



WORKFORCE INNOVATION AND OPPORTUNITY ACT

One-Stop Delivery System

Staff Training

POLICY

Policy Number: OS 9-2026-29

 X New Policy Revised

Date: September 29, 2026

Subject: Career Center Staff Training and Credentialing Standards (Interim Policy)

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Staff Training and Credentialing Standards

OF INTEREST TO

Career Center frontline staff delivering services to customers in Okaloosa and Walton Counties.

SUBJECT

Career Center Staff Training and Credentialing Standards

PURPOSE

These instructions formalize CareerSource Okaloosa Walton (CSOW) training and credentialing requirements for frontline and local area staff providing direct customer service to jobseekers, training customers, employers, and business customers. This Local Operating Procedure (LOP) establishes requirements for the Florida Workforce Professional Tier I Certificate, FL WINS Cross Training, continuing education units (CEUs), optional Tier II training, specialized training, advanced training recognition, and documentation and compliance responsibilities consistent with CareerSource Florida Workforce Policy O92.

REFERENCE

- Workforce Innovation and Opportunity Act of 2014, (Public Law 113-128), Section 121.
- Workforce Development Board Policy Directive OS-001, Confidentiality.
- 20 CFR 678.800, 20 CFR 679.370; 34 CFR 361.800, and 34 CFR 463.800.
- TEGL 16-16, One-Stop Operations Guidance for the American Job Center Network.
- [Florida Statutes](#), [Title XXXI](#) - Labor, Chapter 445.007 – Workforce Services.
- Wagner-Peyser Act of 1933, as amended by the Workforce Innovation and Opportunity Act of 2014.
- CSF Policy Number O92, Staff Training and Credentialing, November 13, 2025.
- CareerSource Florida Workforce Policy O124, Statewide Standardization of Tools and Services; Revised 11/13/2025.

Rescissions None	Expiration Date N/A
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BACKGROUND

1. Consistent with Florida’s State Plan and the local Workforce Plan, CareerSource Okaloosa Walton’s Board is responsible for the delivery of services and oversight with respect to the “One-Stop” Delivery System in Okaloosa and Walton Counties, including the CSOW Career Center Credentialing and Staff Skills Standards Programs
2. WIOA requires the State Workforce Development Board, in consultation with Chief Elected Officials (CEO) and Local Workforce Development Boards (LWDB), to establish objective criteria and procedures to use when certifying its American Job Centers (20 CFR 678.800, 34 CFR 361.800, and 34 CFR 463.800). The intent is to develop minimum requirements for all front-line staff who serve customers, without creating requirements that are too restrictive.

POLICY GUIDANCE

A. OBJECTIVES OF THE CONTINUING EDUCATION PROGRAM

1. The release of Workforce Policy Number 092, Staff Training and Credentialing, requires CSOW to refocus its efforts on the oversight of credentialing requirements and skill standards for staff and other Career Center personnel who provide direct services to customers.
2. ***CareerSource Florida’s policy states that training should cover program-specific areas*** to ensure awareness of workforce system strategies and operations, improve efficiency and effectiveness, enhance customer service, and support the objectives of the continuing education requirement, which include:
 - a. Obtain information on current trends.
 - b. Acquire knowledge in specific content areas.
 - c. Master new skills and techniques.
 - d. Expand and upgrade current knowledge and skills.
 - e. Develop critical inquiry skills; and
 - f. Achieve a more balanced professional judgment.

B. STAFF SKILLS STANDARDS

1. Staff skills standards are a key component of Career Center credentialing. All frontline and local area staff providing direct customer service, including applicable temporary staff, work studies, and volunteers, must successfully complete the **Florida Workforce Professional Tier I Certificate** and assigned **FL WINS Cross Training** within 60 days of hire, unless an approved equivalent Tier I training alternative has been authorized by CareerSource Florida and FloridaCommerce.
2. To support compliance with workforce policy and strengthen service quality, several CSOW standards have been identified to ensure that Career Center certification requirements are met and that processes for continuous improvement are in place. The new standards include the following:
 - a. Ensure reasonable accommodation is offered to staff members/test takers with learning disabilities and/or other disabilities.
 - b. Ensure newly hired frontline and local area staff providing direct customer service attain the Florida Workforce Professional Tier I Certificate and complete required FL WINS Cross Training within 60 days of hire.
 - c. Ensure the staff member/test taker makes timely progress toward completion of Tier I and FL WINS requirements, so both are completed within the 60-day deadline.

Note: Supervisors and managers must monitor progress frequently during the first 60 days and intervene promptly when a staff member is at risk of missing the required deadline.

- d. After completing the minimum credentialing requirements (Tier I or an approved equivalent and FL WINS Cross Training), covered staff must complete no less than 15 CEUs annually to maintain ongoing professional development as a **Florida Certified Workforce Professional (FCWP)**.
- e. All training must be documented for each staff member before updating the training record.
- f. Documentation must be maintained and available for review upon request.
- g. ***At least 50% of the required Continuing Education Units (CEU) must come from program-specific training;*** and
- h. **One clock hour of training or one academic credit hour equals one CEU hour.**

3. College Courses:

- a. College courses related to one of the focus areas identified in this policy may be eligible to satisfy Tier I CEU requirements. To request Tier I CEU credit for a college course, the individual must submit an email or letter, along with supporting documentation, through the Program Manager to policy@careersourceow.com. The request must include the course name and a course description of the class submitted for consideration.
 - b. CEU credit will begin accruing on the date the course is approved. Retroactive credit for training completed during the current Tier I certification year may be considered by the Executive Director or designee if valid supporting documentation is submitted.
4. The required 15 CEUs must be related to at least one of the Continuing Education Focus Areas identified in CareerSource Florida Administrative Policy O92 and this local policy.
 5. Only educational or training components of a meeting, conference, or event may be counted toward the 15 CEU requirement.
 6. In addition to the above requirements, the CSOW Training Monitor shall prepare a staff training report or summary as part of each quarterly monitoring cycle. The report shall be made available to the Center Coordinator and Program Managers for review and verification of its accuracy.
 7. CSOW will track continuing education by Program Year (July 1 through June 30) for internal monitoring. Covered staff must complete at least 15 CEUs annually following completion of the minimum credentialing requirements.
 8. Rehired staff who previously attained Tier I must document the certification and complete 15 CEUs within the calendar year of their new hire date, consistent with Workforce Policy O92.
 9. Failure to complete required Tier I, FL WINS Cross Training, or annual CEUs by established deadlines will be addressed by management through an immediate corrective training plan and may result in removal from direct customer-service duties until required credentialing/training is completed, consistent with applicable personnel procedures.

C. MINIMUM SKILLS STANDARDS FOR FRONT-LINE STAFF

1. The following minimum skills standards are required for all front-line staff:
 - a. Customer service competency/training – Within the first 60 days of hire as part of Tier I, FL WINS, or other approved training.
 - b. Communication competency/training – Within the first 60 days of hire as part of Tier I, FL WINS, or other approved training.

- c. Career center technology, case management systems, online resources, and job-related software training – initiated within the first 60 days and continued as job duties require.
- d. Florida Workforce Professional Tier I Certificate and assigned FL WINS Cross Training – Within 60 days of hire.
- e. Covered staff training must also address, as applicable to the employee's role: labor exchange services; Eligible Training Providers List (ETPL) and Florida work-based learning opportunities; the Master Credentials List (MCL); WIOA state and local plans; business outreach; veterans priority of service; labor market information; state workforce policies and technical assistance; performance indicators; accessibility and assistive technology; safety/security/COOP/cyberattack protocols; and ethics/conflict of interest.

Note: Specific-program training should be ongoing throughout the Program Year and includes quarterly program training.

D. CONTINUING EDUCATION FOCUS AREAS

1. The **Continuing Education Focus Areas** are used to determine whether a training activity, class, or course qualifies for credit toward the 15 required Continuing Education Units. Relevancy is determined based on the relationship of the program to the Continuing Education Focus Areas listed below, which include, but are not limited to, the following:
 - a. History and Structure of the Workforce Development.
 - b. **Program-specific** Career Development.
 - c. Labor Market Information (LMI).
 - d. Case Management.
 - e. Accessibility.
 - f. Diversity.
 - g. Customer Service Training.
 - h. Program Management.
 - i. Communications Skills Training.
 - j. Technology.

- k. Collaboration and Problem Solving.
- l. Business Services or Employer Services.
- m. Interpersonal Relations.
- n. **Program-Specific** Software Training.
- o. Basic Computer Software Skills verification or training.
- p. **Program-specific** Training (Wagner-Peyser, Welfare Transition, Supplemental Nutrition Assistance Program, Workforce Innovation and Opportunity Act, including partner programs, etc.).
- q. Any items listed on the CSOW Employee Initial Training Checklist.
- r. Professional Responsibilities; and
- s. Economic Development.

2. Determining Relevancy

- a. A training qualifies for CEU credit when it meets **all** of the following criteria:
 - (1) **Direct alignment** with at least one focus area.
 - (2) **Clear learning objectives** that support professional duties.
 - (3) **Structured instruction** (classroom, virtual, workshop, seminar, conference session, academic course, local training sessions).
 - (4) **Verifiable attendance** or completion; and
 - (5) **Documented duration** (clock hours or academic credit hours).
- b. Activities **not** eligible for CEUs typically include:
 - (1) General staff meetings.
 - (2) Social events.
 - (3) Non-instructional conference time.
 - (4) Training unrelated to job duties or focus area; and
 - (5) A vendor product demonstration without instructional content.

E. STAFF MEMBERS' RESPONSIBILITIES

1. The Career Center Coordinator and Program Managers/Coordinators must:

- a. Ensure all staff members/test takers are aware that reasonable accommodation is available.

- b. Ensure newly hired frontline staff providing direct customer service complete Tier I and assigned FL WINS Cross Training within 60 days of hire.
- c. Monitor progress toward Tier I and FL WINS completion during the first 60 days and develop an immediate corrective training plan when progress indicates the deadline may not be met.
- d. Ensure covered staff complete no less than 15 CEUs annually effective from the date they complete Tier I certification.
- e. Ensure rehired staff with prior Tier I certification complete 15 CEUs within the calendar year of rehire.

Note: When reviewing the Staff Training Report, remember that the hours in the report are tracked by Program Year.

- f. Ensure all training for each staff member/test taker is documented before submitting the results to the Training Monitor; and
- g. Ensure training documentation for each staff member/test taker is maintained and available for review upon request.

2. The staff member should take responsibility for:

- a. Completing Tier I and assigned FL WINS Cross Training within 60 days of hire.
- b. Completing 15 hours of continuing education units during each Program Year; and
- c. Making timely progress toward completion of Tier I and FL WINS requirements and promptly notifying the supervisor of barriers to completion.

Note: Progress must be sufficient to meet the 60-day State credentialing deadline.

3. The CSOW Training Coordinator will:

- a. Ensure staff are enrolled/registered for Tier I and assigned FL WINS Cross Training and monitor completion against the 60-day deadline.
- b. Ensure training documentation is entered into the data system at least quarterly.
- c. Ensure reasonable accommodation is afforded for the staff/test taker as needed.

- d. Ensure the staff/test taker is provided with a quiet location to complete the Tier I Certificate exam.
- e. Obtain documentation to prove the training was completed.
- f. Ensure training documentation is received before updating the training data system; and
- g. Produce the Staff Training Report during the quarterly program monitoring cycle and make available to the Center Coordinator and Program Managers/Coordinators to review and validate its accuracy.

Note: When reviewing the Staff Training Report, remember that the hours in the report are tracked by Program Year.

F. TIER II TRAINING

Tier II is optional, on-demand training that provides detailed information about workforce program services. Staff may self-enroll in topics relevant to their role. Tier II modules qualify for CEUs. Tier II does not have a comprehensive exam required for passing. CSOW elects to use FloridaCommerce Tier II training, so all frontline staff must enroll in the Tier II training.

G. SPECIALIZED TRAINING

1. **Specialized training** means any **program-specific** training required to perform duties associated with a particular workforce program, funding source, target population, or specialized service area. Two examples of specialized training are:
 - a. Completing the Employee Initial Training Checklist (EITC); and
 - b. Ongoing completion of at least 50% of the required 15 annual CEUs through program-specific training within the Continuing Education Focus Areas.
2. Employees eligible for advancement within specialized workforce development roles must complete applicable specialized training as a prerequisite for promotion. Specialized areas may include Welfare Transition, JVSG, WIOA, special grants, business services, veteran services, SNAP, etc. serving individuals receiving public benefits, and frontline services. Program Managers/Coordinators will maintain documentation of completion.
3. For the purposes of the **Specialized training** provision, all frontline staff are considered to work in a specialized workforce development role.

H. BUSINESS SERVICES SPECIALIZED TRAINING

1. In addition to Tier I and FL WINS Cross Training, new and incumbent business services employees must receive specialized training addressing the following:
 - a. Employer engagement and workforce planning.
 - b. Communication and outreach coordination with chambers and economic development organizations.
 - c. Labor market and workforce information.
 - d. Business intelligence technology.
 - e. Talent pipeline development and candidate identification, screening and referral.
 - f. OJT, IWT, Quick Response Training, customized training, registered apprenticeship/pre-apprenticeship and work-based learning.
 - g. Layoff aversion and Rapid Response.
 - h. Incentives and resources including veteran-focused incentives; and
 - i. Customized services such as:
 - (1) HR consultation.
 - (2) Compliance assistance.
 - (3) Retention strategies, and
 - (4) Customized labor market analysis.

I. ADVANCED TRAINING RECOGNITION

1. Program Managers/Coordinators will be responsible to managing the Advanced Training Recognition Program.
2. CSOW may recognize advanced professional development within a board-designated specialization based on documented CEUs:
 - b. Bronze - 30 CEUs;
 - c. Silver - 60 CEUs;
 - d. Gold - 75 CEUs; and

e. Platinum - 100 CEUs.

3. The Chief Operating Officer will be responsible for determining the appropriate recognition for the Advanced Training Recognition Program.

4. The Training Monitor will verify qualifying CEUs and documentation before recognition is assigned. CEUs used for recognition must meet the approved focus areas and documentation requirements in this local policy.

J. ANNUAL REVIEW AND STATE ALIGNMENT

1. This local policy will be evaluated and updated as needed at least annually using staff feedback, performance data, monitoring results, changes in workforce needs, and new state policy/technical assistance.
2. All CSOW staff training must align with applicable CareerSource Florida and FloridaCommerce policies, technical assistance, and Workforce Policy O124, Statewide Standardization of Tools and Services.

K. DOCUMENTATION

1. The Staff Training Report should be forwarded to the Center Coordinator and Program Managers/Coordinators within a timeframe that will allow the review process to be completed before the end of the monitoring cycle (i.e. September 30, December 31, March 31, and June 30). An extension to the due date, if warranted, may be coordinated with the Quality Assurance Manager.
2. For training or credentialing to be accepted as completed, documentation must be tracked and stored consistently. At a minimum, the following must accompany the notice of training completion:
 - a. Details of training or agenda.
 - b. Amount of time for the training.
 - c. Date of the training; and
 - d. Certificate, transcript, FL WINS completion record, attendance record, or other evidence of successful completion, when applicable.
3. The initial staff training will be documented on the Employee Initial Training Checklist (EITC).

4. Advanced and CEUs will be documented in the training management system maintained by the Training Coordinator.

L. **CONFIDENTIALITY**

All data collected as a result of this local policy is for official use only and should only be used in conducting official business. Refer to Board Policy 6-2025-04-2 for more information on the CareerSource Board's confidentiality policy. Privacy of participant's identification is essential.

M. **SUGGESTIONS FOR CHANGES OR WAIVERS**

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

N. **ACTION REQUIRED**

1. CareerSource center and local area staff are required to implement this policy upon receipt.
2. ***All frontline staff and local area staff who have not completed the FL WINS Cross Training must complete the training no later than October 30, 2026.***

O. **TRAINING HOURS FOR SELF-STUDY AND FACILITATED DISCUSSION ACTIVITIES:**

Document Pages	Clock Hours Without Discussion	Clock Hours with Discussion
0-5	:30	:45
6-10	:45	1:15
11-15	1:00	1:45
16-20	1:30	2:15
21-25	2:00	2:45
26-30	2:30	3:15
31-35	3:30	4:0
36-40	4:0	4:30