CFR 679.550 and in identifying non-Federal expertise and resources to leverage support for workforce development activities. Such stakeholders may assist the LWDB and standing committees in carrying out convening, brokering, and leveraging functions at the direction of the LWDB.
- (e) Lead efforts to engage with a diverse range of employers and other entities in the region in order to:
 - (1) Promote business representation (particularly representatives with optimum policymaking or hiring authority from employers whose employment

opportunities reflect existing and emerging employment opportunities in the region) on the LWDB.

- (2) Develop effective linkages (including the use of intermediaries) with employers in the region to support employer utilization of the local workforce development system and to support local workforce investment activities.
 - (3) Ensure that workforce investment activities meet the needs of employers and support economic growth in the region by enhancing communication, coordination, and collaboration among employers, economic development entities, and service providers; and
 - (4) Develop and implement proven or promising strategies for meeting the employment and skill needs of workers and employers (such as the establishment of industry and sector partnerships), that provide the skilled workforce needed by employers in the region, and that expand employment and career advancement opportunities for workforce development system participants in in-demand industry sectors or occupations;
- (f) With representatives of secondary and postsecondary education programs, lead efforts to develop and implement career pathways within the local area by aligning the employment, training, education, and supportive services that are needed by adults and youth, particularly individuals with barriers to employment;
- (g) Lead efforts in the local area to identify and promote proven and promising strategies and initiatives for meeting the needs of employers, workers and job seekers, and identify and disseminate information on proven and promising practices carried out in other local areas for meeting such needs;
- (h) Develop strategies for using technology to maximize the accessibility and effectiveness of the local workforce development system for employers, and workers and job seekers, by:
- (1) Facilitating connections among the intake and case management information systems of the one-stop partner programs to support a comprehensive workforce development system in the local area.
 - (2) Facilitating access to services provided through the one-stop delivery system involved, including access in remote areas.
 - (3) Identifying strategies for better meeting the needs of individuals with barriers to employment, including strategies that augment traditional service delivery, and increase access to services and programs of the one-stop delivery system, such as improving digital literacy skills; and
 - (4) Leveraging resources and capacity within the local workforce development system, including resources and capacity for services for individuals with barriers to employment.

- (l) In partnership with the chief elected official for the local area:
 - (1) Conduct oversight of and develop policies for the youth workforce investment activities authorized under WIOA sec. 129(c); adult and dislocated worker employment and training activities under WIOA secs. 134(c) and (d); and the entire one-stop delivery system in the local area.
 - (2) Ensure the appropriate use and management of the funds provided under WIOA subtitle B for the youth, adult, and dislocated worker activities and one-stop delivery system in the local area; and
 - (3) Ensure the appropriate use management, and investment of funds to maximize performance outcomes under WIOA sec. 116.
- (j) Negotiate and reach agreement on local performance indicators with the chief elected official and the Governor.
- (k) Negotiate with CEO and required partners on the methods for funding the infrastructure costs of one-stop centers in the local area in accordance with 20 CFR 678.715 of this chapter or must notify the Governor if they fail to reach agreement at the local level and will use a State infrastructure funding mechanism.
- (l) Select the following providers in the local area, and where appropriate terminate such providers in accordance with 2 CFR part 200:
 - (1) Providers of youth workforce investment activities through competitive grants or contracts based on the recommendations of the youth standing committee (if such a committee is established); however, if the LWDB determines there is an insufficient number of eligible training providers in a local area, the LWDB may award contracts on a sole-source basis as per the provisions at WIOA sec. 123(b);
 - (2) Providers of training services consistent with the criteria and information requirements established by the Governor and WIOA sec. 122.
 - (3) Providers of career services through the award of contracts, if the one-stop operator does not provide such services; and
 - (4) One-stop operators in accordance with 20 CFR 678.600 through 20 CFR 678.635 of this chapter.
- (m) In accordance with WIOA sec. 107(d)(10)(E) work with the State to ensure there are sufficient numbers and types of providers of career services and training services serving the local area and providing the services in a manner that maximizes consumer choice, as well as providing opportunities that lead to competitive integrated employment for individuals with disabilities;

- (n) Coordinate activities with education and training providers in the local area, including:
 - (1) Reviewing applications to provide adult education and literacy activities under WIOA title II for the local area to determine whether such applications are consistent with the local plan.
 - (2) Making recommendations to the eligible agency to promote alignment with such plan; and
 - (3) Replicating and implementing cooperative agreements to enhance the provision of services to individuals with disabilities and other individuals, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination;
- (o) Develop a budget for the activities of the LWDB, with approval of the chief elected official and consistent with the local plan and the duties of the LWDB.
- (p) Assess, on an annual basis, the physical and programmatic accessibility of all one-stop centers in the local area, in accordance with WIOA sec. 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.); and
- (q) Certification of one-stop centers in accordance with 20 CFR 678.800 of this chapter.

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.

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