



## CareerSource Tampa Bay Board of Directors Meeting

**Date:** November 20, 2025 at 10:00 A.M.

**Location:** Hybrid / EpiCenter 13805 58th St. N. Clearwater, FL

**Zoom Information** [Zoom Link](#)  
**Meeting ID:** 881 3540 9600  
**Passcode:** 495545  
**Dial-in-Number:** 1.305.224.1968

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Members of the public may raise their virtual hand during the Public Comment portion of the meeting. Members of the public who do so will be acknowledged by the Chair and provided up to three minutes to make public comment.

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# Pledge of Allegiance



# CEO UPDATE

## Top of Mind

### Paychecks for Patriots

November is **National Veterans and Military Families Month**, in which we recognize the incredible contributions of our brave military and veteran community. In addition to closing our centers in observance of Veterans Day, CSTB held three resource and career fairs for veterans and their families, **Paychecks for Patriots**.

Paychecks for Patriots is a statewide hiring initiative in partnership with CareerSource Florida that connects Florida's veterans, military spouses, and transitioning service members with career opportunities. This initiative, in partnership with Hope Florida, goes beyond the job fair—providing essential wraparound support like housing, healthcare, and transportation to veterans and their families.

At CSTB, our commitment is to the nearly 170,000 veterans in our area. We are dedicated to helping those who have served overcome barriers and contribute their incredible talent to our local workforce and vibrant community. At our October 29 resource fair, 57 veterans, transitioning service members, and eligible spouses attended. Resources to assist the veteran community excel in their careers were provided at no cost, including professional pictures, resume reviews, community supportive services (including interview clothing), and even haircuts.

CSTB and CareerSource Florida co-hosted a media event and career fair on November 6 at the Tampa center, attended by 37 employers and 125 veteran job seekers. A huge thank you to the distinguished speakers and partners who made this spotlight possible:

- Adrienne Johnston, President & CEO, CareerSource Florida
- Kate Doyle, Deputy Secretary, FloridaCommerce
- Jonathan Stephens, Assistant Secretary, Florida Department of Children and Families
- Joe Marino, Executive Director, Veterans Florida
- Colonel Scott Virgil, VP, Program Management, CitiGroup
- Lauren Ozorowsky, Finance Educator, Tampa General Hospital

Several veterans were already hired as a result of the career fairs, with **Moffitt hiring 7 individuals onsite!** Thank you to our attending employers that made the event so impactful for our veterans and military families.

Army & Air Force Exchange • AWP • Bank of America • CareerSource Tampa Bay • Coca Cola • Department of Children & Families • Disney • FDOT • Fifth Third Bank • Florida Department of Veterans' Affairs • GEICO • Hillsborough County Public Schools • Hillsborough County Sheriff's Office • Hillsborough County VSO • Ice Cold Air • JMI Resource • Kane's Furniture • Martinez and Company Inc. • Maximus • Moffitt • Mosaic • National University • NextPath Careers • Ring Power • The Reserves Network • Ring Power Cat • Salvation Army • St. Pete Police Department • Tampa General Hospital • Tampa Police Department • The Sherwin-Williams Company • Titan America • Trusted HomeCare Services • U.S. Border Patrol • United States Postal Service • Veterans Florida • Wise Staffing Group



Press Conference Video:  
<https://bit.ly/4hQ79Qa>

## Federal Government Reopens

A short-term funding extension was reached on November 12, following the longest federal government shutdown in history. During this time, the WIOA program and the majority of CSTB's operations functioned as normal due to the timing of when we receive our state allocations. However, some customers and key labor market data experienced disruptions.

### Supplemental Nutrition Assistance Program (SNAP)

One of the primary programs impacted by this shutdown is **SNAP**, which is administered locally by CSTB. In the 24-25 program year, CSTB served 1,869 SNAP customers. Since July 1, we have assisted more than 2,500 SNAP customers. During this period, staff provided customers with referrals to food assistance organizations and maintained our workshops and employment assistance services. We are relieved that SNAP funding through September 2026 is included in the continuing resolution.

### US Department of Labor (USDOL) Monthly Jobs Report

A report critical to insights of the economy and our work in the workforce development system is the USDOL Bureau of Labor Statistics monthly employment report, which was not published for an unprecedented second straight month. This report uses household and payroll survey data and includes key metrics such as the unemployment rate, nonfarm payroll changes, and labor force participation. It's uncertain if October's report will be released due to a lack of data collection during the shutdown.

We will continue to monitor the developments for approval of the full year FY26 appropriations, which must be determined by January 30 or another lapse in federal funding.



## Spotlight on: Legislative Connections

I am grateful for the opportunity to represent CSTB as I engage with our federal, state and local legislators about the services we offer to their constituents and the significance of workforce boards in the local economy.

### State Legislative Appropriations Request: Veterans Project for Job Recovery

This session, CSTB is requesting legislative appropriations of \$1.5 million to offer enhanced training, employment opportunities, and supportive services to 125 veterans, transitioning service members, and eligible spouses. We sincerely appreciate the support of Senator DiCeglie and Representative Jacques for sponsoring our request at the state level.



### Florida Legislature Human Services Subcommittee Testimony

On October 8, I testified before the Florida Legislature's Human Services Subcommittee on implementing HB 1267 and Welfare Transition provisions. I shared a local workforce board perspective on tools that help clients see how incremental wage gains and credential attainment reduce reliance on public assistance while increasing total household income.



### Meetings with Local Representatives

It was such an honor to host U.S. Rep. Kathy Castor on October 2 at our South County center! She met with former Hillsborough County Commissioner Sandy Murman and me to discuss important community initiatives. We appreciate the Representative taking the time to connect with us. Additionally, I am organizing visits to the Capitol in the upcoming months to raise awareness about our programs and our appropriations request.



### Local Delegation Meetings

I attended the delegation meetings for Hillsborough and Pinellas Counties, in which I had the opportunity to speak regarding CSTB's impact in the community and how we can be a resource to their residents, as well as highlighted our 26-27 session Veterans Project for Job Recovery legislative appropriations request.

## Upcoming

### Youth Program Planning

As we gear up for summer youth recruitment and program planning, I invite the board to actively engage in shaping this summer's initiatives.

### Staff Professional Development Opportunities

We are intentionally expanding professional development and leadership opportunities for our staff, ensuring that everyone can envision a pathway for advancement within CSTB. This includes analyzing feedback from our recent organization-wide training survey, which will inform our future staff training plans and resources.

Some of these initiatives consist of:

- **Town Hall Meetings** that create opportunities for staff to connect with colleagues across different counties and share insights.
- **TAD Grants Workforce and Career Development Certification Training** provided to our Business Services team.
- **Catalyst Network Leadership** coaching and resources for all staff to help us grow leaders at all levels to deliver our mission — to better serve job seekers, employers, and the Tampa Bay community we support every day.

## Questions

I would love to hear from you. As always, please feel free to contact me with any questions or feedback, or to set up a meeting to talk about how we can better serve the residents and businesses of our region.

Thank you for your commitment to CareerSource Tampa Bay's mission of connecting talent to opportunity.

Sincerely,

*Keidrian Kunkel*

**Keidrian Kunkel**  
President & CEO

## MEMORANDUM

**TO:** CareerSource Tampa Bay Board of Directors  
**FROM:** Stephanie Marchman, CareerSource Tampa Bay General Counsel  
**DATE:** November 12, 2025  
**SUBJECT:** Legal Services Summary and Litigation Report

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The following is a summary of legal services provided to CareerSource Tampa Bay (“CSTB”) since September 18, 2025:

- Reviewed and provided legal advice regarding Board Agenda items; attend Board of Directors meeting.
- Issued opinion letter to auditor.
- Furnished legal services in connection with pending and potential litigation matters and provide related advice and representation as required.
- Reviewed and proposed revisions to the Memorandum of Understanding with the Department of Education, Division of Blind Services.

Pending litigation report:

*Jerome Gray v. CareerSource Tampa Bay*, in the Circuit Court of the Thirteenth Judicial Circuit in Hillsborough County, Case Number 23-CA-010204, has been closed since March 3, 2024, due to lack of service. However, in May 2024, Mr. Gray filed a motion with the Court to reopen the case. The Court has not yet changed the case status in this matter to reflect a re-opening.

A lawsuit, *Miesha Lott v. Tampa Bay Workforce Alliance, Inc., D/B/A CareerSource Hillsborough Pinellas* (“CareerSource”), in the Circuit Court of the Thirteenth Judicial Circuit in Hillsborough County, Case Number 25-CA-002343, was served on CSTB on May 21, 2025. On June 10, 2025, CSTB filed a Notice of Removal to the United States District Court in the Middle District of Florida, Case Number 8:25-cv-01509-WFJ-CPT. On June 17, 2025, CSTB moved to dismiss the complaint for failure to state a claim upon which relief may be granted, and Plaintiff responded in opposition to the motion. The parties are awaiting a ruling from the Court on the motion to dismiss. However, given the impending discovery deadline, CSTB has recently served Plaintiff with discovery and is seeking to depose Plaintiff.

A lawsuit, *Shonda Redden-Drake v. Tampa Bay Workforce Alliance, Inc., D/B/A CareerSource Tampa Bay* (“CareerSource”), in the United States District Court for the Middle District of Florida, Case Number 8:25-cv-02012-MSS-LSG, was served on CSTB on August 11, 2025. On August 29, 2025, CSTB filed its Answer and Affirmative Defenses.

A lawsuit, *Takia Rhymes v. Worknet Pinellas now known as Tampa Bay Workforce Alliance D/B/A CareerSource Tampa Bay*, in the Circuit Court of the Sixth Judicial Circuit in Pinellas County, Case No. 25-002982-CI, was filed on June 4, 2025, which CSTB answered on July 3, 2025. The Plaintiff amended her complaint on August 20, 2025. On September 22, 2025 CSTB filed its Answers and Affirmative Defenses.



## **Consent Agenda Items**

*The Consent Agenda is intended to allow the WDB to spend its time on more complex items and initiatives. Consent agenda items groups routine business and reports into one agenda item which can be approved in one action, rather than filing motions on each item separately. Board members may ask that an item be removed from the Consent Agenda for individual consideration.*

### **A. Approval of Minutes**

- 1. September 18, 2025, Board of Directors meeting**
- 2. October 30, 2025, Human Resource Committee meeting**
- 3. November 11, 2025, Ad Hoc Bylaws Committee meeting**

### **D. Approval of Training Provider and New Programs**

- Recommended for approval by the Workforce Performance Committee at the October 8, 2025, committee meeting

### **E. Approval of CSTB Co-Enrollment and Local Monitoring Policies**

- Recommended for approval by the Workforce Performance Committee at the October 8, 2025, committee meeting

**Recommendation:** To approve the above items as recommended by the noted Committee.



## Consent Agenda Item Board of Directors Meeting Minutes



### CareerSource Tampa Bay Board of Directors Meeting Minutes

CareerSource Tampa Bay  
9/18/2025 10:00 AM EDT

@ Hybrid Meeting: Location Zoom & 9215 North Florida Avenue, Tampa, FL 33612

#### **Board Members**

##### **Present:**

Belinthia Berry (remote), Warren Brooks, Barclay Harless, Gary Hartfield, John Howell, Mark Hunt (remote), Michael Jalazo, Shawn McDonnell (remote), April Neumann (remote), Don Noble, Jeremy Robinson (remote), Elizabeth Siplin (remote), Roy Sweatman, Sophia West (remote), Don Blair, Elisa Caro, David Fetkenher (remote), Bob Hyde (remote), Commissioner Latvala (remote), Brian Mann (remote), Esther Sanni (remote), Dr. Rebecca Sarlo (remote), Kenny Wooton, Commissioner Wostal (remote)

##### **Absent:**

Mitch Allen, Robert Blount, III, Joseph Eletto, Elizabeth Gutierrez, Kenneth Williams, Russell Williams, Ocea Wynn, Mercedes Young, Dr. Cynthia Johnson, Brian Nathan

##### CareerSource Tampa Bay Staff

Sheila Doyle, Keidrian Kunkel, Anna Munro, Tammy Stahlgren, Saleema Bennett (remote), Rich Beynon, Kiani Bowman, Dr. Byron Clayton (remote), Jason Druding, Leondra Foster, Chad Kunerth, Barry Martin (remote), Michelle Moeller (remote), Lysandra Montijo (remote), Brittany Munyer (remote), Carla Ortiz Pagan (remote), Michelle Schultz, Don Shepherd, Sean Thorton, Doug Tobin

##### Hillsborough County Government

Jonathan Wolf

##### Legal Counsel

Stephanie Marchman

##### Pinellas County Government

Cody Ward (remote)

##### Others Present

Tameka Austin (remote), Paul Casebolt, Neil Della (remote), Ben Siuda (remote)

- I. Welcome, Roll Call and Introductions (Presenters: Barclay Harless)  
Barclay Harless, Chair called the meeting to order at 10:00 a.m. There was a quorum present.
- II. Pledge of Allegiance (Presenters: Barclay Harless)  
The Pledge of Allegiance was recited.
- III. Public Comments  
There were none.
- IV. CEO Report (Presenters: Keidrian Kunkel)  
The CEO highlighted recent Workforce Development efforts, including media coverage and a successful Coca-Cola job fair with over 340 job seekers. We had 39 Staff participate in the Florida Workforce Development Summit, presenting several workshops.  
  
Upcoming events include the Veterans' Summit and legislative meetings on funding requests. A detailed report is included in the agenda packet.
- V. General Counsel Update (Presenters: Stephanie Marchman)  
The General Counsel provided an update, and no questions were raised by Board members. Members were directed to the meeting packet for the full report.
- VI. Consent Agenda (Presenters: Barclay Harless)
  - A. Approval of Minutes
    1. Approval of Minutes of the July 24, 2025 Board of Directors meeting  
**Motion:**  
To approve the minutes of the July 24, 2025 Board of Directors meeting  
  
Motion moved by Michael Jalazo and motion seconded by John Howell.  
Motion carried.
- VII. Action/Discussion Items
  - A. Finance / Audit Committee Update  
Presenter: Finance/ Audit Chair, Don Noble  
The Finance and Audit Committee met on August 28, 2025.  
  
The Committee reviewed three action items that were approved at today's meeting. (401(k) plan audit for December 31, 2024, approval of the CPA firm, James Moore; and Fiscal Year 2024/2025 Budget Modification #4).



## 1. Action Items

- a. 401k Audit – December 31, 2024

**Motion:**

to accept the Tampa Bay Workforce Alliance, Inc. 401k Plan audit report for the calendar year ending December 31, 2024.

Motion moved by Michael Jalazo and motion seconded by Don Blair. Motion carried.

- b. Approval of CPA Firm – James Moore

**Motion:**

to approve CSTB to enter into contract negotiations with James Moore for audit and tax services. The engagement would be for one (1) year with an option to renew for four (4) additional one (1) year periods.

Motion moved by Mark Hunt and motion seconded by Commissioner Latvala . Motion carried.

- c. Fiscal Year 2024/2025 Budget Modification #4

**Motion:**

to approve the adjustment to the revenue budget and resultant modification to the expenditure budget.

Motion moved by Michael Jalazo and motion seconded by John Howell. Motion carried.

## 2. Discussion Items

- a. Expenditure Reports for the period ending June 30,2025.

Sheila Doyle provided an update on the Expenditure Reports for the period ending June 30, 2025.

There were no questions raised regarding the report.

### B. Workforce Solutions Committee Update

Presenter: Workforce Solutions Committee Chair, Scott Brooks. The committee met on October 8, 2025.

## 1. Action Items

### a. Regional Targeted Occupation List

There were initially 89 occupations recommended for renewal, the committee decided to only remove 7 after thorough discussions.

Chad Kunerth was present to address any specific questions regarding the removals.

#### **Motion:**

To approve the proposed Regional Targeted Occupations List (RTOL). December 31, 2024.

Motion moved by Mark Hunt and motion seconded by Michael Jalazo. Motion carried.

## C. Youth Development Committee Update

Presenter: Youth Development Committee Madam Chair, Esther Sanni. The committee met on August 14, 2025.

### 1. Discussion Items

#### a. Summer PAYS and Summer Hires Program Update and Results (Presenters: Leondra Foster)

Leondra Foster led the discussion on the Summer Youth Employment Experience at St. Anthony's Hospital, noting the program's success in providing students with hands-on exposure to health care and building skills such as patience and teamwork.

#### b. WIOA Youth Q3 PY2425 Primary Indicators of Performance (Presenters: Chad Kunerth)

The program exceeded four out of five goals and met standards on one of the metrics. Overall, we're just very pleased with the performance. Refer to agenda packet for specific details.

#### c. Strategic Planning and Next Steps for Youth Programming

Leondra Foster was introduced as the New Regional Youth Director. She also presented the Youth Programs and Partnerships Update, highlighting ongoing school collaborations, the importance of capturing success stories, and new partnerships to support youth and adult participants.

#### d. Success Stories

Shawn Thornton was recognized for assisting in establishing a partnership with BayCare.

- D. Hillsborough County Targeted Industry Sector Workforce Training and Placement Program Agreement

**Motion:**

To Approve the Hillsborough County Targeted Industry Sector Workforce Training and Placement Program Agreement for the period October 1, 2025, through September 30, 2026.

Motion moved by Michael Jalazo and motion seconded by Don Noble. Motion carried.

- E. Hillsborough County Apprenticeship-to-Career Empowerment Agreement

The board noted a modification to the agreement: Article 68 (Termination) was updated to align with the prior agreement (Article 16), allowing CareerSource Tampa Bay the option to terminate the agreement if necessary.

**Motion:**

To approve the Hillsborough County Apprenticeship-to-Career Empowerment Agreement for October 1, 2025 – September 30, 2026, including a modification to the termination provision in Article 15.

Motion moved by Michael Jalazo and motion seconded by Mark Hunt. Motion carried.

VIII. Information Items

- A. Education and Industry Consortium Quarterly Report

The Education and Industry Consortium met on August 26, 2025. Refer to the agenda packet for the full report.

IX. Future Business

X. Adjournment

The meeting was adjourned at 10:56 a.m.

Minutes submitted by Tammy Stahlgren, Executive Administrative Assistant.



## Consent Agenda Item Human Resource Committee Minutes



### Human Resource Committee Meeting Minutes

CareerSource Tampa Bay  
10/30/2025 3:00 PM EDT

#### Committee Members

##### Present:

Members: Mitch Allen (remote), Elisa Caro, Commissioner Flowers (remote), Barclay Harless (remote), Gary Hartfield (remote), Jeremy Robinson, Sophia West (remote)

##### CareerSource Tampa Bay Staff

Sheila Doyle, Tammy Stahlgren, Barry Martin, Dolores Martinez

##### Hub International

Anne Maria Grabetz (remote), Craig Urquart (remote)

- I. Call to order, Welcome, and Roll Call (Presenters: Elisa Caro)  
Elisa Caro, Madam Chair called the meeting to order at 3:02 p.m. There was a quorum present.
- II. Public Comments (Presenters: Elisa Caro)  
There were none.
- III. Action Items
  - A. Employee Handbook Change (Presenters: Barry Martin)

##### **Motion:**

To approve

- (1) The Employee Handbook name change from CareerSource Hillsborough Pinellas to CareerSource Tampa Bay, and
- (2) The updated language to the Conflicts of Interest policy in the Employee Handbook establishing a defined dollar value limiting the acceptance of gifts to not exceed \$25.00 in value.

Motion moved by Gary Hartfield and motion seconded by Barclay Harless.

Motion carried.

B. Health Plan Renewal Process for 2026

Barry Martin outlined the health plan renewal process for 2026, introducing representatives from HUD International, Craig Urquhart and Anne Marie Grabetz.

After evaluating proposals from United Healthcare and Cigna, Cigna offered a more favorable increase in costs and additional incentives for Medical, Dental and Vision coverage. CIGNA proposed a level funded plan for the Medical Plan and other incentives which could result in future savings for the organization.

A staff survey was conducted in July 2025, and the results were discussed outlining the dissatisfaction with United Healthcare due to prescription management challenges, limited formulary options, higher costs at non-preferred pharmacies, and service issues.

**Motion:**

To approve the selection of CIGNA to provide Medical, Dental and Vision Insurance Plans and UNUM to continue to provide Life Insurance plans to CareerSource Tampa Bay for the 2026 Plan Year.

Motion moved by Gary Hartfield and motion seconded by Barclay Harless.  
Motion carried.

IV. Discussion Items

V. Adjournment

The meeting adjourned at 3:27 p.m.

Minutes submitted by Tammy Stahlgren, Executive Administrative Assistant.





## Consent Agenda Item Ad Hoc Bylaws Committee Meeting Minutes



### CareerSource Tampa Bay Ad Hoc Bylaws Minutes

CareerSource Tampa Bay  
11/10/2025 1:00 PMEST

@ Hybrid / 4350 W. Cypress Street, Suite 875, Tampa FL 33607

#### **Committee Members**

##### **Present:**

Don Blair (remote), Barclay Harless (remote), Gary Hartfield (remote), Dr. Brian Mann (remote), Don Noble (remote), Elizabeth Siplin (remote)

##### CareerSource Tampa Bay Staff

Tammy Stahlgren (remote), Keidrian Kunkel, Anna Munro, Sheila Doyle (remote)

##### Hillsborough County Government

Katherine Benson (remote), Ken Jones (remote), Jonathan Wolf

##### Board Counsel

Stephanie Marchman (remote)

#### I. Call to Order, Roll Call, and Welcome

Dr. Brian Mann, Committee chair, called the meeting to order at 1:00 p.m. There was a quorum present.

#### II. Public Comments

There were none.

#### III. Discussion Items

##### A. Current Bylaws

CSTB's current Bylaws were provided for committee review and reference.

##### B. Proposed Changes, Next steps and Timeline

Presenters: Keidrian Kunkel and Anna Munro

The authority to establish, amend or replace the Bylaws lies solely with the Consortium (Interlocal Agreement, Article 4.2). CareerSource Tampa Bay

Bylaws Committee is an Ad Hoc Committee formed by the Board Chair to review the Bylaws and bring recommendations to the Board of suggested updates to the Bylaws for Consortium consideration and approval.

The Ad Hoc Bylaws Committee reviewed the organization's Bylaws for legal compliance, operational efficiency, and governance practices. The following immediate recommended changes were proposed. The committee had no further recommendations.

Proposed changes:

- Revise section 9.1A of the Bylaws to define the frequency of Board meetings as recommended by Florida Department of Commerce.
- Update DBA to CareerSource Tampa Bay throughout the document.
- Revise Board Officer Positions, Nominations and Elections, section 6.1 of the ByLaws to allow for same county representation of the Consortium Chair and 2nd Vice Chair.
- Update Related Party, Bylaws section 10.4, to correctly reference the conflict-of-interest section as 10.3.

**Motion:**

To approve, the board of directors will meet from time-to-time as it deems necessary and appropriate, but not less than quarterly, to conduct business as may be necessary.

Motion moved by Barclay Harless and motion seconded by Gary Hartfield.  
Motion carried.

**Motion:**

To approve the DBA update from "CareerSource Hillsborough Pinellas" to "CareerSource Tampa Bay" throughout the ByLaws and revise section 10.4 Related Party Contracts' to correctly reference the conflict of interest from section 9.3 to 10.3.

Motion moved by Barclay Harless and motion seconded by Elizabeth Siplin.

**Motion:**

To strike the last sentence in section 6.1 Board Officers Positions, Nominations and Elections, "The 2nd Vice Chair shall not be from the same County as the Consortium Chair during the same program year".

Motion moved by Gary Hartfield and motion seconded by Barclay Harless.

Motion carried.

Next Steps:

- Present proposed Bylaws revisions to the Board of Directors on November 20, 2025.
- Present Bylaws revisions for consideration and approval at the Consortium meeting on December 3, 2025.

**Motion:**

To move forward with the recommended changes to the Bylaws

Motion moved by Gary Hartfield and motion seconded by Barclay Harless.

IV. Adjournment

The meeting was adjourned at 1:30 p.m.

Minutes submitted by Tammy Stahlgren, Executive Administrative Assistant.



## **Action Item**

### **Approval of Training Provider's Programs**

#### **Background**

Effective July 1, 2024, the initial and continued eligibility application process, previously performed at the local level, changed to a statewide application. New training providers and programs must first be approved on the State ETPL before they can be considered locally. Once a provider is approved at the state level, they may request inclusion on the CareerSource Tampa Bay's (CSTB) ETPL.

The Eligible Training Provider List (ETPL) is the official list of training programs and providers eligible for WIOA funds to train eligible program participants. The ETPL and related eligibility procedures ensure the accountability, quality, and labor-market relevance of training programs that receive WIOA funds. Training Providers on the ETPL must be recognized/ licensed by an appropriate public or private governing body. Non-Public Postsecondary institutions must be licensed by the State Board of Independent Colleges and Universities, State Board of Non-Public Career Education, or Commission for Independent Education (CIE).

WIOA utilizes "informed consumer choice" in the selection of a Provider. A WIOA participant who has been determined eligible for training may select a Provider and program from the ETPL after consultation with an applicable CSTB staff. Unless training funds are not available, participants are issued an Individual Training Account (ITA) voucher for training which may pay in whole or in part for the cost of training depending on current funding levels, local policy, and/or ITA dollar limits. Being listed on the ETPL does not guarantee that students will attend a training providers educational facility or choose their program.

FL Statutes 445.007(6), excerpt:

*Consistent with federal and state law, the local workforce development board shall designate all local service providers and may not transfer this authority to a third party. Consistent with the intent of the Workforce Innovation and Opportunity Act, local boards should provide the greatest possible choice of training providers to those who qualify for training services. A local board may not restrict the choice of training providers based upon cost, location, or historical training arrangements. However, a local board may restrict the amount of training resources available to any one client.*

#### **ITA and Enrollment for New Programs**

- ITA Cap: Lifetime cap up to \$5,000 per individual
- New Programs: Limit enrollments to a maximum of 12 to establish performance

## Information

### Access Computer Training – Existing Training Provider with New Programs

1537 Dale Mabry Hwy #101, Lutz, FL 33548

Access Computer Training's new training program submissions was approved through the State ETP Portal on November 1, 2024 and May 19, 2025, by the State ETPL Coordinator. Additionally, CSTB staff coordinated with the training provider to secure supplemental documentation, including the school catalog and CIE license, dated 8/1/2024.

**Financial Assistance:** Access Computer Training is a private institution and does not accept financial aid but will help students with applications for training grants through local workforce development boards as well as internal scholarships offered. For training programs exceeding the local ITA cap of \$5,000, students will not incur any out-of-pocket expenses and Access Computer Training will provide institutional scholarships specifically to cover the portion of the tuition that exceeds the local ITA cap.

Program – Type of Degree or Certificate	Books & Supplies	Tuition	Fees	Total Cost	Duration of Training	Completion/ Employment Rate	Average Wage at Placement
IT Network & Security Professional	\$400.00	\$11,500.00	\$250.00	\$12,150.00	15 weeks	N/A - New Program	N/A - New Program
Comp TIA Pentest+	\$400.00	\$3,500.00	\$250.00	\$4,150.00	4 weeks	N/A - New Program	N/A - New Program
CompTIA Cloud+	\$400.00	\$3,500.00	\$250.00	\$4,150.00	3 weeks	N/A - New Program	N/A - New Program
CompTIA CySA+	\$400.00	\$3,500.00	\$250.00	\$4,150.00	4 weeks	N/A - New Program	N/A - New Program
Cyber Defense & Incident Response Professional	\$400.00	\$10,000.00	\$250.00	\$10,650.00	9 weeks	N/A - New Program	N/A - New Program
Office Administration	\$400.00	\$10,000.00	\$250.00	\$10,650.00	15 weeks	N/A - New Program	N/A - New Program
Scrum Certification Prep	\$400.00	\$995.00	\$250.00	\$1,645.00	2 weeks	N/A - New Program	N/A - New Program
Microsoft Azure AZ900/AZ104 Certification Prep	\$400.00	\$3,300.00	\$250.00	\$3,950.00	2 weeks	N/A - New Program	N/A - New Program
ITIL 4.0 Certification Prep	\$400.00	\$1,895.00	\$250.00	\$2,545.00	1 week	N/A - New Program	N/A - New Program
Project Management Professional Certification (PMP) Prep	\$400.00	\$3,000.00	\$250.00	\$3,650.00	2 weeks	N/A - New Program	N/A - New Program

**No performance data is available.** The programs are newly introduced at the institution and were recently added to the State ETP Portal.



## New Training Programs Occupation & Wage Info:

Employment and wage statistics associated with the training programs outlined above.

Access Computer Training													
EF Related & Selected Occupations per Training Provider					2024 Occupational Employment & Wage Statistics (OEWS)								
	SOC Code	Occupation Title	Local TOL	HSHW	2024 Employee	Mean	Median	Entry	Exp	P10	P25	P75	P90
IT Network & Security Professional	151231	Computer Network Support Specialists	Yes	HSHW	1,120	37.08	36.57	24.59	43.33	22.25	26.96	44.33	53.45
	151241	Computer Network Architects	Yes	HSHW	1,360	62.00	62.37	41.77	72.12	38.23	48.70	76.73	81.38
	151252	Software Developers	Yes	HSHW	14,520	59.35	60.76	37.79	70.13	32.16	46.47	75.94	80.80
Comp TIA Pentest+	113021	Computer and Information Systems Managers	Yes	HSHW	5,860	82.05	80.04	54.10	96.03	49.23	62.54	97.57	113.53
CompTIA Cloud+	151231	Computer Network Support Specialists	Yes	HSHW	1,120	37.08	36.57	24.59	43.33	22.25	26.96	44.33	53.45
	151252	Software Developers	Yes	HSHW	14,520	59.35	60.76	37.79	70.13	32.16	46.47	75.94	80.80
CompTIA CySA+	151211	Computer Systems Analysts	Yes	HSHW	7,350	53.50	49.10	35.05	62.72	31.00	39.51	62.73	75.56
Cyber Defense & Incident Response Professional	151212	Information Security Analysts	Yes	HSHW	2,770	55.93	50.12	35.66	66.07	35.28	40.07	67.74	81.21
	151231	Computer Network Support Specialists	Yes	HSHW	1,120	37.08	36.57	24.59	43.33	22.25	26.96	44.33	53.45
Office Administration	439061	Office Clerks, General	Yes		26,860	21.94	21.17	15.59	25.11	14.56	17.31	24.81	30.32
Scrum Certification Prep	113021	Information Systems Managers	Yes	HSHW	5,860	82.05	80.04	54.10	96.03	49.23	62.54	97.57	113.53
Microsoft Azure AZ900/AZ104 Certification Prep	151241	Computer Network Architects	Yes	HSHW	1,360	62.00	62.37	41.77	72.12	38.23	48.70	76.73	81.38
ITIL 4.0 Certification Prep	113021	Computer and Information Systems Managers	Yes	HSHW	5,860	82.05	80.04	54.10	96.03	49.23	62.54	97.57	113.53
Project Management Professional Certification (PMP) Prep	131082	Project Management Specialists	Yes	HSHW	9,980	49.28	46.80	30.43	58.71	27.68	36.15	61.12	77.49
	119199	Managers, All Other	Yes	HSHW	7,220	55.60	50.03	25.77	70.52	22.79	29.98	73.01	89.83

## Program Performance for Access Computer Training Approved Training Programs

(Period: 7/1/2024-9/22/2025):

Program	Served	Finished Training	Successfully Completed Training	Successful Completion Rate	Employed	Employment Rate	Avg Wage	Training Related Employment	Training Related Rate	Training Related Wage	Avg Days to Employment	Final Score
Introduction to Bookkeeping *Bookkeeping, Accounting, and Auditing Clerks	3	3	3	100%	1	33.3%	\$ 17.29	1	100%	\$ 17.29	77.0	67.00
Businss Application (BAPP) *Computer Systems Analysts	1	1	1	100%	1	100%	\$ 21.50	1	100%	\$ 21.50	102.0	
Businss Application (BAPP) *Computer User Support Specialists	1											
Businss Application (BAPP) *First-Line Supervisors of Office and Administrative Support Workers	2	2	2	100%	2	100%	\$ 18.65	2	100%	\$ 18.65	101.0	

## Training Program Performance - Definitions

Column Heading	Definition
Served	Number of individuals active in the training program during the reporting period.
Finished Training	Number of individuals who completed training either successfully or unsuccessfully during the reporting period.
Successfully Completed Training	Number of individuals who successfully completed training during the reporting period.
Successful Completion Rate	Number of individuals who successfully completed training divided by the number who finished training.
Employed	Number of individuals who finished training and entered employment.
Employment Rate	Number of individuals that have successfully completed training and entered employment divided by number of customers that have successfully completed training.
Avg Wage	Average wage of individuals that have successfully completed training and entered employment
Training Related Employment	Number of individuals who have successfully completed training and found training related employment.
Training Related Rate	Number of individuals that have successfully completed training and found training related employment divided by the number of customers that have successfully completed training and found employment
Training Related Wage	Average wage of individuals that have successfully completed training and entered training related employment
Average Days to Employment	Average number of days after successfully completing training for customers to begin training. Customers who obtain employment prior to the completion of training are not counted in this measure.
Final Score	Score is based on the ranking of the performance metrics with the following weight; 25% completion rate 25% employment rate 5% Training related employment rate 25% average wage rate 5% training related wage rate 15% average days to employment rate.  Minimum of 3 exiters to count performance.

## Recommendation

Workforce Solutions Committee recommends approval of the existing provider, Access Computer Training's, ten new training programs for inclusion on CSTB's ETPL.



## **Consent Agenda Item**

### **Approval of CSTB Co-Enrollment and Local Monitoring Policies**

#### **Information**

These policies establish formal guidance to CareerSource Tampa Bay (CSTB) staff and partners in accordance with CareerSource Florida and Florida Department of Commerce standards, as well as applicable state and federal laws, rules, regulations, and policies.

<b>Policy No.</b>	<b>Title</b>	<b>Description</b>
P-05-V1	Co-Enrollment Policy	This policy establishes guidelines for the co-enrollment of participants in multiple programs to leverage resources and provide comprehensive support to participants without duplication of services.
A-14-V1	Local Monitoring Policy	This policy establishes guidelines for monitoring processes that evaluate the services and activities administered by CareerSource Tampa Bay (CSTB) to ensure compliance with applicable state and federal laws, rules, regulations, and policies.

#### **Action**

The Workforce Solutions Committee recommends approval of the Co-Enrollment and Local Monitoring Policies.



Policy No.:	<b>A-14-V1</b>
Policy Title:	<b>Local Monitoring Policy</b>

Issue Date:	Upon Approval by the CSTB Board of Directors
Revision Date(s):	N/A
Program Area:	Administration
Subject:	Compliance
Purpose:	This policy establishes guidelines for monitoring processes that evaluate the services and activities administered by CareerSource Tampa Bay (CSTB) to ensure compliance with applicable state and federal laws, rules, regulations, and policies.
Distribution:	CSTB Staff, FloridaCommerce Staff and Partner Organizations
Contact:	VP of MIS and Data Services or their designee

## Purpose

This policy establishes guidelines for monitoring processes that evaluate the services and activities administered by CareerSource Tampa Bay (CSTB) to ensure compliance with applicable state and federal laws, rules, regulations, and policies. The local monitoring process also intends to reduce the number of findings across all programs while minimizing systemic issues for files overseen by CSTB Quality Assurance staff during FloridaCommerce monitoring, data validation visits, and third-party independent monitoring events.

## Background

Services and activities provided under WIOA must be monitored annually for compliance with WIOA requirements by FloridaCommerce pursuant to Section 185(c), WIOA. FloridaCommerce will monitor the requirements outlined in their policies, as well as the local workforce development board (LWDB) and local operating procedures. LWDBs must establish local monitoring policies and procedures that include, at minimum, the requirements outlined in FloridaCommerce administrative and workforce policies.

## Policy Strategy

The CSTB's local monitoring strategy focuses on the following key areas:

- **Commitment to Continuous Improvement:** Remain adaptable to the needs of the organization and different departments.
- **Targeted Mini Monitoring Reviews:** Create specific reviews to identify weaknesses and provide training and improvement opportunities.
- **Comprehensive Staff Training:** Ensure that staff fully understand the tools and scoring mechanisms.
- **Proactive Management Updates:** Keep management informed of trends, issues, and concerns.
- **Showcase Results:** Present findings and recommend plans for continuous improvement.

- **Cross-Training Opportunities:** Offer chances for team members to enhance their knowledge across various areas in Quality Control.
- **CSTB's 95% Accuracy Rating:** Assist the organization in achieving their target accuracy rating of 95%.
- **Timely Reporting:** Provide reports promptly to maintain transparency and accountability.
- **Preparation for Monitoring Visits:** Develop tools and procedures for effective and efficient monitoring visits (i.e., Annual FloridaCommerce Monitoring, Data Validation, OIG, USDOL) utilizing SharePoint, Teams Channel, and implementing Corrective Action Plans, along with reviewing responses.
- **Best Practices Identification:** Recognize effective practices both locally and statewide to improve productivity.

## Department Functions

### 1. Quality Reports

- a. Reports will include results by individual staff members and programs with specific details of individual cases and specific monitoring items distribution.
- b. Reports will be focused on reviews of areas to provide technical training to staff based on the current statewide programmatic tools.
- c. Quality reports will be produced to include all targeted monitoring areas, displaying performance percentages by staff and program.
- d. Data will be analyzed to identify trends and root causes to assist with continuous improvement recommendations by reporting all applicable issues to appropriately identified team members.
- e. Areas of weakness, as identified by third-party monitoring firm, will be reviewed for opportunities of improvement, training, and technical assistance to reduce recurring error rates.

### 2. Formal Corrective Action Plan Guidance

- a. Program Monitors will coordinate and schedule CAP meetings with the appropriate Program Coordinators, Directors, and management staff to discuss any issues identified in the monitoring.
- b. Program Monitors will provide recommendations and targeted technical assistance to Directors, Supervisors, and their staff to improve deficiencies and meet a 95% accuracy goal. The quality control team will discuss and determine an appropriate timeframe to respond and correct issues identified. Staff will be held accountable to their respective deadlines to ensure CSHP attempts to rectify any points as soon as possible before action can no longer be taken.

## Methodology

### Sample Size

Each programmatic monitoring area will be monitored, using Florida Commerce monitoring tools, and a minimum sample size that achieves a confidence level of 95% with a margin of error of 5% over the program year.



## Monitoring Sources

The following applications and tools are to be used where applicable:

- Employ Florida (electronic file repository; case management and job order database for WIOA, TAA, and WP)
- OSST (case management database for WT and SNAP)
- FloridaCommerce Monitoring Tools (monitoring and results stored for all programs)
- Card Tracker System (software containing reports for support services issued to participants)
- CSTB Policies and Procedures
- CSTB SharePoint folder
- FLORIDA (DCF Access System)
- FloridaCommerce and CareerSource Florida Administrative Policies

Where applicable, on-site file review and desk audits may occur to provide real-time monitoring results.

## Monitoring

### State Monitoring

Each Program Year, FloridaCommerce conducts programmatic monitoring at the regional board level. The state monitoring is coordinated and assisted by the QA department. The results from the state monitoring will be used to prioritize areas for increased or decreased local monitoring.

### Post-Monitoring and Staff Training

#### Staff Development Training

Training will be developed and provided as part of the CAP meetings for staff where issues were identified by the QA Team. Additional technical assistance is available through the MIS and Quality Assurance departments by request and may also be recorded for future reference for staff.

### Continuous Improvement

Internal Program Monitors will continue to examine our operational flow, performance measurements, staff functions, integrity of monitoring data, and statewide and national trends throughout the PY. The monitoring department may make suggestions of any necessary adjustments to the department plan to ensure operational success and achievement of established goals.

## References

- [WIOA, Public Law 113-128](#)

## History

Date	Action	Description
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TBD	Issuance	Initial approval by the CSTB Board of Directors.
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## Attachments

- [CSTB QC Plan](#)
- [Internal Monitoring and Quality Control Procedure](#)

## Other Resources

- N/A

DRAFT



Policy No.:	<b>P-05-V1</b>
Policy Title:	<b>Co-Enrollment Policy</b>

Issue Date:	Upon Approval by the CSTB Board of Directors
Revision Date(s):	N/A
Program Area:	Programs and Services
Subject:	Program Services and Eligibility
Purpose:	This policy establishes guidelines for the co-enrollment of participants in multiple programs to leverage resources and provide comprehensive support to participants without duplication of services.
Distribution:	CSHP Staff, FloridaCommerce Staff and Partner Organizations
Contact:	VP of MIS and Data Services or their designee

## Purpose

This policy establishes guidelines for the co-enrollment of participants in multiple programs to leverage resources and provide comprehensive support to participants without duplication of services.

## Background

Co-enrollment occurs when an eligible participant is enrolled in more than one workforce program to support and optimize the participant's success. Co-enrolling WIOA participants in multiple core and special grant programs aims to provide comprehensive support by leveraging resources and services from different programs to better meet the needs of individuals seeking employment and training assistance. Co-enrollment allows participants to benefit from the combined strengths of these programs, such as receiving both job training and educational services simultaneously. This integrated approach helps improve employment outcomes and ensures that participants receive a more holistic set of services tailored to their specific needs. Furthermore, co-enrollment necessitates a high level of communication and coordination amongst program staff to maximize effectiveness and avoid the duplication of services.

Consistent with WIOA Section 108 related to local plans and 20 CFR 679.560(2), local plans should describe how the local workforce development board (LWDB) works with entities carrying out core programs to facilitate the development of career pathways and co-enrollment, as appropriate, and must include strategies designed to leverage resources from all partners including partner agencies, for participants who may be eligible for co-enrollment (including youth, individuals with disabilities, trade-certified workers, veteran services, etc.). In these efforts, LWDBs should also be guided by other relevant policies and technical guidance such as the approaches and objectives outlined in [CareerSource Florida Policy 2021.12.09.A.1 – Comprehensive Employment, Education, and Training Strategy](#).

# Policy

## Co-Enrollment in Multiple Programs

### 1. Wagner-Peyser Program Services

- a. **All customers over the age of 18** shall be co-enrolled in Wagner-Peyser services as determined by the program and/or youth (ages 18-24) goals.
- b. **In-School Youth** (ISY) through Temporary Assistance to Needy Families (TANF) funding for summer youth will be dependent on the youth's employment goals.

### 2. Coordination with Welfare Transition Program (WTP) and Supplemental Nutrition Assistance Program (SNAP) Employment and Training (E&T) Programs

- a. Where possible and appropriate, SNAP E&T/WT participants should be co-enrolled with WIOA to provide Able-Bodied Adults Without Dependents (ABAWDs) with an opportunity to become competitive in the workforce while receiving services and meeting their hourly work requirements.

### 3. Coordination with the WIOA Youth Program

- a. Individuals aged 18-24 may be eligible for both the WIOA Youth and Adult programs and can be co-enrolled in the two programs. CSTB staff will coordinate the adult and dislocated worker programs with the youth program to maximize flexibility and service delivery to eligible populations. Determinations regarding the appropriate program for the participant are based on the service needs of the participant and if the participant is career-ready based on an assessment of his/her occupational skills, prior work experience, employability, and the participant's needs.

### 4. Coordination with Trade Adjustment Assistance (TAA)

- a. Consistent with guidance issued in TEGL 13-21, LWDBs are to continue serving trade-effective workers from groups certified prior to July 1, 2022. These individuals may also be eligible for Dislocated Workers and co-enrollment requires that the WIOA Dislocated Worker program funds a minimum of one service.

### 5. Coordination with Reemployment Services and Eligibility Assessment (RESEA)

- a. RESEA program participants who are deemed unlikely to return to a previous industry or occupation indicated as declining are also qualified to receive WIOA Dislocated Worker (DW) services.

### 6. Coordination with Partner Programs

- a. Where appropriate for the individual, staff should also determine the benefit of co-enrollment in the Adult Education and Family Literacy Act and the Vocational Rehabilitation programs.

### 7. Coordination with Special Grants

- a. Where appropriate for the individual, staff should also determine the benefit of co-enrollment in special grant programs.

For all participants who are co-enrolled in multiple programs, staff must identify and track the funding streams which pay the costs of services provided to individuals who are participating in programs concurrently and ensure no duplication of services.

## References

- [CareerSource Florida Administrative Policy Number 116: Trade Adjustment Assistance and Workforce Innovation and Opportunity Act Dislocated Worker Co-enrollment](#)
- [CareerSource Florida Policy 2021.12.09.A.1: Comprehensive Employment, Education, and Training Strategy](#)

- [CareerSource Florida Workforce Policy 127: Adult and Dislocated Worker Program Framework and Design](#)
- [WIOA, Public Law 113-128](#)

## History

Date	Action	Description
TBD	Issuance	Initial approval by the CSTB Board of Directors.

## Attachments

- [2025-2028 CareerSource Tampa Bay R28 WIOA Regional and Local Workforce Services Plan](#)
- [CSTB P-W-06-V02 Co-Enrollment of Participants Procedure](#)

## Other Resources



## **Action Item**

### **PY'25/26 FloridaCommerce ICQ & Assessment**

#### **Background:**

In accordance with the FloridaCommerce Grantee/Subgrantee agreement, the Completed Internal Control Questionnaire (ICQ) signed by the Board Chairperson and Executive Director is due by September 30 or within 30 calendar days after the Internal Control Questionnaire is provided to the LWDB, whichever is later. The ICQ is a self-assessment tool to evaluate whether a system of sound internal control exists within the LWDB.

#### ***Makeup of the ICQ***

The ICQ document emphasizes the “17 Principles” of internal controls developed by the Committee of Sponsoring Organizations of the Treadway Commission (COSO) and presented in the Internal Controls – Integrated Framework. The five components of internal controls (Control Environment, Risk Assessment, Control Activities, Information and Communication and Monitoring) are fundamentally the same as the five standards of internal controls and reflect the same concepts the “Standards for Internal Control in the Federal Government” utilizes.

The principles are reflected in groupings of questions related to major areas of control focus (Control Environment, Risk Assessment, Control Activities, Information and Communication and Monitoring) within the organization. Each question represents an element or characteristic of control that is or can be used to promote the assurance that operations are executed as management intended.

#### ***Self-Assessment Rating***

The self-assessment ratings and responses reflect the controls in place or identify areas where additional or compensating controls could be enhanced. Ratings are on a scale of 1 to 5, with “1” indicating the greatest need for improvements in internal controls and “5” indicating that a strong system of internal controls already exists.

#### **Information:**

CSTB reviewed each question and considered the controls in place. Based on CSTB’s self-assessment, a strong system of internal controls is in place and deemed a rating of 4 reflects the level of controls in place for each major area of control focus.

#### **Recommendation:**

Staff recommend approval of the enclosed 2025-2026 Internal Control Questionnaire and Assessment.

# **2025-2026 Internal Control Questionnaire and Assessment**

**Bureau of Financial Monitoring and Accountability  
Florida Department of Commerce**

*September 30, 2025*

**FLORIDACOMMERCE**

107 East Madison Street  
Caldwell Building  
Tallahassee, Florida 32399  
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## OVERVIEW

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### Introduction and Purpose

The Internal Control Questionnaire and Assessment (ICQ) was developed by the Florida Department of Commerce (FloridaCommerce), Bureau of Financial Monitoring and Accountability, as a self-assessment tool to help evaluate whether a system of sound internal control exists within the Local Workforce Development Board (LWDB). An effective system of internal control provides reasonable assurance that management's goals are being properly pursued. Each LWDB's management team sets the tone and has ultimate responsibility for a strong system of internal control.

The self-assessment ratings and responses should reflect the controls in place or identify areas where additional or compensating controls could be enhanced. When the questionnaire and the certification are complete, LWDBs submit them to FloridaCommerce by uploading to SharePoint.

### Definition and Objectives of Internal Control

Internal control is a process, effected by an entity's board of directors, management, and other personnel, designed to provide "reasonable assurance" regarding the achievement of objectives in the following categories:

- Effectiveness and efficiency of operations
- Reliability of financial reporting
- Compliance with applicable laws and regulations

The concept of reasonable assurance implies the internal control system for any entity will offer a reasonable level of assurance that operating objectives can be achieved.

#### ***Need for Internal Control***

Internal control helps to ensure the direction, policies, procedures, and practices designed and approved by management and the governing board are put in place and are functioning as designed/desired. Internal control should be designed to achieve the objectives and adequately safeguard assets from loss or unauthorized use or disposition, and to provide assurance that assets are used solely for authorized purposes in compliance with federal and state laws, regulations, and program compliance requirements. Additionally, Title 2, Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, § 200.303 Internal controls, states:

The recipient and subrecipient must:

- (a) Establish, document, and maintain effective internal control over the Federal award that provides reasonable assurance that the recipient or subrecipient is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the Federal award. These internal controls should align with the guidance in “Standards for Internal Control in the Federal Government” issued by the Comptroller General of the United States or the “Internal Control-Integrated Framework” issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).
- (b) Comply with the U.S. Constitution, Federal statutes, regulations, and the terms and conditions of the Federal award.
- (c) Evaluate and monitor the recipient's or subrecipient's compliance with statutes, regulations, and the terms and conditions of Federal awards.
- (d) Take prompt action when instances of noncompliance are identified.
- (e) Take reasonable cybersecurity and other measures to safeguard information including protected personally identifiable information (PII) and other types of information. This also includes information the Federal agency or pass-through entity designates as sensitive or other information the recipient or subrecipient considers sensitive and is consistent with applicable Federal, State, local, and tribal laws regarding privacy and responsibility over confidentiality.

### ***What Internal Control Cannot Do***

As important as an internal control system is to an organization, an effective system will not guarantee an organization's success. Effective internal control can keep the right people, such as management and the governing board members, informed about the organization's operations and progress toward goals and objectives. However, this control cannot protect against economic downturns or make an understaffed entity operate at full capacity. Internal control can only provide reasonable, but not absolute, assurance the entity's objectives can be met. Due to limitations inherent to all internal control systems, breakdowns in the internal control system may be caused by a simple error or mistake, or by faulty judgments made at any level of management. In addition, control may be circumvented by collusion or by management override. The design of the internal control system is dependent upon the resources available, which means there must be a cost-benefit analysis performed as part of designing the internal control system.

### ***Five Components of Internal Control***

- **Control Environment** – is the set of standards, processes, and structures that provide the basis for carrying out internal control across the organization. The board of directors and senior

management establish the tone at the top regarding the importance of internal control and expected standards of conduct.

- **Risk Assessment** – involves a dynamic and iterative process for identifying and analyzing risks to achieving the entity’s objectives, forming a basis for determining how risks should be managed. Management considers possible changes in the external environment and within its own business model that may impede its ability to achieve objectives.
- **Control Activities** – are the actions established by policies and procedures to help ensure that management directives mitigate risks so the achievement of objectives are carried out. Control activities are performed at all levels of the entity and at various stages within business processes, and over the technology environment.
- **Information and Communication** – are necessary for the entity to carry out internal control responsibilities in support of achieving its objectives. Communication occurs both internally and externally and provides the organization with the information needed to carry out day-to-day internal control activities. Communication enables personnel to understand internal control responsibilities and their importance to the achievement of objectives.
- **Monitoring** – are ongoing evaluations, separate evaluations, or some combination of the two used to ascertain whether the components of internal controls, including controls to affect the principles within each component, are present and functioning. Findings are evaluated and deficiencies are communicated in a timely manner, with serious matters reported to senior management and to the board of directors.

## Makeup of the ICQ

Subsequent sections of this document emphasize the “17 Principles” of internal control developed by the COSO and presented in the Internal Controls – Integrated Framework. The five components of internal control listed above are fundamentally the same as the five standards of internal control and reflect the same concepts as the “Standards for Internal Control in the Federal Government.”

The principles are reflected in groupings of questions related to major areas of control focus within the organization. Each question represents an element or characteristic of control that is or can be used to promote the assurance that operations are executed as management intended.

It should be noted that entities may have adequate internal control even though some or all of the listed characteristics are not present. Entities could have other appropriate internal control operating effectively that are not included here. The entity will need to exercise judgment in determining the most appropriate

and cost-effective internal control in any given environment or circumstance to provide reasonable assurance for compliance with federal program requirements.

## Completing the Questionnaire

On a scale of 1 to 5, with “1” indicating the area of greatest need for improvements in internal control and “5” indicating that a very strong internal control exists, select the number that best describes your current operating environment. Please provide details in the comments/explanations column for each statement with a score of 1 or 2. **For questions requiring a narrative, please provide in the comments/explanations column.**

## Certification of Self-Assessment of Internal Controls

Attachment A includes a certification which should be completed and signed by the LWDB Executive Director, then reviewed, and signed by the LWDB Chair or their designee, and uploaded to SharePoint.

## CONTROL ENVIRONMENT

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					Comments/Explanations
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	
<b>Principle 1. The organization demonstrates a commitment to integrity and ethical values.</b>							
1.	The LWDB's management and board of directors' commitment to integrity and ethical behavior is consistently and effectively communicated throughout the LWDB, both in words and deeds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2.	The LWDB has a code of conduct and/or ethics policy that is periodically updated and has been communicated to all staff, board members, and contracted service providers. <b>Provide the date of the last code of conduct/ethics policy update. How was this update communicated to all staff?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The Code of ethics and Code of conduct is included in the LWDB's employee handbook and currently under review. When updated, communication to all staff is handled through entity wide email correspondence.
3.	When the LWDB hires employees from outside of the organization the person is trained or made aware of the importance of high ethical standards and sound internal control. <b>How is ethics training provided to new staff?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CSTB's EO Office holds an annual training with all staff on how to make an whistle blower complaint and review of code of conduct.
4.	The LWDB management has processes in place to evaluate the performance of staff and contracted service providers against the expected standards of conduct.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>Principle 2. The board of directors demonstrates independence from management and exercises oversight of the development and performance of internal controls.</b>							
5.	The board of directors define, maintain, and periodically evaluate the skills and expertise needed among its members to enable them to question and scrutinize management's activities and present alternate views, and act when faced with obvious or suspected wrongdoing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
6.	The board of directors oversees the LWDB's design, implementation, and operation of the organizational structure so the board of directors can fulfill its responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
7.	The board of directors and/or audit committee maintains a direct line of communication with the LDWB's external auditors and internal monitors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
8.	The board of directors establishes the expectations and evaluates the performance of the chief executive officer or equivalent role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

<b>Principle 3. Management establishes, with LDWB oversight, organizational structure, reporting lines, and appropriate authorities and responsibilities in the pursuit of objectives.</b>							
9.	Management periodically reviews and modifies the organizational structure of the LWDB in light of anticipated changing conditions or revised priorities. <b>Please provide the date of last review.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Review is ongoing, Most recent review was conducted via engagement of a third party March of 2025.
10.	Specific lines of authority and responsibility are established to ensure compliance with federal and state laws and regulations and a proper segregation of duties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
11.	The LWDB management maintains documentation of controls, including changes to controls, to meet operational needs and retain organizational knowledge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>Principle 4. The organization demonstrates a commitment to attract, develop, and retain competent individuals in alignment with objectives.</b>							
12.	The LWDB's recruitment processes are centered on competencies necessary for success in the proposed role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
13.	The LWDB provides training opportunities or continuing education to develop and retain sufficient and competent personnel. Training includes a focus on managing awards in compliance with federal and state statutes, regulations, and the terms and conditions of the award.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
14.	The LWDB has succession plans for senior management positions and contingency plans for assignments of responsibilities important for internal control. <b>Describe the succession and/or contingency planning for senior management positions.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LWDB process begins with identifying critical positions essential for continuity and growth, assessing the talent pool to pinpoint potential successors, and implementing targeted development programs to equip these individuals with the necessary skills and knowledge.
<b>Principle 5. The organization evaluates performance and holds individuals accountable for their internal control responsibilities in the pursuit of objectives.</b>							
15.	Job descriptions include appropriate knowledge and skill requirements for all employees. Components of performance expectations are consistent with federal and state requirements applicable to each position. For all employees, the LWDB regularly evaluates performance and shares the results with the employee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

16.	The LWDB has mechanisms in place to ensure that all required information is timely published to the LWDB's website in a manner easily accessed by the public in compliance with laws, regulations, and provisions of grant agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
17.	The LWDB's management structure and tone at the top helps establish and enforce individual accountability for performance of internal control responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
18.	The LWDB has policies, processes, and controls in place to evaluate performance and promote accountability of contracted service providers (and other business partners) and their internal control responsibilities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## RISK ASSESSMENT

RISK ASSESSMENT		Self-Assessment of Policies, Procedures, and Processes					Comments/Explanations
		Weak		Strong			
		1	2	3	4	5	
Principle 6. The organization defines objectives clearly to enable the identification of risks and define risks tolerances.							
19.	Management establishes a materiality threshold for each of its major objectives and identifies risk at each location where the LWDB conducts activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
20.	Management uses operational objectives as a basis for allocating the resources needed to achieve desired operational and financial performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
21.	The LWDB sets entity-wide financial reporting controls and assesses the risks that those controls will not prevent material misstatements, errors, or omissions in the financial statements. Financial reporting controls are consistent with the requirements of federal awards.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Principle 7. The organization identifies risks to the achievement of its objectives across the organization and analyzes risks as a basis for determining how the risks should be managed.							
22.	Management ensures that risk identification and analysis consider internal and external factors and their potential impact on the achievement of objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## RISK ASSESSMENT

		<i>Self-Assessment of Policies, Procedures, and Processes</i>					
		<i>Weak</i>		<i>Strong</i>			
		1	2	3	4	5	Comments/Explanations
23.	The LWDB adequately and effectively manages risks to the organization and has designed internal controls in order to mitigate the known risks. <b>What new controls, if any, have been implemented since the prior year and which organizational risks do they mitigate?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
24.	The LWDB's risk identification/assessment is broad and includes both internal and external business partners and contracted service providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>Principle 8. The organization considers the potential for fraud in assessing risks to the achievement of objectives.</b>							
25.	The LWDB periodically performs an assessment of each of its operating locations' exposure to fraudulent activity and how the operations could be impacted. <b>When was the last assessment performed on each operating location to identify any fraudulent activity? What is the assessment frequency?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bi-monthly Executive leadership meetings is the forum to discuss and address concerns, if any. In assessing opportunities for fraud, the leadership team reviews potential areas of weakness in internal control, lack of oversight, inadequate segregation of duties, etcetera. Assessment is performed as needed.
26.	The LWDB's assessment of fraud risks considers opportunities for: <ul style="list-style-type: none"> <li>• unauthorized acquisition, use and disposal of assets;</li> <li>• altering accounting and reporting records;</li> <li>• corruption such as bribery or other illegal acts; and</li> <li>• other forms of misconduct, such as waste and abuse.</li> </ul> <b>Provide a narrative of the system/process for safeguarding cash on hand, such as prepaid program items (i.e. gas cards, Visa cards) against unauthorized use/distribution.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The LWDB does not use prepaid cards but reloadable cards. Reloadable cards are unfunded.



Principle 9. The organization identifies, assesses, and responds to changes that could significantly impact the system of internal control.							
27.	The LWDB has mechanisms in place to identify and react to significant changes presented by internal conditions including the LWDB’s programs or activities, oversight structure, organizational structure, personnel, and technology that could affect the achievement of objectives. <b>Describe the mechanisms in place to identify and react to significant changes presented by internal conditions, such as what type of event or condition activates the review mechanism.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	The mechanisms in place includes but is not limited to USDOL/ETA Advisories, TEGLs, FloridaCommerce, CareerSource Florida, and other local, state, and federal bodies. The process to react to significant change includes at the forefront, the executive leadership team and general counsel, as applicable.
28.	The LWDB has mechanisms in place to identify and react to significant changes presented by external conditions including governmental, economic, technological, legal, regulatory, and physical environments that could affect the achievement of objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
29.	Considering significant changes affecting the LWDB, existing controls have been identified and revised to mitigate risks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## CONTROL ACTIVITIES

CONTROL ACTIVITIES		Self-Assessment of Policies, Procedures, and Processes					
		Weak		Strong			Comments/Explanations
		1	2	3	4	5	
Principle 10. The organization selects and develops control activities that contribute to the mitigation of risks to the achievement of objectives to acceptable levels.							
30.	The LWDB has a written business continuity plan which includes contingencies for business processes, assets, human resources, and business partners, and is periodically evaluated and updated to ensure continuity of operations to achieve program objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
31.	Controls employed by the LWDB include authorizations, approvals, comparisons, physical counts, reconciliations, supervisory controls, and ensure allowable use of funds. What type of training is provided to program and administration staff to ensure the allowable use of grant funds?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Internal training conducted by department/program, virtual, in-person, and hybrid training via webinars, online courses, in-person workshops and hybrid utilizing training sponsored by FloridaCommerce (such as Florida's Veterans Workforce Summit) as Industry Training (such as SNAP E&T National Forum). Entity wide staff training periodically through out the year.

Principle 11. The organization selects and develops general control activities over technology to support the achievement of objectives.							
32.	The LWDB periodically (e.g., quarterly, semiannually) reviews system privileges and access controls to the different applications and databases within the IT infrastructure to determine whether system privileges and access controls are appropriate. <b>How frequently (quarterly, semiannually, etc.) are system privileges reviewed?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	LWDB IT and MIS groups review privileges upon hiring and any role changes and also semi-annually. Privileges are assigned to groups and group membership and their associated permissions are also review semi-annually.
33.	Management selects and develops control activities that are designed and implemented to restrict technology access rights to authorized users commensurate with their job responsibilities and to protect the organization's assets from external threats.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
34.	Management has identified the appropriate technology controls that address the risks of using applications hosted by third parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
35.	The LWDB has considered the protection of personally identifiable information (PII), as defined in section 501.171(1)(g)1, F.S., of its employees, participants/clients and vendors, and have designed and implemented policies that mitigate the associated risks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
36.	The LWDB has established organizational processes and procedures to address cybersecurity risks to its critical information infrastructure. (Reference: National Institute of Standards and Technology (NIST) Cybersecurity Framework) <b>What measures are being taken to address the risk of cybersecurity in the organization?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Weekly security awareness training exercises as well as annual assessments and tests. The network systems monitored by third-party to ensure a secure network. Workstations monitored for the latest security patches and fixes. All sites protected by modern firewalls with intrusion protection and defense systems. Multi-factor authentication required to access key systems as well as any remote access. A secure and complicated password policy is in place, requiring periodic password changes as well.

Principle 12. The organization deploys control activities through policies that establish what is expected and procedures that put policies into action.							
37.	The LWDB has policies and procedures addressing proper segregation of duties between the authorization, custody, and recordkeeping for the following tasks, if applicable: Prepaid Program Items (Participant Support Costs), Cash/Receivables, Equipment, Payables/Disbursements, Procurement/Contracting, and Payroll/Human Resources.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
38.	The LWDB has written procedures that minimize the time elapsing between the receipt of advanced funds and disbursement of funds as required by 2 CFR 200.305(b)(1).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
39.	The LWDB has processes to ensure the timely submission of required reporting (i.e., financial reports, performance reports, audit reports, internal monitoring reviews, or timely resolution of audit findings).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
40.	The LWDB has a records retention policy and has implemented internal controls to ensure all records are retained, safeguarded, and accessible, demonstrating compliance with laws, regulations, and provisions of contracts and grant agreements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
41.	LWDB periodically reviews policies, procedures, and related control activities for continued relevance and effectiveness. Changes may occur in personnel, operational processes, information technology, or governmental regulations.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

## INFORMATION AND COMMUNICATION

		Self-Assessment of Policies, Procedures, and Processes					Comments/Explanations
		Weak		Strong			
		1	2	3	4	5	
<b>Principle 13. The organization obtains or generates and uses relevant, quality information to support the functioning of internal control.</b>							
42.	Federal, state, or grant program rules or regulations are reviewed by one or more of the following: governing board, audit, finance, or other type committee. <b>How often are these reviewed?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	As Federal, State or grant program rules or regulations are issued, it is reviewed by the LWDB to determine its impact to policy. New policies are first reviewed by the applicable committee with final approval by the Board. Review is conducted, as needed.
43.	The LWDB considers both internal and external sources of data when identifying relevant information to use in the operation of internal control.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
44.	The LWDB has controls in place to ensure costs are accurately recorded and allocated to the benefiting federal/state fund or grant.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<b>Principle 14. The organization internally communicates quality information, including objectives and responsibilities for internal control, necessary to support the functioning of internal control.</b>							
45.	Communication exists between personnel, management, and the board of directors so that quality information is obtained to help management achieve the LWDB's objectives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
46.	There is a process to quickly disseminate critical information throughout the LWDB when necessary. <b>Provide a description of the dissemination process.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1) Emergency Communication mailbox. (2) Phone Tree (3) Intranet site (4) Emergency Hotline (5) Teams and (6) Paylocity
47.	Management has a process for the development, approval and implementation of policy updates and communicates those updates to staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Principle 15. The organization communicates with external parties regarding matters affecting the functioning of internal controls.						
48.	The LWDB has a means for anyone to report suspected improprieties regarding fraud; errors in financial reporting, procurement, and contracting; improper use or disposition of equipment; and misrepresentation or false statements. <b>Describe the process of how someone could report improprieties. Who receives/processes/investigates, etc.?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
49.	The LWDB has processes in place to communicate relevant and timely information to external parties.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
50.	The LWDB has processes in place to communicate the results of reports provided by the following external parties: Independent Auditor, FloridaCommerce Bureau of Financial Monitoring and Accountability, FloridaCommerce Bureau of One-Stop and Program Support, FloridaCommerce Office of Inspector General, Florida Auditor General, and federal awarding agencies (U.S. Department of Labor, U.S. Department of Health and Human Services, and U.S. Department of Agriculture to the Board of Directors).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## MONITORING ACTIVITIES

MONITORING ACTIVITIES						Self-Assessment of Policies, Procedures, and Processes					
						Weak		Strong			Comments/Explanations
						1	2	3	4	5	
Principle 16. The organization selects, develops, and performs ongoing and/or separate evaluations to ascertain whether the components of internal controls are present and functioning.											
51.	The LWDB periodically evaluates its business processes such as cash management, comparison of budget to actual results, repayment or reprogramming of interest earnings, draw down of funds, procurement, and contracting activities. Describe the process of how funding decisions are determined. What are the criteria, who initiates/approves, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Equal Employment Opportunity (EEO) officer as well as HR department to report improprieties, and ethics hotline. In addition, the employee handbook includes a whistleblower policy.				

## MONITORING ACTIVITIES

		Self-Assessment of Policies, Procedures, and Processes					Comments/Explanations
		Weak		Strong			
		1	2	3	4	5	
52.	The LWDB considers the level of staffing, training and skills of people performing the monitoring given the environment and monitoring activities which include observations, inquiries, and inspection of source documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
53.	LWDB management periodically visits all career center locations in its local area (including subrecipients) to ensure the policies and procedures are being followed and functioning as intended. <b>When was the most recent visit performed, by whom, and who were the results communicated to?</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Internal monitoring is conducted throughout the year to ensure compliance with programmatic requirements by the LWDB's quality assurance monitoring team.
<b>Principle 17. The organization evaluates and communicates internal control deficiencies in a timely manner to those parties responsible for taking corrective action, including senior management and the board of directors, as appropriate.</b>							
54.	The LWDB management takes adequate and timely actions to correct deficiencies identified by the external auditors, financial and programmatic monitoring, or internal reviews.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
55.	The LWDB monitors all subrecipients to ensure that federal funds provided are expended only for allowable activities, goods, and services and communicates the monitoring results to the board of directors. <b>Are subrecipient monitoring activities outsourced to a third party? If so, provide the name of the party that performs the subrecipient monitoring activities.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Monitoring is conducted in house

## ATTACHMENT A

### Florida Department of Commerce Certification of Self-Assessment of Internal Controls

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Local Workforce Development Board Number: 28

**To be completed by the Executive Director:**

A self-assessment of internal control has been conducted for the 2025-2026 fiscal monitoring period. As part of this self-assessment, the Internal Control Questionnaire developed by the Florida Department of Commerce has been completed and is available for review.

Signature: \_\_\_\_\_

Printed Name: Keidrian Kunkel

Title: President and CEO

Date: \_\_\_\_\_

**To be completed by the Board Chairperson or their designee:**

I have reviewed the self-assessment of internal control that was conducted for the 2025-2026 fiscal monitoring period.

Signature: \_\_\_\_\_

Printed Name: Barclay Harless

Title: Board Chair

Date: \_\_\_\_\_

Please scan and upload to SharePoint an executed copy of this certification on or before **October 31, 2025**.



## **Action Item**

### **Ex-Offender/Returning Citizen Workforce Training Program Agreement**

#### **Background**

Since April 1, 2023, CareerSource Tampa Bay has successfully administered the Ex-Offender/Returning Citizen Workforce Training Program (the Program). Therefore, the Hillsborough Board of County Commissioners believes (1) it to be in the public interest for the LWDB to continue to provide operational and support services for an ex-offender/returning citizen workforce training and job placement services program for the residents of Hillsborough County who are desirous of such services; and (2) enter into an Agreement with the LWDB to provide said services.

The LWDB has partnered with Abe Brown Ministries for the provision of Ex-Offender/Re-entry Services to implement the Career Advancement and Reintegration Education (CARE) program. The CARE collaboration provides local investment that strengthens our ability as a community to provide interventions that stabilize the lives of returning citizens so that they can focus on sobriety, good health, training, employment, personal growth, and self-sufficiency. The CARE program has impactful outcomes that show strong employment outcomes, retention, and wage impact for participants.

#### **Key outcomes:**

- 86 Enrollments in the Program. (Total Grant)
- 216 individuals received an overview of services offered by the LWDB and were enrolled in the Wagner-Peyser universal program. (Total Grant)
- 73% Successful completion rate of professional development 6-week course. (September 2024 – October 30, 2025)
- The average employment wage for participants was \$16.34 per hour. (September 2024 – October 30, 2025)
- Of the 41 candidates enrolled, September 2024 – October 2025 CARE program had a less than 10% recidivism rate.

#### **Information**

The Agreement shall be effective upon execution by both parties and shall cover services provided from October 1, 2025, until September 30, 2026, in an amount not to exceed \$112,500. Under this Agreement, the LWDB will continue to provide program management and administrative services and, partner with a qualified community-based organization(s) who currently serves this population to identify and provide program participants services such as housing, healthcare, employment assistance, food stability, and education, work readiness and employability skills training and preparation to return to work and link the individual to gainful full-time employment.

The Agency will enroll at least twenty-five (25) participants during the term of the Agreement in the CARE (Career Advancement and Reintegration Education) program

**Recommendation:** Staff recommends approval of the Ex-Offender/Returning Citizen Workforce Training Program Agreement.



**AGREEMENT  
BY AND BETWEEN  
HILLSBOROUGH COUNTY,  
AND  
TAMPA BAY WORKFORCE ALLIANCE, INC.,  
D/B/A CAREERSOURCE TAMPA BAY**

**THIS AGREEMENT** (“Agreement”) is entered into by and between **HILLSBOROUGH COUNTY**, a political subdivision of the State of Florida, located at 601 E. Kennedy Boulevard, Tampa, Florida 33602 (“County”) and **TAMPA BAY WORKFORCE ALLIANCE, INC.**, d/b/a CareerSource Tampa Bay, a Florida non-profit Corporation, headquartered at 4350 West Cypress Street, Suite 875, Tampa, FL 33607, (“Agency”).

**RECITALS**

**WHEREAS**, the County believes it to be in the public interest to provide operational and support services for an ex-offender/returning citizen workforce training and job placement services program through the Agency for the residents of Hillsborough County who are desirous of such services; and

**WHEREAS**, the ex-offender/returning citizen workforce training and job placement services program raises interest in and awareness of employment opportunities in Hillsborough County and prepares participants for employment; and

**WHEREAS**, the County has examined the services and/or facilities of the Agency, and has determined that the Agency provides the facilities and/or services needed by the ex-offender/returning citizen residents of Hillsborough County; and

**WHEREAS**, the County has determined that the best interests of its citizens will be served by entering into an Agreement with the Agency for the furnishing of services and/or facilities provided by the Agency.

**NOW, THEREFORE**, in consideration of the mutual covenants, promises and representations contained herein and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the County and the Agency agree as follows:

**ARTICLE 1  
Recitals**

The aforesaid recitals are true and correct and are incorporated herein by reference.

**ARTICLE 2  
Scope of Service**

The Agency shall provide the services described in Exhibit “A”, Scope of Services, attached hereto and incorporated herein by reference.

**ARTICLE 3**  
**Term of Agreement**

This Agreement shall be effective upon execution by both parties and shall cover services provided from October 1, 2025, until September 30, 2026 (“Term”), unless sooner terminated in accordance with this Agreement.

**ARTICLE 4**  
**Consideration and Payment**

For its performance under this Agreement as described in Exhibit “A” and other applicable terms under this Agreement, the Agency will receive funds from the County, on a reimbursement basis, in an amount not to exceed One Hundred Twelve Thousand Five Hundred Dollars (\$112,500) for the Term.

Payments will be made in accordance with the procedures specified in Exhibit “B”, Method of Payment, and Exhibit “C”, Request for Payment Form, both of which are attached hereto and incorporated herein by reference. The Agency shall submit program performance report(s) in accordance with Exhibit “D”, Program Performance Report, attached hereto and incorporated herein by reference, with all payment requests.

The source of funding for this Agreement is the County's General Operating Funds and does not include any State or Federal funds.

**ARTICLE 5**  
**Payment and Reporting Requirements**

Expenditure and Payment of funds shall be made in accordance with the Method of Payment as identified in Exhibit “B”, attached hereto and incorporated herein, and Exhibit “C”, attached hereto and incorporated herein. County shall review and approve the Agency’s Method of Payment submission for conformance with this Agreement. The County shall not reimburse the Agency for unallowable expenses.

If the Agency fails to perform any obligation hereunder, County may withhold or adjust the amount of payments due under the Agreement until all obligations are met. The total amount of funding available may also be adjusted as a result of reductions in the level of funding available to the County, and as a result of programmatic changes and budgetary revisions agreed to by the parties. If the Agency fails to provide the services required to be performed under this Agreement, all rights to payment are forfeited.

The County may not honor a late request for payment and will not be liable for non-payment of a late request. The Agency shall submit its final Request for Payment Form, Program Performance Report Form, attached hereto as Exhibit “D” and incorporated herein, and any other required reports within 30 days of the termination or expiration of this Agreement. The County agrees to be bound by the applicable provisions of the Florida Prompt Payment Act, Florida Statutes Sections 218.70., et seq., in connection with this Agreement.

**ARTICLE 6**  
**Maintenance and Review of Records**

The Agency and its subcontractors providing any of the services required to be performed or provided under this Agreement shall maintain adequate records and accounts, including but not limited to property, personnel and financial records, and supporting documentation to assure a proper accounting of all funds received in connection with this Agreement for a period of three (3) years from the date of final payment of such funds to the Agency, or the termination of this Agreement, whichever occurs later, or such longer period as required by law. (Such three-year or longer period is hereinafter referred to as the "Audit Period"). The County and its authorized agents shall have the right, and the Agency, and its subcontractors, as applicable, will permit the County and its authorized agents, including but not limited to, the County Internal Auditor, to examine all such records, accounts and documentation and to make copies thereof, and excerpts or transcriptions therefrom, and to audit all contracts, invoices, materials, accounts and records relating to all matters covered by this Agreement, including but not limited to personnel and employment records during the Audit Period. All such records, accounts and documentation shall be made available to the County and its authorized agents for audit, examination or copying purposes at any time during normal business hours and as often as the County may deem necessary during the Audit Period. The County's right to examine, copy and audit shall pertain likewise to any audits made by any other agency, whether local, state or federal. The Agency shall insure that any such subcontractor shall recognize the County's right to examine, inspect and audit its records, accounts and documentation in connection with its provision of services required to be provided by the Agency under this Agreement. If an audit is begun by the County or other agency, whether local, state or federal, during the Audit Period, but is not completed by the end of the Audit Period, the Audit Period shall be extended until audit findings are issued. This Article 6 shall survive the expiration or earlier termination of this Agreement.

**ARTICLE 7**  
**Financial Reports and Program Reporting Requirements**

The Agency shall submit to the County within one hundred and eighty (180) days after the end of the Agency's fiscal year, and otherwise upon request by the County, audited financial statements, which must comply with Generally Accepted Accounting Principles (GAAP), covering the entire Term of this Agreement. If the Agency fails to provide its audited financial statements within the 180-day time period referenced above, then, the Agency shall be in default of the Agreement. Notwithstanding the foregoing, the County may grant the Agency an extension of the 180-day time period to provide its audited financials, but such extension shall be solely at the County's discretion.

**ARTICLE 8**  
**Legally Required Statement and Provisions Regarding Access to Records**

The Parties acknowledge and agree that the statement and provisions below are required by Florida Statute to be included in this contract for services. The inclusion of this statement and provisions below shall not be construed to imply that the Agency has been delegated any governmental decision-making authority, governmental responsibility or governmental function or that the

Agency is acting on behalf of the County as provided under section 119.011(2), Florida Statutes, or that the statement or provisions are otherwise applicable to the CSHP. As stated below, the Agency may contact the County's Custodian of Public Records with questions regarding the application of the Public Records Law; however, the Agency is advised to seek independent legal counsel as to its legal obligations. The County cannot provide the Agency advice regarding its legal rights or obligations.

**IF THE AGENCY HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE AGENCY'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:**

- i) **813-273-3684**
- ii) **PetrovicJ@HCFL.gov**
- iii) **Jaksa Petrovic, Director, Economic Development Department  
601 E Kennedy Blvd, 20th Floor, Tampa, Florida 33602**

If under this Agreement, the Agency is providing services and is acting on behalf of the County as provided under section 119.011(2), Florida Statutes, the Agency will comply with public records law, and agrees to:

- i) Keep and maintain public records required by the County to perform the services.
- ii) Upon request from the County's custodian of public records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 Florida Statutes or as otherwise provided by law.
- iii) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Agreement term and following completion of the Contract if the Agency does not transfer the records to the County.
- iv) Upon completion of the Agreement, transfer at no cost to the County, all public records in possession of the County or keep and maintain public records required by the County to perform the service. If the Agency transfers all public records to the County upon completion of the Contract, the Agency shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Agency keeps and maintains public records upon completion of the Contract, the Agency shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from the County's custodian of public records, in a format

that is compatible with the information technology systems of the County.

Failure of the Agency to comply with Chapter 119, Florida Statutes, and/or the provisions set forth above, where applicable, shall be grounds for immediate unilateral termination of this Contract by the County.

## **ARTICLE 9**

### **Indemnification**

To the extent not otherwise limited by applicable law, the Agency shall indemnify, hold harmless, and defend the County and the Hillsborough County Board of County Commissioners (“BOCC”), and the respective agents and employees of the County (all of the foregoing shall hereinafter collectively be referred to as the “Indemnified Parties”) from and against any and all liabilities, losses, claims, damages, demands, expenses or actions, either at law or in equity, including court costs and attorneys' fees at the trial and all appellate levels, that may hereafter at any time be made or brought by anyone on account of personal injury, property damage, loss of monies, or other loss, allegedly caused or incurred, in whole or in part, as a result of any negligent, wrongful, or intentional act or omission, or based on any act of fraud or defalcation by the Agency, its agents, subcontractors, assigns, heirs, and employees during performance under this Agreement. The extent of this indemnification shall not be limited in any way as to the amount or types of damages or compensation payable to any of the Indemnified Parties on account of any insurance limits contained in any insurance policy procured or provided in connection with this Agreement. In any and all claims against any of the Indemnified Parties by any employee of the Agency, any subcontractor, heir, assign, or anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, the indemnification obligation under this paragraph shall not be limited in any way as to the amount or type of damages, compensation or benefits payable by or for the Agency or any subcontractor under workers' compensation acts, disability benefit acts or other employee benefit acts. Nothing herein shall be construed to extend any party's liability beyond that provided for in Section 768.28, Florida Statutes. The provisions of this Article shall survive the expiration or termination of this Agreement.

## **ARTICLE 10**

### **Equal Opportunity: Non-Discrimination Clause**

The Agency shall comply with the requirements of all applicable federal, state and local laws prohibiting discrimination and the rules, regulations, policies, and executive orders promulgated thereunder, all of which are incorporated herein by reference.

## **ARTICLE 11**

### **Political Endorsement Prohibition**

Pursuant to BOCC Policy No. 02.12.00.00, the Agency shall not engage, participate or intervene in any form of political activities or campaign on behalf of, or in opposition to, any candidate for public office.

**ARTICLE 12**  
**Conflict of Interest**

The Agency represents that it presently has no interest, and shall acquire no such interest, financial or otherwise, direct or indirect, nor engage in any business transaction or professional activity, or incur any obligation of any nature which would impede or conflict in any manner with the performance of the scope of service required hereunder.

The Agency warrants to the County that no gifts or gratuities have been or will be given to any County employee or agent, either directly or indirectly, in order to obtain this Agreement.

**ARTICLE 13**  
**Compliance With Applicable Laws**

The Agency shall comply with the requirements of all applicable federal, state and local laws and the rules, regulations, policies and executive orders promulgated thereunder, all of which are incorporated herein by reference.

**ARTICLE 14**  
**Drug Free Workplace**

The Agency shall administer, in good faith, a policy designed to ensure that the Agency is free from the illegal use, possession, or distribution of drugs or alcohol.

**ARTICLE 15**  
**Public Entity Crimes**

The Agency hereby represents and warrants that it has not been convicted of a public entity crime and that it is not on the State of Florida's convicted vendor list. The Agency also represents that it is not prohibited from entering into this Agreement by Section 287.133, Florida Statutes.

**ARTICLE 16**  
**Termination of Agreement**

In addition to the exercise of any other remedies available to it at law or in equity, the County, through the County Administrator or his designee, may terminate this Agreement for the Agency's non-performance, as solely determined by the County Administrator or his designee, upon no less than twenty-four (24) hours written notice to the Agency.

Either party to this Agreement may terminate this Agreement without cause upon thirty (30) days prior written notice to the other party. In the event of termination by the County hereunder, the Agency shall not incur any new obligations after notification of the effective date of termination. The County shall pay the Agency for services incurred by the Agency prior to termination. Any costs incurred by the Agency after the effective date of the termination will not be reimbursed.

## **ARTICLE 17**

### **Headings**

Article headings have been included in this Agreement solely for the purpose of convenience and shall not affect the interpretation of any of the terms of the Agreement.

## **ARTICLE 18**

### **Waiver**

A waiver of any performance or default by either party shall not be construed to be a continuing waiver of other defaults or non-performance of the same provision or operate as a waiver of any subsequent default or non-performance of any of the terms, covenants, and conditions of this Agreement. The payment or acceptance of fees for any period after a default shall not be deemed a waiver of any right or acceptance of defective performance.

## **ARTICLE 19**

### **Additional Rights and Remedies**

Nothing contained herein shall be construed as a limitation on such other rights and remedies available to the parties under law or in equity which may now or in the future be applicable.

## **ARTICLE 20**

### **Order of Precedence**

In the event of any conflict between the provisions of this Agreement and the Exhibits, then the provisions of the Agreement shall take precedence over the provisions of the Exhibits.

## **ARTICLE 21**

### **Governing Laws; Venue**

This Agreement shall be governed by the laws, rules, and regulations of the State of Florida, and venue shall be in Hillsborough County, Florida.

## **ARTICLE 22**

### **Severability**

In the event any section, sentence, clause, or provision of this Agreement is held to be invalid, illegal or unenforceable by a court having jurisdiction over the matter, the remainder of the Agreement shall not be affected by such determination and shall remain in full force and effect.

## **ARTICLE 23**

### **Survivability**

Any term, condition, covenant or obligation which requires performance by either party subsequent to termination of this Agreement shall remain enforceable against such party subsequent to such termination.

**ARTICLE 24**  
**Third Party Beneficiaries/Independent Contractor**

This Agreement is for the benefit of the County and the Agency. No third party is an intended beneficiary so as to entitle that person to sue for an alleged breach of this Agreement. Agency acknowledges and agrees that it is acting as an independent contractor in performing its obligations hereunder and not as an agent, officer or employee of the County.

**ARTICLE 25**  
**Modifications**

This writing embodies the entire Agreement and understanding between the parties hereto and there are no other agreements and/or understandings, oral or written, with respect to the subject matter hereof, that are not merged herein and superseded hereby. This Agreement only may be amended or extended by a written instrument executed by the County and the Agency expressly for that purpose.

**ARTICLE 26**  
**Assignment**

This Agreement may not be assigned or subcontracted in whole or in part without the prior written consent of the County.

**ARTICLE 27**  
**Notices**

All notices required or permitted to be given by a party under this Agreement shall be in writing and be sent to the other party by United States certified mail, return receipt requested, overnight delivery service or personal delivery with signature verification, and shall be addressed as follows:

**A. COUNTY:**

Jaksa Petrovic, Director  
Economic Development

*To the following address for U.S. mail:*

Post Office Box 1110  
County Center – 20<sup>th</sup> Floor  
Economic Prosperity  
Tampa, Florida 33601 – 1100

*And to the following address for overnight  
delivery service, certified mail or personal delivery:*

County Center – 20<sup>th</sup> Floor  
Economic Development Department  
601 E. Kennedy Boulevard  
Tampa, Florida 33602



**B. AGENCY**

Ms. Keidrian Kunkel, President & CEO  
CareerSource Tampa Bay  
4350 West Cypress Street, Suite 875  
Tampa, FL 33607  
Telephone: (813) 397-2024  
Email: kunkelk@careersourcetb.com

Any notice sent in accordance with this Article shall be deemed given two (2) days after deposit in the U.S. Mail, if sent by certified mail, return receipt requested, overnight delivery service or personal delivery. The act of refusal by a party of delivery of a notice sent in accordance with this Article shall be deemed acceptance of such notice by such party. Either party may change its notice address at any time by providing to the other party a notice of that change sent in conformance with the requirements of this Article 27.

**ARTICLE 28****Fiscal Non-Funding Clause**

This Agreement is subject to funding availability. In the event sufficient budget funds to fund this Agreement become reduced or unavailable, the County shall notify the Agency of such occurrence, and the County may terminate this Agreement, without penalty or expense to the County, upon no less than twenty-four (24) hours written notice to the Agency. The County shall be the final authority as to the availability of funds and how available funds will be allotted. If this Agreement is funded in whole or in part by Federal or state dollars which are reduced or become unavailable, the County shall notify the Agency of such occurrence and the County may terminate this Agreement, without penalty or expense to the County, upon no less than twenty-four (24) hours written notice to the Agency.

**ARTICLE 29****Project Publicity**

Pursuant to the BOCC Policy No. 10.04.00.00, any news release or other type of publicity pertaining to the services performed by the Agency pursuant to this Agreement must recognize the contribution of the County. The Agency being a not-for-profit corporation receiving public funding or non-monetary contributions through the County shall recognize the County for its contribution in all promotional materials and at any event or workshop for which County funds are allocated. Any news release or other type of publicity must identify the County/BOCC as a funding source. In written materials, the reference to the County must appear in the same size letters and font type as the name of any other funding sources.

**ARTICLE 30****Electronic Signatures Authorized**

The parties agree that this Agreement and all documents associated with the transaction contemplated herein may be executed by electronic signature in a manner that complies with

Chapter 668, Florida Statutes, and as approved by the Hillsborough County Board of County Commissioners in Resolution R15-025 on February 4, 2015.

**ARTICLE 31**  
**E-Verify Requirement**

To comply with Executive Order 12989 (as amended, the State of Florida Executive Order No. 11-116 and Section 448.095(2), Fla. Stat., the Agency agrees to utilize the U.S. Department of Homeland Security's E-Verify System (<https://e-verify.uscis.gov/emp>) to verify the employment eligibility status of all new employees hired by the Agency during the term of the Agreement. If the Agency enters into a contract with a subcontractor for the services to be provided hereunder, the subcontractor must provide the Agency with an affidavit stating that the subcontractor does not employ, contract with or subcontract with an unauthorized alien, a copy of which affidavit(s) shall be maintained by the Agency for the duration of the Agreement or longer as provided in Article 6.

**ARTICLE 32**  
**Restriction on Funding for Identification**

Awardee is prohibited from using any funds paid by the COUNTY under this Agreement to provide funds to any person, entity, or organization to issue or secure identification documents to or for any individual who does not provide proof of lawful presence in the United States.

**ARTICLE 33**  
**Prohibition Against Economic Incentives for Foreign Entities**

Pursuant to Section 288.0071, F.S, as a condition of this Agreement, the Agency is required to provide an executed affidavit (in the form attached hereto as Exhibit E) signed under penalty of perjury verifying that the Agency is not a foreign entity or a foreign country of concern such as the People's Republic of China, the Russian Federation, the Islamic Republic of Iran, the Democratic People's Republic of Korea, the Republic of Cuba, the Venezuelan regime of Nicolas Maduro or the Syrian Arab Republic with whom the County is prohibited from contracting with under Florida law.

**ARTICLE 34**  
**Entire Agreement**

The foregoing constitutes the entire Agreement between the parties with respect to the subject matter contained herein.



## ACKNOWLEDGMENT OF AGREEMENT

STATE OF FLORIDA  
COUNTY OF HILLSBOROUGH

The foregoing instrument was acknowledged before me by means of ☐ physical presence or ☐ online  
notarization this \_\_\_\_\_ day of \_\_\_\_\_, 202\_, by \_\_\_\_\_  
Name and Title of Officer or Agent  
of \_\_\_\_\_, a \_\_\_\_\_ corporation on behalf of the Corporation.  
(Name of Corporation/Grantee) (State of Incorporation)  
He/she is personally known to me or has produced: \_\_\_\_\_.  
(Type of Identification)

\_\_\_\_\_  
Signature of Notary

\_\_\_\_\_  
Name of Notary Typed, Printed or Stamped

\_\_\_\_\_  
Title or Rank

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Commission Expiration Date)

## EXHIBIT A SCOPE OF WORK

AGENCY: CareerSource Tampa Bay

PROGRAM: Ex-Offender/Returning Citizen Workforce Training Program

**PRIMARY GOAL:** To provide the delivery of workforce training and placement services to Hillsborough County ex-offenders/returning citizens to develop a pipeline of talent with foundational employability skills and aptitude to obtain employment. These citizens may not have sufficient levels of workforce skills or experience to competitively re-enter the workforce in today's economy. The Program will introduce participants to the skills and traits necessary to improve their employability and raise their interest in and awareness of career opportunities within Hillsborough County, as well as engage employers in providing employment opportunities for ex-offenders/returning citizens.

Management and administration for program delivery shall include, but not be limited to, overseeing staff and day-to-day operations, serving as the first point of contact for Program participants, negotiation of contracts related to Program implementation, providing centralized operations and procedures for delivery of services, and submitting reimbursement requests and performance reports. More specifically, the costs associated with direct and indirect staff shall include, but not be limited to: Finance staff to process invoices, manage budget and forecasting, reporting requirements; and Program and Contract staff to recruit participants, enroll in services, facilitate documentation for eligibility, enrollment, participant management.

The Agency will connect Program participants to employment assistance services, which includes but is not limited to, work readiness and employability skills training; financial literacy supports; career pathway guidance and skill development resources; including digital literacy and internet access supports; placement services; mentoring; and enrollment into the Employ Florida online employment assistance system. Employ Florida is the Agency's online tool specifically designed to help connect employers and job seekers and is another tool of their network of workforce services and resources. Enrolled participants will be able to search for a job and apply online, post a resume, research labor market information and trends, and find information on employers that may be of interest to them.

### PART I – Scope of Services

The Agency shall provide the following approved Scope of Services on which the County funding is based.

The Agency will provide the following deliverables:

- 1) Ex-Offender/Returning Citizens CARE Program Training** **Up to \$112,500**  
The Agency will deliver a workforce training and job placement services program (Program) for Hillsborough County ex-offenders/returning citizens to develop a pipeline of talent with foundational employability skills and aptitude to obtain employment. The

Program will serve as a resource for ex-offenders/returning citizens to increase their employability by providing them training, resources, tools, and support services to overcome barriers to employment and successfully transition into employment. Eligible Program participants are exempt from the age requirements established for the Apprenticeship to Career Empowerment (ACE) Program, should they participate in that program.

The Program will be supported in partnership with qualified community-based organizations currently serving this population which will help identify candidates, facilitate training, and engage corporate and private sector employers to participate. Critical outcomes of the Program include providing participants with opportunities for occupational skills training, job placement with a local employer, and industry-recognized certifications, where appropriate.

A “Unit of Service” is defined as one (1) month of Program administration and delivery by the Agency. The Unit of Service rate of pay is Nine Thousand Three Hundred Seventy-Five Dollars (\$9,375) during the Term. The not-to-exceed total amount is One Hundred Twelve Thousand Five Hundred Dollars (\$112,500) during the Term.

The Agency will enroll at least twenty-five (25) participants during the term of the Agreement in the CARE (Career Advancement and Reintegration Education) program.

## PART II – Total Consideration

For its performance under this Agreement, the Agency will receive funds from the County, on a reimbursement basis not-to-exceed One Hundred Twelve Thousand Five Hundred Dollars (\$112,500) during the Term. Notwithstanding the foregoing, if the Agency fails to submit proper Request for Payment forms up to \$112,500 for the Term of this Agreement, then, any remaining portions thereof which the County has not disbursed to the Agency shall not be available for reimbursement.

If the County determines, through its inspection or review, that the Agency has performed, or is performing fewer than the total agreed upon Units of Service, the total consideration paid to the Agency shall be subject to a pro-rata reduction.

The Agency shall maintain the necessary back-up information to document the delivery of the services. An Exhibit D, Program Performance Report form, attached hereto and incorporated herein, shall be submitted with each Exhibit C, Request for Payment form, attached hereto and incorporated herein. The Exhibit D, Program Performance Report form, must provide the project details for each period to document the progress in delivering the services and include: list of participants served and services provided, participants home address, participants employment status, participants Employ Florida enrollment status, training provider name and address (if applicable), employer name and address (if applicable), supporting documentation (certificates of completion, etc.), and immediate outcomes when possible. Since there may be a lag in compiling information for each Program Performance Report, the latest available data for each reporting

period will be acceptable during the Term.

The County reserves the right to request any additional documentation necessary to document the residency of participants in the Agency's programs for which payment is being sought.

A Final Program Performance Report is due within thirty (30) days after the end of the Term, or termination, of this Agreement, outlining the Agency's efforts, accomplishments, deliverables, benchmarks, performance measures and results covering the Term.

The County shall reimburse the Agency for the amount set forth in the proper Request for Payment Form up to the Unit Rate. If the invoiced amount is more than the Unit Rate and is supported by the appropriate documentation and the Agency has not been reimbursed for the entire Unit Rate in a previous period, the County shall reimburse the Agency for the amount that is set forth in the proper Request for Payment Form up to the amount that is reimbursable for the current Unit Rate and any unreimbursed amount for the Unit Rate in previous periods.

In addition to the BOCC Policy No. 10.04.00.00, that any news release or other type of publicity pertaining to the services performed by the Agency pursuant to this Agreement must recognize the contribution of the BOCC, any project announcement or publicity event resulting from efforts of the Agency, will be planned in cooperation with the County's Economic Development and Communications Departments for purposes of coordinating County's official County protocol and public recognition. Prior notification to these two Departments for such events will be no less than fifteen (15) working days whenever possible.

Although, not required in this Agreement, the County would be interested in any customer satisfaction surveys or information regarding the delivery of services funded by this Agreement which helps in identifying best practices or improving the services.

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## **EXHIBIT B METHOD OF PAYMENT**

AGENCY: CareerSource Tampa Bay

PROGRAM: Ex-Offender/Returning Citizen Workforce Training Program

Funding in accordance with agreed to amounts will be made upon receipt of a completed Request for Payment Form, Exhibit “C”, and Program Performance Report, Exhibit “D”. No modifications to the budget shall be funded unless prior written approval has been granted by the County Administrator, or designee. In no event, however, shall payments to the organization exceed \$112,500. However, all funding under this Agreement is subject to availability and the amount may be reduced. The County shall be the final authority as to the availability of funds and how available funds will be allotted. A current certificate of insurance is required before payment. Individual participant files are to be available for on-site review.

Reimbursement requests may be submitted on a monthly or quarterly basis with proper backup. Reimbursement requests shall not be submitted for a period less than one month. If the County determines, through its inspection or review, that the Agency has performed, or is performing less than the total agreed upon services, payments to the Agency shall be subject to a pro-rata reduction. Performance will be measured by units, if applicable, or on a percentage of primary service goals completed. Payment of the reimbursement request shall be made within fifteen (15) business days after approval of such request by the County.

The County’s Fiscal Year commences on October 1<sup>st</sup> and ends on September 30<sup>th</sup> of the following calendar year. Invoices with supporting documentation for services delivered between October 1<sup>st</sup> and September 30<sup>th</sup> must be received no later than September 30<sup>th</sup> of each year to allow closeout of the County’s Fiscal Year.

No County funds will be expended for the Agency’s purchase of equipment, food, beverages or entertainment costs, business memberships or for any event or client services conducted outside of Hillsborough County.

With each request for payment the Agency will provide a Program Performance Report that shall include the project detail report, the list of participants served, participants home addresses, employer name and address, and other information identified in the agreed upon Scope of Services, detailed in Exhibit “A”.

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**EXHIBIT C**  
**REQUEST FOR PAYMENT FORM**  
**HILLSBOROUGH COUNTY ECONOMIC DEVELOPMENT DEPARTMENT**  
**P.O. BOX 1110, TAMPA, FLORIDA 33601**  
**(813) 272-6212**

AGENCY: CareerSource Tampa Bay

PROGRAM: Ex-Offender/Returning Citizen Workforce Training Program

REQUEST NUMBER: \_\_\_\_\_ MONTH: \_\_\_\_\_ AMOUNT: \$ \_\_\_\_\_

***FINANCIAL STATUS REPORT***

BUDGET CATEGORIES	TOTAL APPROVED BUDGET	EXPENDITURES		REMAINING BALANCE
		CURRENT REQUEST	YTD REQUESTS	
Ex-Offender/Returning Citizen Training (\$9,375 for months 1-12) and (including at least 25 CARE participants)	\$112,500			
<b>TOTAL</b>	<b>\$112,500</b>			

I certify that the service covered by this request have been provided to the County in accordance with the terms and conditions of the Agreement and that the documentation provided in the attached Program Performance Report is true, accurate, and complete.

_____ Authorized Agency Signature	_____ Title	_____ Date
--------------------------------------	----------------	---------------

**FOR COUNTY USE ONLY**

ACCT CODE: \_\_\_\_\_ SUPPLIER: \_\_\_\_\_

P.O. #: \_\_\_\_\_ APPROVED: \_\_\_\_\_

I verify that Hillsborough County (based upon certification of Agency Official) has received the goods and/or services.

TYPE OF REVIEW	APPROVED	DATE
FISCAL		
PROGRAMMATIC		
DIRECTOR		

COMMENTS: Payment of the reimbursement request shall be made within fifteen (15) business days after approval of such request by the County.

**EXHIBIT D**  
**PROGRAM PERFORMANCE REPORT**

AGENCY: CareerSource Tampa Bay

PROGRAM: Ex-Offender/Returning Citizen Workforce Training Program

REPORT PERIOD: \_\_\_\_\_ THROUGH \_\_\_\_\_

PERCENTAGE OF AGREEMENT COMPLETED: \_\_\_\_\_%

I. ACCOMPLISHMENTS:

II. PROBLEMS:

III. STATUS REPORT ON PROVISION OF SERVICES: (include report period and year-to-date)

Units of Service Provided	Program Goal	Report Period	Year to Date	% of Goal Completed
Ex-Offender/Returning Citizen Training	12			
CARE Participants	25			

IV. OTHER COMMENTS:

SUPPORTING ATTACHMENTS: See Exhibit A, Scope of Service, for detailed deliverables, benchmarks and performance measures to be part of each Performance Report. The COUNTY reserves the right to request any additional documentation necessary to document the residency of participants in the AGENCY's programs for which payment is being sought.

A Final Program Performance Report is due within thirty (30) days after the end of the Term, or termination, of this Agreement, outlining the AGENCY'S efforts, accomplishments, deliverables, benchmarks, performance measures and results covering the entire Term.

## **INSTRUCTIONS FOR PROGRAM PERFORMANCE REPORT**

THE PURPOSE OF THIS REPORT IS TO PRESENT A CONCISE REVIEW SUMMARIZING THE AGENCY'S ACTIVITIES FOR THE COUNTY FUNDED PROGRAM. USE ADDITIONAL PAGES ONLY IF NECESSARY/REQUIRED.

Agency: Provide name of Agency as it appears on your Agreement.

Program: Provide title of the program or general service area as contracted.

Report Period: Identify dates covered by this narrative report. After the first report, begin with ending date of the previous report.

- I. Accomplishments  
Highlight significant or major accomplishments in the County funded program during the report period.
- II. Problems  
Provide a description of the problems that were encountered during this report period which would have a negative impact on the program. Also, provide a plan for a corrective action, to include time of implementation, effect on the program, and indicate if there is a need to modify the program, goals, Agreement or funding.
- III. Status Report on Provision of Services, Goals and Objectives (Report period and year-to-date)  
Report statistically on program goal achievements for report period and year-to-date total.
- IV. Other Comments  
Use this section for general remarks regarding Agency, etc. General information to assist in understanding the program's operation and purpose may be included.

With each Program Performance Report, attach details on Performance. See Exhibit "A", Scope of Service, for detailed deliverables, benchmarks and performance measures to be part of each Program Performance Report. Additional Financial Reporting and documentation are detailed in Exhibit "B".

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**EXHIBIT E**  
**AFFIDAVIT OF COMPLIANCE**

Before me, a notary public, in and for the State of Florida – at large, personally appeared,  
\_\_\_\_\_, and having first made due oath or affirmation, states:  
(Full Name)

1. My name is \_\_\_\_\_  
(Full Name)

2. I am the \_\_\_\_\_ of \_\_\_\_\_  
(Job Title) (Company Name)

3. The Company was formed in \_\_\_\_\_ and is a \_\_\_\_\_  
(Country and State) (Type of Entity (i.e., LLC., Inc.))

4. I am duly authorized and empowered and have sufficient knowledge to execute and deliver this Affidavit.

5. I affirm that the Company is not:

- a. Owned or controlled by the government of the People's Republic of China, the Russian Federation, the Islamic Republic of Iran, the Democratic People's Republic of Korea, the Republic of Cuba, the Venezuelan regime of Nicolás Maduro, or the Syrian Arab Republic (collectively and individually, a Foreign Country of Concern), including any agency of or any other entity of significant control of such Foreign Country of Concern. Where 'controlled by' means *having possession of the power to direct or cause the direction of the management or policies of a company, whether through ownership of securities, by contract, or otherwise; or a person or entity that directly or indirectly has the right to vote 25 percent or more of the voting interests of the company or that is entitled to 25 percent or more of its profits is presumed to control the foreign entity; or*
- b. A partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a Foreign Country of Concern, or a subsidiary of such entity.

Under penalties of perjury, I declare that I have read the foregoing Affidavit and that the facts stated in it are true.

\_\_\_\_\_  
(Signature of Affiant)

The foregoing instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_  
by \_\_\_\_\_.  
(Name of Affiant)

Personally known \_\_\_\_\_

OR Produced Identification \_\_\_\_\_

Type of Identification Provided \_\_\_\_\_

\_\_\_\_\_  
PRINT, TYPE OR STAMP NAME OF NOTARY



## Action Item

### 2025-2026 Planning Budget Modification #1

#### **Background Information:**

Total budgeted revenue increased from \$26,247,676 to \$28,550,728 for an overall increase of \$2,303,052.

#### **Workforce Innovation & Opportunity Act (WIOA) Programs:**

- Decrease in WIOA AD/DW of \$25,448. [\(See FN 1\)](#)
- Increase in WIOA Youth of \$91,820. [\(See FN 1\)](#)
- Decrease in Rapid Response of \$59,444. [\(See FN 2\)](#)
- New award – WIOA Sectors of Strategic Focus for \$200,000. [\(See FN 3\)](#)
- New award – Sectors WIOA Get There Faster Veterans for \$105,000. [\(See FN 4\)](#)
- New award – Sectors WIOA Hope Navigator for \$60,000. [\(See FN 5\)](#)
- New award – WIOA Youth Career Exploration for \$180,000. [\(See FN 6\)](#)
- Increase in WIOA Hope Navigator of \$14,791. [\(See FN 1\)](#)
- Increase in NEG Hurricane Helene/Milton of \$1,533,184. [\(See FN 7\)](#)
- Increase in NEG Opioid Recovery of \$69,654. [\(See FN 1\)](#)
- Increase in Board Consolidation & Realignment of \$32,158. [\(See FN 1\)](#)

#### **Employment Services:**

- Increase in Wagner Peyser of \$31,241. [\(See FN 1\)](#)
- Decrease in Apprenticeship Navigator of \$20,000. [\(See FN 2\)](#)
- Decrease in Hope Navigator of \$3,222. [\(See FN 2\)](#)
- Increase in SNAP of \$20,098. [\(See FN 1\)](#)
- Increase in TAA of \$15,000. [\(See FN 8\)](#)
- Decrease in RESEA of \$89,697. [\(See FN 1\)](#)
- Decrease in Military Family of \$45,937. [\(See FN 2\)](#)

#### **Welfare Transition Program:**

- Increase in WTP of \$17,588. [\(See FN 1\)](#)

#### **Direct Grants and Special Projects:**

- Decrease in Hillsborough County Re-entry Program of \$10,789. [\(See FN 1\)](#)
- Increase in Hillsborough County ACE Program of \$85,371. [\(See FN 1\)](#)
- Increase in Hillsborough County Sector Strategies Initiative of \$101,685. [\(See FN 1\)](#)

Additionally, there was an increase in expenditures of \$2,304,809.

**Recommendation:**

The Finance Audit Committee recommends approval of the adjustment to the revenue budget and resultant modification to the expenditure budget.

**Footnotes:**

- 1) *Difference in carry-forward amounts projected in original planning budget.*
- 2) *Grant awards begin 7/1/2025. Less funding received than anticipated/projected in original planning budget .*
- 3) *New Award: WIOA Sectors of Strategic Focus - The purpose of this award is to support career exploration, occupational skills training, and supportive services in identified sectors of strategic focus. Those sectors include: Transportation, Logistics & Supply Chain, Manufacturing and Healthcare.*
- 4) *New Award: Sectors WIOA Get There Faster – This program assists with providing targeted, in-demand employment opportunities through career training and supportive services to military veterans, military spouses and eligible veteran spouses facing barriers to employment, with a focus on homeless and disabled veterans.*
- 5) *New Award Sectors WIOA Hope Navigator – This funding supports the delivery of specialized services and programming to help Hope Florida program participants find jobs, enroll in training and launch new career pathways that lead to self-sufficiency and economic prosperity.*
- 6) *New Award: WIOA Youth Career Exploration - CSTB was one of five Local Workforce Development Boards (LWDBs) in the state to receive this funding. The purpose of this award is to support the creation and/or expansion of career exploration and work-based learning opportunities aligned with Florida Sector based training initiatives that provide a variety of engaging activities tailored to the interests and aspirations of in-school and out-of-school youth from high poverty areas to many career opportunities in high growth industries.*
- 7) *Additional funding received from Florida Commerce to assist individuals and businesses impacted by Hurricanes Helene and Milton.*
- 8) *Additional funding received for the Trade Adjustment Assistance Program (TAA). This program is designed to allow eligible trade-affected workers to receive retraining and reemployment opportunities. Funds are requested from Florida Commerce as need is determined.*



## ***2025-2026 Budgeted Revenues – Modification #1 Funding by County and Combined***

**2025-2026 Planning Budget**  
**Combined Budgeted Revenue Variances**

Funding/Program	Approved Budget FY2025/2026	Budget Mod #1 FY2025/2026	\$ Change
<b>Workforce Innovation &amp; Opportunity Act</b>			
Adult	4,328,756	4,635,859	307,103
Dislocated Worker	4,173,059	3,840,508	(332,551)
<b>Total Adult/Dislocated Worker</b>	<b>8,501,815</b>	<b>8,476,367</b>	<b>(25,448)</b>
Youth	2,691,308	2,783,128	91,820
Rapid Response	409,444	350,000	(59,444)
Sectors - Get There Faster - Veterans	-	105,000	105,000
Sectors - Hope Navigator	-	74,791	74,791
Sectors - Sectors of Strategic Focus	-	200,000	200,000
Youth Career Exploration	-	180,000	180,000
NEG- Hurricane Helene/Milton	230,000	1,763,184	1,533,184
NEG- Opioid Recovery	192,500	262,154	69,654
Board Consolidation & Realignment	300,000	332,158	32,158
<b>Subtotal Workforce Innovation &amp; Opportunity Act</b>	<b>12,325,067</b>	<b>14,526,782</b>	<b>2,201,715</b>
	-	-	
<b>Employment Services</b>			
Wagner Peyser	2,497,130	2,528,371	31,241
Apprenticeship Navigator	100,000	80,000	(20,000)
Hope Navigator	90,000	86,778	(3,222)
Veterans Programs (DVOP/LVER)	450,000	450,000	-
Supplemental Nutrition Assistance Program (SNAP)	940,821	960,919	20,098
Trade Adjustment Assistance Program (TAA)	50,000	65,000	15,000
Reemployment Services & Eligibility Assessment (RESEA)	1,650,000	1,560,303	(89,697)
Military Family/Spouse	275,937	230,000	(45,937)
<b>Subtotal Employment Services</b>	<b>6,053,888</b>	<b>5,961,371</b>	<b>(92,517)</b>
	-	-	
<b>Welfare Transition Program</b>			
Welfare Transition Program (WTP)	5,858,721	5,876,309	17,588
<b>Subtotal Welfare Transition Program</b>	<b>5,858,721</b>	<b>5,876,309</b>	<b>17,588</b>
	-	-	
<b>Direct Grants &amp; Special Projects</b>			
Hillsborough County Re-entry Program	187,500	176,711	(10,789)
Hillsborough County ACE Program	1,016,250	1,101,621	85,371
Hillsborough County Sector Strategies Initiative	590,000	691,685	101,685
Good Jobs Initiative	25,250	25,250	-
<b>Subtotal Direct Grants &amp; Special Projects</b>	<b>1,819,000</b>	<b>1,995,267</b>	<b>176,267</b>
	-	-	
<b>Total Budgeted Revenues - Combined</b>	<b>26,056,676</b>	<b>28,359,728</b>	<b>2,303,052</b>



**2025-2026 Planning Budget**  
**Budgeted Revenue Variances**  
**Pinellas County**

Funding/Program	Approved Budget FY2025/ 2026	Budget Mod #1 FY2025/ 2026	\$ Change
<b>Workforce Innovation &amp; Opportunity Act</b>			
Adult	1,163,308	1,233,657	70,349
Dislocated Worker	1,817,495	1,709,915	(107,580)
<b>Total Adult/Dislocated Worker</b>	<b>2,980,803</b>	<b>2,943,572</b>	<b>(37,231)</b>
Youth	715,728	649,596	(66,132)
Rapid Response	85,984	75,000	(10,984)
Sectors - Get There Faster - Veterans	-	31,500	31,500
Sectors - Hope Navigator	-	34,531	34,531
Sectors - Sectors of Strategic Focus	-	100,000	100,000
Youth Career Exploration	-	126,000	126,000
NEG- Hurricane Helene/Milton	30,000	881,592	851,592
NEG- Opioid Recovery	62,500	81,812	19,312
<b>Subtotal Workforce Innovation &amp; Opportunity Act</b>	<b>3,875,015</b>	<b>4,923,603</b>	<b>1,048,588</b>
<b>Employment Services</b>			
Wagner Peyser	919,360	923,524	4,164
Apprenticeship Navigator	50,000	24,000	(26,000)
Hope Navigator	45,000	29,765	(15,235)
Veterans Programs (DVOP/LVER)	200,000	200,000	-
Supplemental Nutrition Assistance Program (SNAP)	259,213	277,890	18,677
Trade Adjustment Assistance Program (TAA)	25,000	25,000	-
Reemployment Services & Eligibility Assessment (RESEA)	457,000	607,998	150,998
<b>Subtotal Employment Services</b>	<b>1,955,573</b>	<b>2,088,177</b>	<b>132,604</b>
<b>Welfare Transition Program</b>			
Welfare Transition Program (WTP)	1,608,390	1,563,762	(44,628)
<b>Subtotal Welfare Transition Program</b>	<b>1,608,390</b>	<b>1,563,762</b>	<b>(44,628)</b>
<b>Total Budgeted Revenues - Pinellas County</b>	<b>7,438,978</b>	<b>8,575,542</b>	<b>1,136,564</b>

**2025-2026 Planning Budget**  
**Budgeted Revenue Variances**  
**Hillsborough County**

Funding/Program	Approved Budget FY2025/ 2026	Budget Mod #1 FY2025/ 2026	\$ Change
<b>Workforce Innovation &amp; Opportunity Act</b>			
Adult	3,165,448	3,402,202	236,754
Dislocated Worker	2,355,564	2,130,593	(224,971)
<b>Total Adult/Dislocated Worker</b>	<b>5,521,012</b>	<b>5,532,795</b>	<b>11,783</b>
Youth	1,975,580	2,133,532	157,952
Rapid Response	323,460	275,000	(48,460)
Sectors - Get There Faster - Veterans	-	73,500	73,500
Sectors - Hope Navigator	-	40,260	40,260
Sectors - Sectors of Strategic Focus	-	100,000	100,000
Youth Career Exploration	-	54,000	54,000
NEG- Hurricane Helene/Milton	200,000	881,592	681,592
NEG- Opioid Recovery	130,000	180,342	50,342
Board Consolidation & Realignment	300,000	332,158	32,158
<b>Subtotal Workforce Innovation &amp; Opportunity Act</b>	<b>8,450,052</b>	<b>9,603,179</b>	<b>1,153,127</b>
<b>Employment Services</b>			
Wagner Peyser	1,577,770	1,604,847	27,077
Apprenticeship Navigator	50,000	56,000	6,000
Hope Navigator	45,000	57,013	12,013
Veterans Programs (DVOP/LVER)	250,000	250,000	-
Supplemental Nutrition Assistance Program (SNAP)	681,608	683,029	1,421
Trade Adjustment Assistance Program (TAA)	25,000	40,000	15,000
Reemployment Services & Eligibility Assessment (RESEA)	1,193,000	952,305	(240,695)
Military Family/Spouse	275,937	230,000	(45,937)
<b>Subtotal Employment Services</b>	<b>4,098,315</b>	<b>3,873,194</b>	<b>(225,121)</b>
<b>Welfare Transition Program</b>			
Welfare Transition Program (WTP)	4,250,331	4,312,547	62,216
<b>Subtotal Welfare Transition Program</b>	<b>4,250,331</b>	<b>4,312,547</b>	<b>62,216</b>
<b>Direct Grants &amp; Special Projects</b>			
Hillsborough County Re-entry Program	187,500	176,711	(10,789)
Hillsborough County ACE Program	1,016,250	1,101,621	85,371
Hillsborough County Sector Strategies Initiative	590,000	691,685	101,685
Good Jobs Initiative	25,250	25,250	-
<b>Subtotal Direct Grants &amp; Special Projects</b>	<b>1,819,000</b>	<b>1,995,267</b>	<b>176,267</b>
<b>Total Budgeted Revenues - Hillsborough County</b>	<b>18,617,698</b>	<b>19,784,186</b>	<b>1,166,488</b>



***2025-2026 Planning Budget (Revenues &  
Expenses) – Modification #1  
by County and Combined***

**CareerSource Tampa Bay**  
**2025-2026 Planning Budget Combined**

Budget Category	Approved Budget 2025- 2026	Budget Mod #1 2025-2026	\$ Change
Grant Revenue - Federal	24,237,676	26,364,461	2,126,785
Grant Revenue - Local	1,819,000	1,995,267	176,267
Total Grant Revenue	<b>26,056,676</b>	<b>28,359,728</b>	<b>2,303,052</b>
Other Income	191,000	191,000	-
Total Revenues	<b>26,247,676</b>	<b>28,550,728</b>	<b>2,303,052</b>
Salaries	10,521,187	10,506,027	(15,160)
Payroll Tax & Fringe	2,697,420	2,682,944	(14,477)
Retirement	784,605	789,332	4,728
Staff Training & Education	145,500	175,000	29,500
Accounting & Professional fees	641,600	705,155	63,555
Occupancy	2,232,479	2,191,629	(40,850)
Contract Labor	754,460	675,728	(78,732)
Office Expense	952,075	1,019,539	67,464
Insurance	156,368	156,368	0
Communications	203,920	203,920	-
Community Outreach	573,310	576,341	3,031
Travel	180,150	187,150	7,000
Meetings & Conferences	97,700	94,200	(3,500)
License, Dues & Other Fees	63,300	63,300	-
Other expense	7,480	10,000	2,520
Customer Training & Related Costs	5,636,475	7,905,455	2,268,980
Service Provider Contracts	304,250	315,000	10,750
Total Expenses	<b>25,952,279</b>	<b>28,257,088</b>	<b>2,304,809</b>
Net Income/(Loss)	<b>25,220</b>	<b>25,220</b>	<b>-</b>
Unobligated Balance	<b>270,177</b>	<b>268,420</b>	<b>(1,757)</b>



**Pinellas County**  
**2025-2026 Planning Budget**

Budget Category	Approved Budget 2025- 2026	Budget Mod #1 2025-2026	\$ Change
Grant Revenue - Federal	7,438,978	8,575,542	1,136,564
Grant Revenue - Local	-		
<b>Total Grant Revenue</b>	<b>7,438,978</b>	<b>8,575,542</b>	<b>1,136,564</b>
Other Income	95,000	95,000	-
<b>Total Revenues</b>	<b>7,533,978</b>	<b>8,670,542</b>	<b>1,136,564</b>
<b>Expenses</b>			
Salaries	3,174,114	3,235,028	60,914
Payroll Tax & Fringe	706,820	728,525	21,705
Retirement	240,556	244,972	4,416
Staff Training & Education	37,500	58,650	21,150
Accounting & Professional fees	161,600	194,100	32,500
Occupancy	520,983	543,741	22,758
Contract Labor	231,000	174,240	(56,760)
Office Expense	302,186	313,119	10,933
Insurance	52,131	52,131	0
Communications	90,080	90,080	-
Community Outreach	100,000	100,000	-
Travel	55,250	55,250	-
Meetings & Conferences	26,200	21,200	(5,000)
License, Dues & Other Fees	28,100	28,100	-
Other expense	2,480	5,000	2,520
Customer Training & Related Costs	1,564,475	2,516,455	951,980
Service Provider Contract	139,250	180,000	40,750
<b>Total Expenses</b>	<b>7,432,725</b>	<b>8,540,592</b>	<b>1,107,867</b>
<b>Net Income/(Loss)</b>	<b>12,000</b>	<b>12,000</b>	<b>-</b>
<b>Unobligated Balance</b>	<b>89,253</b>	<b>117,950</b>	<b>28,697</b>

## Hillsborough County

### 2025-2026 Planning Budget

Budget Category	Approved Budget 2025- 2026	Budget Mod #1 2025-2026	\$ Change
Grant Revenue - Federal	16,798,698	17,788,919	990,221
Grant Revenue - Local	1,819,000	1,995,267	176,267
<b>Total Grant Revenue</b>	<b>18,617,698</b>	<b>19,784,186</b>	<b>1,166,488</b>
Other Income	96,000	96,000	-
<b>Total Revenues</b>	<b>18,713,698</b>	<b>19,880,186</b>	<b>1,166,488</b>
<b>Expenses</b>			
Salaries	7,347,073	7,270,999	(76,074)
Payroll Tax & Fringe	1,990,600	1,954,418	(36,182)
Retirement	544,049	544,360	312
Staff Training & Education	108,000	116,350	8,350
Accounting & Professional fees	480,000	511,055	31,055
Occupancy	1,711,496	1,647,888	(63,608)
Contract Labor	523,460	501,488	(21,972)
Office Expense	649,889	706,420	56,530
Insurance	104,237	104,237	(0)
Communications	113,840	113,840	-
Community Outreach	473,310	476,341	3,031
Travel	124,900	131,900	7,000
Meetings & Conferences	71,500	73,000	1,500
License, Dues & Other Fees	35,200	35,200	-
Other expense	5,000	5,000	-
Customer Training & Related Costs	4,072,000	5,389,000	1,317,000
Service Provider Contracts	165,000	135,000	(30,000)
<b>Total Expenses</b>	<b>18,519,554</b>	<b>19,716,496</b>	<b>1,196,942</b>
<b>Net Income/(Loss)</b>	<b>13,220</b>	<b>13,220</b>	<b>-</b>
<b>Unobligated Balance</b>	<b>180,924</b>	<b>150,470</b>	<b>(30,454)</b>



***2024-2025 Planning Budget by Funding Type  
- Modification #4  
by County and Combined***

**Planning Budget by Funding Type**  
**Combined CareerSource Tampa Bay**  
**Fiscal Year 2026 (July 2025-June 2026)**

	Workforce Innovation & Opportunity Act	Employment Services Programs	Welfare Transition Programs	Direct Grants & Special Projects	Total Program Budget FY2025-2026	Unrestricted	Total Organization Budget FY 2025-2026	Prior Approved Budget FY 2025-2026	Modification #1
<b>Revenue:</b>									
Fiscal Year 2026 New Allocations	7,958,352	4,715,882	5,088,721	1,125,625	18,888,579	-	18,888,579	19,053,970	(165,391)
Carryforward from Prior Year Allocations	6,568,430	1,245,489	787,588	869,642	9,471,149	-	9,471,149	7,002,706	2,468,443
Projected Unrestricted Revenue	-	-	-	-	-	191,000	191,000	191,000	-
<b>Total Revenue</b>	<b>14,526,782</b>	<b>5,961,371</b>	<b>5,876,309</b>	<b>1,995,267</b>	<b>28,359,728</b>	<b>191,000</b>	<b>28,550,728</b>	<b>26,247,676</b>	<b>2,303,052</b>
<b>Expenditures:</b>									
<b>Program Services - Allocated Costs:</b>									
Business Services	1,437,673	223,946	461,416	-	2,123,035	-	2,123,035	2,215,000	(91,965)
Case Management	2,813,996	1,603,921	1,322,180	-	5,740,097	-	5,740,097	6,021,788	(281,691)
Program Services	1,479,440	420,902	784,360	-	2,684,702	-	2,684,702	3,703,693	(1,018,991)
One Stop Operating/Facilities Costs	647,064	1,533,544	180,448	188,944	2,550,000	-	2,550,000	2,295,000	255,000
Technology	280,562	739,151	138,083	67,204	1,225,000	-	1,225,000	750,000	475,000
Community Outreach	251,271	541,013	103,563	54,153	950,000	-	950,000	420,000	530,000
Program Staff Training & Professional Development	18,428	47,646	8,630	2,796	77,500	-	77,500	77,500	-
<b>Subtotal - Program Services Allocated</b>	<b>6,928,434</b>	<b>5,110,123</b>	<b>2,998,680</b>	<b>313,097</b>	<b>15,350,334</b>	<b>-</b>	<b>15,350,334</b>	<b>15,482,981</b>	<b>(132,647)</b>
<b>Program Services - Direct Costs:</b>									
Participant & Work Based Learning	5,409,500	57,000	2,039,475	757,000	8,262,975	-	8,262,975	6,006,475	2,256,500
Direct Grants & Special Projects - Salaries & Benefits	-	-	-	555,859	555,859	-	555,859	517,294	38,565
Direct Costs - Other	352,500	10,000	-	105,000	467,500	165,780	633,280	650,780	(17,500)
Subrecipient Contracts	122,433	37,626	154,941	-	315,000	-	315,000	304,250	10,750
FLCommerce Staff Travel	-	50,500	-	-	50,500	-	50,500	50,500	-
<b>Subtotal - Program Services Direct</b>	<b>5,884,433</b>	<b>155,126</b>	<b>2,194,416</b>	<b>1,417,859</b>	<b>9,651,834</b>	<b>165,780</b>	<b>9,817,614</b>	<b>7,529,299</b>	<b>2,288,315</b>
<b>Total Program Service Costs:</b>	<b>12,812,867</b>	<b>5,265,249</b>	<b>5,193,096</b>	<b>1,730,956</b>	<b>25,002,168</b>	<b>165,780</b>	<b>25,167,948</b>	<b>23,012,280</b>	<b>2,155,668</b>
<b>Indirect Costs</b>									
Indirect Costs	1,576,859	646,883	641,055	224,343	3,089,140	-	3,089,140	2,940,000	149,140
<b>Total Indirect Costs</b>	<b>1,576,859</b>	<b>646,883</b>	<b>641,055</b>	<b>224,343</b>	<b>3,089,140</b>	<b>-</b>	<b>3,089,140</b>	<b>2,940,000</b>	<b>149,140</b>
<b>Total Expenditures</b>	<b>14,389,726</b>	<b>5,912,132</b>	<b>5,834,151</b>	<b>1,955,299</b>	<b>28,091,308</b>	<b>165,780</b>	<b>28,257,088</b>	<b>25,952,280</b>	<b>2,304,808</b>
<b>Projected Net Income/(Loss)</b>	<b>-</b>					<b>25,220</b>	<b>25,220</b>	<b>24,039</b>	<b>-</b>
<b>Unobligated Balance</b>	<b>137,056</b>	<b>49,239</b>	<b>42,158</b>	<b>39,968</b>	<b>268,420</b>	<b>-</b>	<b>268,420</b>	<b>271,357</b>	<b>(1,756)</b>



**Planning Budget by Funding Type**  
**Pinellas County**  
**Fiscal Year 2026 (July 2025-June 2026)**

	Workforce Innovation & Opportunity Act	Employment Services Programs	Welfare Transition Programs	Direct Grants & Special Projects	Total Program Budget FY2025- 2026	Unrestricted	Total Organization Budget FY 2025-2026	Prior Approved Budget FY 2025-2026	Modification #1
<b>Revenue:</b>									
Fiscal Year 2026 New Allocations	2,849,797	1,678,557	1,188,390	-	5,716,744	-	5,716,744	5,546,522	170,222
Carryforward from Prior Year Allocations	2,073,806	409,620	375,372	-	2,858,798	-	2,858,798	1,892,456	966,342
Projected Unrestricted Revenue	-	-	-	-	-	95,000	95,000	95,000	-
<b>Total Revenue</b>	<b>4,923,603</b>	<b>2,088,177</b>	<b>1,563,762</b>	<b>-</b>	<b>8,575,542</b>	<b>95,000</b>	<b>8,670,542</b>	<b>7,533,978</b>	<b>1,136,564</b>
<b>Expenditures:</b>									
<b>Program Services - Allocated Costs:</b>									
Business Services	505,317	127,777	234,941	-	868,035	-	868,035	895,000	(26,965)
Case Management	787,737	406,577	357,378	-	1,551,692	-	1,551,692	1,730,000	(178,308)
Program Services	432,651	240,932	230,667	-	904,250	-	904,250	1,183,000	(278,750)
One Stop Operating/Facilities Costs	215,672	434,328	-	-	650,000	-	650,000	545,000	105,000
Technology	107,555	317,445	-	-	425,000	-	425,000	250,000	175,000
Community Outreach	121,516	228,484	-	-	350,000	-	350,000	120,000	230,000
Program Staff Training & Professional Development	7,615	19,885	-	-	27,500	-	27,500	27,500	-
<b>Subtotal - Program Services Allocated</b>	<b>2,178,063</b>	<b>1,775,428</b>	<b>822,986</b>	<b>-</b>	<b>4,776,477</b>	<b>-</b>	<b>4,776,477</b>	<b>4,750,500</b>	<b>25,977</b>
<b>Program Services - Direct Costs:</b>									
Participant & Work Based Learning	2,102,500	22,000	464,475	-	2,588,975	-	2,588,975	1,639,475	949,500
Direct Grants & Special Projects - Salaries & Benefits	-	-	-	-	-	-	-	-	-
Direct Costs - Other	37,500	10,000	-	-	47,500	83,000	130,500	188,000	(57,500)
Subrecipient Contracts	43,062	23,980	112,958	-	180,000	-	180,000	139,250	40,750
FLCommerce Staff Travel	-	15,500	-	-	15,500	-	15,500	15,500	-
<b>Subtotal - Program Services Direct</b>	<b>2,183,062</b>	<b>71,480</b>	<b>577,433</b>	<b>-</b>	<b>2,831,975</b>	<b>83,000</b>	<b>2,914,975</b>	<b>1,982,225</b>	<b>932,750</b>
<b>Total Program Service Costs:</b>	<b>4,361,125</b>	<b>1,846,908</b>	<b>1,400,419</b>	<b>-</b>	<b>7,608,452</b>	<b>83,000</b>	<b>7,691,452</b>	<b>6,732,725</b>	<b>958,727</b>
<b>Indirect Costs</b>									
Indirect Costs	487,884	205,785	155,471	-	849,140	-	849,140	700,000	149,140
<b>Total Indirect Costs</b>	<b>487,884</b>	<b>205,785</b>	<b>155,471</b>	<b>-</b>	<b>849,140</b>	<b>-</b>	<b>849,140</b>	<b>700,000</b>	<b>149,140</b>
<b>Total Expenditures</b>	<b>4,849,009</b>	<b>2,052,693</b>	<b>1,555,890</b>	<b>-</b>	<b>8,457,592</b>	<b>83,000</b>	<b>8,540,592</b>	<b>7,432,725</b>	<b>1,107,867</b>
<b>Projected Net Income/(Loss)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>-</b>
<b>Unobligated Balance</b>	<b>74,594</b>	<b>35,484</b>	<b>7,872</b>	<b>-</b>	<b>117,950</b>	<b>-</b>	<b>117,950</b>	<b>89,253</b>	<b>28,697</b>

**Planning Budget by Funding Type**  
**Hillsborough County**  
**Fiscal Year 2026 (July 2025-June 2026)**

	Workforce Innovation & Opportunity Act	Employment Services Programs	Welfare Transition Programs	Direct Grants & Special Projects	Total Program Budget FY2025- 2026	Unrestricted	Total Organization Budget FY 2025-2026	Prior Approved Budget FY 2025-2026	Modification #1
<b>Revenue:</b>									
Fiscal Year 2026 New Allocations	5,108,555	3,037,325	3,900,331	1,125,625	13,171,835	-	13,171,835	13,507,448	(335,613)
Carryforward from Prior Year Allocations	4,494,624	835,869	412,216	869,642	6,612,351	-	6,612,351	5,110,250	1,502,101
Projected Unrestricted Revenue	-	-	-	-	-	96,000	96,000	96,000	-
<b>Total Revenue</b>	<b>9,603,179</b>	<b>3,873,194</b>	<b>4,312,547</b>	<b>1,995,267</b>	<b>19,784,186</b>	<b>96,000</b>	<b>19,880,186</b>	<b>18,713,698</b>	<b>1,166,488</b>
<b>Expenditures:</b>									
<b>Program Services - Allocated Costs:</b>									
Business Services	932,356	96,169	226,475	-	1,255,000	-	1,255,000	1,320,000	(65,000)
Case Management	2,026,259	1,197,344	964,802	-	4,188,405	-	4,188,405	4,291,788	(103,383)
Program Services	1,046,789	179,970	553,693	-	1,780,452	-	1,780,452	2,520,693	(740,241)
One Stop Operating/Facilities Costs	431,392	1,099,216	180,448	188,944	1,900,000	-	1,900,000	1,750,000	150,000
Technology	173,007	421,706	138,083	67,204	800,000	-	800,000	500,000	300,000
Community Outreach	129,755	312,529	103,563	54,153	600,000	-	600,000	300,000	300,000
Program Staff Training & Professional Development	10,813	27,761	8,630	2,796	50,000	-	50,000	50,000	-
<b>Subtotal - Program Services Allocated</b>	<b>4,750,371</b>	<b>3,334,695</b>	<b>2,175,694</b>	<b>313,097</b>	<b>10,573,857</b>	<b>-</b>	<b>10,573,857</b>	<b>10,732,481</b>	<b>(158,624)</b>
<b>Program Services - Direct Costs:</b>									
Participant & Work Based Learning	3,307,000	35,000	1,575,000	757,000	5,674,000	-	5,674,000	4,367,000	1,307,000
Direct Grants & Special Projects - Salaries & Benefits	-	-	-	555,859	555,859	-	555,859	517,294	38,565
Direct Costs - Other	315,000	-	-	105,000	420,000	82,780	502,780	462,780	40,000
Subrecipient Contracts	79,371	13,646	41,983	-	135,000	-	135,000	165,000	(30,000)
FLCommerce Staff Travel	-	35,000	-	-	35,000	-	35,000	35,000	-
<b>Subtotal - Program Services Direct</b>	<b>3,701,371</b>	<b>83,646</b>	<b>1,616,983</b>	<b>1,417,859</b>	<b>6,819,859</b>	<b>82,780</b>	<b>6,902,639</b>	<b>5,547,074</b>	<b>1,355,565</b>
<b>Total Program Service Costs:</b>	<b>8,451,742</b>	<b>3,418,341</b>	<b>3,792,677</b>	<b>1,730,956</b>	<b>17,393,716</b>	<b>82,780</b>	<b>17,476,496</b>	<b>16,279,555</b>	<b>1,196,941</b>
<b>Indirect Costs</b>									
Indirect Costs	1,088,975	441,098	485,584	224,343	2,240,000	-	2,240,000	2,240,000	-
<b>Total Indirect Costs</b>	<b>1,088,975</b>	<b>441,098</b>	<b>485,584</b>	<b>224,343</b>	<b>2,240,000</b>	<b>-</b>	<b>2,240,000</b>	<b>2,240,000</b>	<b>-</b>
<b>Total Expenditures</b>	<b>9,540,717</b>	<b>3,859,439</b>	<b>4,278,261</b>	<b>1,955,299</b>	<b>19,633,716</b>	<b>82,780</b>	<b>19,716,496</b>	<b>18,519,555</b>	<b>1,196,941</b>
<b>Projected Net Income/(Loss)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>13,220</b>	<b>13,220</b>	<b>13,220</b>	<b>-</b>
<b>Unobligated Balance</b>	<b>62,462</b>	<b>13,755</b>	<b>34,286</b>	<b>39,968</b>	<b>150,470</b>	<b>-</b>	<b>150,470</b>	<b>180,923</b>	<b>(30,453)</b>



## **Information Item**

# **Expenditure Reports for Period Ending September 30, 2025**

**Combined Budget to Actual**  
**CareerSource Tampa Bay**  
**For Period Ending 9/30/2025**

Budget Category	Proposed 2025- 2026 Planning Budget - Mod #1	Actual as of 9/30/2025	\$ Remaining Budget	% Earned/ Expended
Revenue - Grants	28,359,728	5,975,512	22,384,216	21%
Revenue - Other	191,000	54,279	136,721	28%
<b>Total Revenues</b>	<b>28,550,728</b>	<b>6,029,791</b>	<b>22,520,937</b>	<b>21%</b>
Salaries	10,506,027	2,600,032	7,905,996	25%
Payroll Tax & Fringe	2,682,943	584,616	2,098,327	22%
Retirement	789,332	184,978	604,354	23%
Staff Training & Education	175,000	12,103	162,898	7%
Accounting & Professional fees	705,155	144,062	561,094	20%
Occupancy	2,191,629	509,883	1,681,746	23%
Contract Labor	675,728	281,192	394,536	42%
Office Expense	1,019,539	110,466	909,073	11%
Insurance	156,369	2,049	154,320	1%
Communications	203,920	40,545	163,375	20%
Community Outreach	576,341	42,407	533,934	7%
Travel	187,150	39,464	147,686	21%
Meetings & Conferences	94,200	24,744	69,456	26%
License, Dues & Other Fees	63,300	11,336	51,964	18%
Other expense	10,000	1,834	8,166	18%
Customer Training & Related Costs	7,905,455	1,396,867	6,508,588	18%
Service Provider Contract	315,000	43,214	271,786	14%
<b>Total Expenses</b>	<b>28,257,088</b>	<b>6,029,791</b>	<b>22,227,297</b>	<b>21%</b>
Projected Net Income/(Loss)	25,220	(0)		
Unobligated Balance	268,420	-		

**Budget to Actual**  
**Pinellas County**  
**For Period Ending 9/30/2025**

Budget Category	Proposed 2025- 2026 Planning Budget - Mod #1	Actual as of 9/30/2025	\$ Remaining Budget	% Earned/ Expended
Revenue - Grants	8,575,542	1,599,558	6,975,984	19%
Revenue - Other	95,000	15,434	79,566	16%
<b>Total Revenues</b>	<b>8,670,542</b>	<b>1,614,992</b>	<b>7,055,550</b>	<b>19%</b>
Salaries	3,235,028	785,084	2,449,944	24%
Payroll Tax & Fringe	728,525	158,902	569,623	22%
Retirement	244,972	56,929	188,043	23%
Staff Training & Education	58,650	1,766	56,884	3%
Accounting & Professional fees	194,100	12,567	181,533	6%
Occupancy	543,741	102,078	441,663	19%
Contract Labor	174,240	68,123	106,117	39%
Office Expense	313,119	16,687	296,432	5%
Insurance	52,132	2,049	50,083	4%
Communications	90,080	22,277	67,803	25%
Community Outreach	100,000	5,897	94,103	6%
Travel	55,250	7,961	47,289	14%
Meetings & Conferences	21,200	3,110	18,090	15%
License, Dues & Other Fees	28,100	3,249	24,851	12%
Other expense	5,000	1,822	3,178	36%
Customer Training & Related Costs	2,516,455	350,455	2,166,000	14%
Service Provider Contract	180,000	16,036	163,964	9%
<b>Total Expenses</b>	<b>8,540,592</b>	<b>1,614,992</b>	<b>6,925,600</b>	<b>19%</b>
Projected Net Income/(Loss)	12,000	(0)		
Unobligated Balance	117,950	-		



**Budget to Actual**  
**Hillsborough County**  
**For Period Ending 9/30/2025**

Budget Category	Proposed 2025- 2026 Planning Budget - Mod #1	Actual as of 9/30/2025	\$ Remaining Budget	% Earned/ Expended
Revenue - Grants	19,784,186	4,375,954	15,408,232	22%
Revenue - Other	96,000	38,845	57,155	40%
<b>Total Revenues</b>	<b>19,880,186</b>	<b>4,414,799</b>	<b>15,465,387</b>	<b>22%</b>
Salaries	7,270,999	1,814,947	5,456,052	25%
Payroll Tax & Fringe	1,954,418	425,715	1,528,703	22%
Retirement	544,360	128,049	416,311	24%
Staff Training & Education	116,350	10,337	106,014	9%
Accounting & Professional fees	511,055	131,494	379,561	26%
Occupancy	1,647,888	407,805	1,240,083	25%
Contract Labor	501,488	213,069	288,419	42%
Office Expense	706,420	93,778	612,642	13%
Insurance	104,237	-	104,237	0%
Communications	113,840	18,268	95,572	16%
Community Outreach	476,341	36,510	439,831	8%
Travel	131,900	31,503	100,397	24%
Meetings & Conferences	73,000	21,634	51,366	30%
License, Dues & Other Fees	35,200	8,086	27,114	23%
Other expense	5,000	12	4,988	0%
Customer Training & Related Costs	5,389,000	1,046,412	4,342,588	19%
Service Provider Contract	135,000	27,179	107,821	20%
<b>Total Expenses</b>	<b>19,716,496</b>	<b>4,414,799</b>	<b>15,301,697</b>	<b>22%</b>
Projected Net Income/(Loss)	13,220	(0)		
Unobligated Balance	150,470	-		

CareerSource Tampa Bay  
Combined Grant Award to Actual Expenditures

Program Description	Award Begin Date	Award End Date	Award Amount	FY 25-26 Budget	FY 25-26 Expenditures YTD	FY 25-26 Remaining Budget	FY 25-26 Expenditure Rate	Overall Expenditure Rate Expected	Overall Expenditure Rate Actual
Workforce Innovation Opportunity Act									
WIOA - Adult PY2024	7/1/24	6/30/26	2,852,672	2,241,967	1,146,118	1,095,849	51%	63%	62%
WIOA - Adult PY2025	7/1/25	6/30/27	2,843,845	2,275,074	-	2,275,074	0%	12%	0%
WIOA - Dislocated Worker PY2024	7/1/24	6/30/26	3,594,257	970,478	188,897	781,581	19%	63%	78%
WIOA - Dislocated Worker PY2025	7/1/25	6/30/27	3,415,808	2,732,646	-	2,732,646	0%	12%	0%
WIOA - Youth PY2024	7/1/24	6/30/26	2,679,074	612,395	494,547	117,848	81%	63%	96%
WIOA - Youth PY2025	4/1/25	6/30/27	2,569,536	2,055,628	240,745	1,814,883	12%	22%	9%
WIOA - Supplemental	7/1/24	6/30/26	371,303	371,303	-	371,303	0%	63%	0%
WIOA - Rapid Response	7/1/25	6/30/26	350,000	350,000	38,821	311,179	11%	25%	11%
WIOA - Sectors - Get There Faster (Veterans & Military Spous	7/1/25	6/30/26	105,000	105,000	-	105,000	0%	25%	0%
WIOA - Sectors - Hope Navigator	7/1/24	8/31/25	256,254	14,792	12,570	2,222	85%	100%	99%
WIOA - Sectors - Hope Navigator	7/1/25	6/30/26	60,000	60,000	3,901	56,099	7%	25%	7%
WIOA - Sectors - Sectors of Strategic Focus	7/1/25	6/30/26	200,000	200,000	-	200,000	0%	25%	0%
WIOA - Youth Career Exploration	7/1/25	6/30/26	180,000	180,000	-	180,000	0%	25%	0%
WIOA - DWG Hurricane Helene/Milton	10/1/24	9/30/26	2,322,795	1,763,185	297,833	1,465,352	17%	50%	37%
WIOA - Opioid Recovery	12/20/24	12/31/26	275,000	262,154	32,531	229,623	12%	38%	17%
WIOA - Board Consolidation & Realignment	6/3/24	12/31/25	592,617	332,158	105,814	226,344	32%	84%	62%
Total Workforce Innovation Opportunity Act			22,668,161	14,526,782	2,561,777	11,965,005	18%		
Employment Services									
Wagner Peyser PY2024	7/1/24	9/30/25	2,409,633	463,731	463,731	0	100%	100%	100%
Wagner Peyser PY2025	7/1/25	9/30/26	2,339,640	2,064,640	96,883	1,967,757	5%	20%	4%
WP - Apprenticeship Navigator	7/1/25	6/30/26	80,000	80,000	28,075	51,925	35%	25%	35%
WP - Hope Navigator	7/1/23	8/31/25	112,488	8,207	8,207	(0)	100%	100%	100%
WP - Hope Navigator	7/1/25	6/30/26	78,571	78,571	10,655	67,916	14%	25%	14%
DVOP	10/1/24	6/30/26	369,289	280,000	7,520	272,480	0%	57%	26%
LVER	10/1/24	6/30/26	223,322	170,000	3,712	166,288	2%	57%	26%
Supplemental Nutrition Assistance Program PY2024	10/1/24	9/30/25	913,434	301,498	301,498	(0)	100%	100%	100%
Supplemental Nutrition Assistance Program PY2025	10/1/25	9/30/26	867,762	659,418	-	659,418	0%	0%	0%
TAA Training	7/1/25	9/30/26	65,000	65,000	389	64,611	1%	20%	1%
RESEA Transition PY2024	1/1/24	12/30/25	1,406,005	472,055	351,641	120,414	74%	88%	91%
RESEA Transition PY2025	1/1/25	9/30/26	1,435,000	1,088,250	-	1,088,250	0%	43%	0%
Military Family	7/1/25	6/30/26	230,000	230,000	87,561	142,439	38%	25%	38%
Total Employment Services			10,530,144	5,961,370	1,359,872	4,601,498	23%		
Welfare Transition									
Welfare Transition Program PY2024 Oct-June	10/1/24	8/31/25	4,322,954	787,588	787,588	0	100%	100%	100%
Welfare Transition Program PY2025 July-Sept	7/1/25	11/30/25	1,810,824	1,810,824	1,038,670	772,154	57%	60%	57%
Welfare Transition Program PY2025 Oct-June	10/1/25	8/31/26	3,632,472	3,277,897	-	3,277,897	0%	0%	0%
Total Welfare Transition			9,766,250	5,876,309	1,826,258	4,050,051	31%		
Direct Grants & Special Projects									
Hills County - Targeted Industry Sector Workforce Prog	10/1/24	9/30/25	500,000	216,685	115,339	101,346	53%	100%	82%
Hills County - Targeted Industry Sector Workforce Prog	10/1/25	9/30/26	500,000	475,000	-	475,000	0%	0%	0%
Hills County - ACE 5.0	10/1/24	9/30/25	755,000	535,371	100,346	435,025	19%	100%	49%
Hills County - ACE 6.0	10/1/25	9/30/26	755,000	566,250	-	566,250	0%	0%	0%
Hills County - Ex-Offender/Returning Citizen	10/1/24	9/30/25	150,000	92,336	7,933	84,403	9%	100%	61%
Hills County - Ex-Offender/Returning Citizen	10/1/25	9/30/26	112,500	84,375	-	84,375	0%	0%	0%
Good Jobs Initiative	7/1/23	6/30/26	25,250	25,250	-	25,250	0%	75%	0%
Total Direct Grants & Special Projects			2,797,750	1,995,267	223,618	1,771,649	11%		
Totals			\$ 28,359,728	5,971,525	22,388,203	21%			

Pinellas County  
Grant Award to Expenditure Report  
FY 2025-2026  
For Period Ending 9/30/2025

Program Description	Award Begin Date	Award End Date	Award Amount	FY 25-26 Budget	FY 25-26 Expenditures YTD	FY 25-26 Remaining Budget	FY 25-26 Expenditure Rate	Overall Expenditure Rate Expected	Overall Expenditure Rate Actual
<b>Workforce Innovation Opportunity Act</b>									
WIOA - Adult PY2024	7/1/24	6/30/26	998,435	509,550	326,029	183,521	64%	63%	82%
WIOA - Adult PY2025	7/1/25	6/30/27	853,153	682,520	-	682,520	0%	12%	0%
WIOA - Dislocated Worker PY2024	7/1/24	6/30/26	1,293,933	268,180	76,829	191,351	29%	63%	85%
WIOA - Dislocated Worker PY2025	7/1/25	6/30/27	1,742,062	1,393,649	-	1,393,649	0%	12%	0%
WIOA - Youth PY2024	7/1/24	6/30/26	776,931	198,185	80,337	117,848	41%	63%	85%
WIOA - Youth PY2025	4/1/25	6/30/27	513,907	411,125	-	411,125	0%	22%	0%
WIOA - Supplemental	7/1/24	6/30/26	129,956	129,956	-	129,956	0%	63%	0%
WIOA - Rapid Response	7/1/25	6/30/26	75,000	75,000	12,802	62,198	17%	25%	17%
WIOA - Sectors - Get There Faster (Veterans & Military Spous	7/1/25	6/30/26	31,500	31,500	-	31,500	0%	25%	0%
WIOA - Sectors - Hope Navigator	7/1/24	8/31/25	128,127	4,532	4,532	0	100%	100%	100%
WIOA - Sectors - Hope Navigator	7/1/25	6/30/26	30,000	30,000	-	30,000	0%	25%	0%
WIOA - Sectors - Sectors of Strategic Focus	7/1/25	6/30/26	100,000	100,000	-	100,000	0%	25%	0%
WIOA - Youth Career Exploration	7/1/25	6/30/26	126,000	126,000	-	126,000	0%	25%	0%
WIOA - DWG Hurricane Helene/Milton	10/1/24	9/30/26	899,998	881,593	7,317	874,276	1%	50%	3%
WIOA - Opioid Recovery	12/20/24	12/31/26	82,500	81,813	12,397	69,416	15%	38%	16%
<b>Total Workforce Innovation Opportunity Act</b>			<b>7,781,502</b>	<b>4,923,603</b>	<b>520,243</b>	<b>4,403,360</b>	<b>11%</b>		
<b>Employment Services</b>									
Wagner Peyser PY2024	7/1/24	9/30/25	701,946	112,046	112,046	(0)	100%	100%	100%
Wagner Peyser PY2025	7/1/25	9/30/26	811,478	811,478	-	811,478	0%	20%	0%
WP - Apprenticeship Navigator	7/1/25	6/30/26	24,000	24,000	4,537	19,463	19%	25%	19%
WP - Hope Navigator	7/1/23	8/31/25	37,673	6,194	6,194	(0)	100%	100%	100%
WP - Hope Navigator	7/1/25	6/30/26	23,571	23,571	3,911	19,660	0%	25%	0%
DVOP	10/1/24	6/30/26	129,203	125,000	1,702	123,298	1%	57%	5%
LVER	10/1/24	6/30/26	76,060	75,000	167	74,833	0%	57%	2%
Supplemental Nutrition Assistance Program PY2024	10/1/24	9/30/25	208,901	78,632	78,632	0	100%	100%	100%
Supplemental Nutrition Assistance Program PY2025	10/1/25	9/30/26	254,210	199,257	-	199,257	0%	0%	0%
TAA Training	7/1/25	9/30/26	25,000	25,000	389	24,611	2%	20%	2%
RESEA Transition PY2024	1/1/24	12/30/25	553,042	212,749	171,092	41,657	80%	88%	92%
RESEA Transition PY2025	1/1/25	9/30/26	511,000	395,250	-	395,250	0%	43%	0%
<b>Total Employment Services</b>			<b>3,356,084</b>	<b>2,088,176</b>	<b>378,670</b>	<b>1,709,506</b>	<b>18%</b>		
<b>Welfare Transition</b>									
Welfare Transition Program PY2024 Oct-June	10/1/24	8/31/25	1,428,629	375,372	375,372	0	100%	100%	100%
Welfare Transition Program PY2025 July-Sept	7/1/25	11/30/25	398,381	398,381	324,170	74,211	81%	60%	81%
Welfare Transition Program PY2025 Oct-June	10/1/25	8/31/26	790,009	790,009	-	790,009	0%	0%	0%
<b>Total Welfare Transition</b>			<b>2,617,019</b>	<b>1,563,762</b>	<b>699,542</b>	<b>864,220</b>	<b>45%</b>		
<b>Totals</b>				<b>\$ 8,575,542</b>	<b>1,598,455</b>	<b>6,977,087</b>	<b>19%</b>		



Hillsborough County  
Grant Award to Actual Expenditures  
FY 2025-2026  
For Period Ending 9/30/2025

Program Description	Award Begin Date	Award End Date	Award Amount	FY 25-26 Budget	FY 25-26 Expenditures YTD	FY 25-26 Remaining Budget	FY 25-26 Expenditure Rate	Overall Expenditure Rate Expected	Overall Expenditure Rate Actual
<b>Workforce Innovation Opportunity Act</b>									
WIOA - Adult PY2024	7/1/24	6/30/26	1,854,237	1,732,417	820,089	912,328	47%	63%	51%
WIOA - Adult PY2025	7/1/25	6/30/27	1,990,692	1,592,554	-	1,592,554	0%	12%	0%
WIOA - Dislocated Worker PY2024	7/1/24	6/30/26	2,300,324	702,298	112,068	590,230	16%	63%	74%
WIOA - Dislocated Worker PY2025	7/1/25	6/30/27	1,673,746	1,338,997	-	1,338,997	0%	12%	0%
WIOA - Youth PY2024	7/1/24	6/30/26	1,902,143	414,210	414,210	0	100%	63%	100%
WIOA - Youth PY2025	4/1/25	6/30/27	2,055,629	1,644,503	240,745	1,403,758	15%	22%	12%
WIOA - Supplemental	7/1/24	6/30/26	241,347	241,347	-	241,347	0%	0%	0%
WIOA - Rapid Response	7/1/25	6/30/26	275,000	275,000	26,019	248,981	9%	25%	9%
WIOA - Sectors - Get There Faster (Veterans & Military Spouse	7/1/25	6/30/26	73,500	73,500	-	73,500	0%	25%	0%
WIOA - Sectors - Hope Navigator	7/1/24	8/31/25	128,127	10,260	8,038	2,222	78%	100%	98%
WIOA - Sectors - Hope Navigator	7/1/25	6/30/26	30,000	30,000	3,901	26,099	13%	25%	13%
WIOA - Sectors - Sectors of Strategic Focus	7/1/25	6/30/26	100,000	100,000	-	100,000	0%	25%	0%
WIOA - Youth Career Exploration	7/1/25	6/30/26	54,000	54,000	-	54,000	0%	25%	0%
WIOA - DWG Hurricane Helene/Milton	10/1/24	9/30/26	1,422,797	881,592	290,516	591,076	33%	50%	58%
WIOA - Opioid Recovery	12/20/24	12/31/26	192,500	180,342	20,134	160,208	11%	38%	17%
WIOA - Board Consolidation & Realignment	6/3/24	12/31/25	592,617	332,158	105,814	226,344	32%	84%	62%
<b>Total Workforce Innovation Opportunity Act</b>			<b>14,886,659</b>	<b>9,603,179</b>	<b>2,041,534</b>	<b>7,561,645</b>	<b>21%</b>		
<b>Employment Services</b>									
Wagner Peyser PY2024	7/1/24	9/30/25	1,707,687	351,685	351,685	0	100%	100%	100%
Wagner Peyser PY2025	7/1/25	9/30/26	1,528,162	1,253,162	96,883	1,156,279	8%	20%	6%
WP - Apprenticeship Navigator	7/1/25	6/30/26	56,000	56,000	23,538	32,462	42%	25%	42%
WP - Hope Navigator	7/1/23	8/31/25	74,815	2,013	2,013	0	100%	100%	100%
WP - Hope Navigator	7/1/25	6/30/26	55,000	55,000	6,744	48,256	0%	25%	0%
DVOP	10/1/24	6/30/26	240,086	155,000	5,818	149,182	4%	57%	38%
LVER	10/1/24	6/30/26	147,262	95,000	3,545	91,455	4%	57%	38%
Supplemental Nutrition Assistance Program PY2024	10/1/24	9/30/25	704,533	222,866	222,866	(0)	100%	100%	100%
Supplemental Nutrition Assistance Program PY2025	10/1/25	9/30/26	613,552	460,161	-	460,161	0%	0%	0%
TAA Training	7/1/25	9/30/26	40,000	40,000	-	40,000	0%	20%	0%
RESEA Transition PY2024	1/1/24	12/30/25	852,963	259,306	180,549	78,757	70%	88%	91%
RESEA Transition PY2025	1/1/25	9/30/26	924,000	693,000	-	693,000	0%	43%	0%
Military Family	7/1/25	6/30/26	230,000	230,000	87,561	142,439	38%	25%	38%
<b>Total Employment Services</b>			<b>7,174,060</b>	<b>3,873,194</b>	<b>981,202</b>	<b>2,891,992</b>	<b>25%</b>		
<b>Welfare Transition</b>									
Welfare Transition Program PY2024 Oct-June	10/1/24	8/31/25	2,894,325	412,216	412,216	(0)	100%	100%	100%
Welfare Transition Program PY2025 July-Sept	7/1/25	11/30/25	1,412,443	1,412,443	714,500	697,943	51%	60%	51%
Welfare Transition Program PY2025 Oct-June	10/1/25	8/31/26	2,842,463	2,487,888	-	2,487,888	0%	0%	0%
<b>Total Welfare Transition</b>			<b>7,149,231</b>	<b>4,312,547</b>	<b>1,126,716</b>	<b>3,185,831</b>	<b>26%</b>		
<b>Direct Grants &amp; Special Projects</b>									
Hills County - Targeted Industry Sector Workforce Prog	10/1/24	9/30/25	500,000	216,685	115,339	101,346	53%	100%	82%
Hills County - Targeted Industry Sector Workforce Prog	10/1/25	9/30/26	500,000	475,000	-	475,000	0%	0%	0%
Hills County - ACE 5.0	10/1/24	9/30/25	755,000	535,371	100,346	435,025	19%	100%	49%
Hills County - ACE 6.0	10/1/25	9/30/26	755,000	566,250	-	566,250	0%	0%	0%
Hills County - Ex-Offender/Returning Citizen	10/1/24	9/30/25	150,000	92,336	7,933	84,403	9%	100%	61%
Hills County - Ex-Offender/Returning Citizen	10/1/25	9/30/26	112,500	84,375	-	84,375	0%	0%	0%
Good Jobs Initiative	7/1/23	6/30/26	25,250	25,250	-	25,250	0%	0%	0%
<b>Total Direct Grants &amp; Special Projects</b>			<b>2,797,750</b>	<b>1,995,267</b>	<b>223,618</b>	<b>1,771,649</b>	<b>11%</b>		
<b>Totals</b>			<b>\$ 19,784,186</b>	<b>4,373,070</b>	<b>15,411,116</b>	<b>22%</b>			



## **Action Item**

### **Employee Handbook Change**

#### **Background**

The Employee Handbook guides and directs employment related policies at CareerSource Tampa Bay. The handbook was updated, approved, and renamed to CareerSource Hillsborough Pinellas Employee Handbook and approved after the merger of both entities by the Board of Directors at the Board of Directors Meeting held March 20, 2025. At the Board of Directors Meeting held May 29, 2025, the Board of Directors approved the name change of the Local Workforce Board from CareerSource Hillsborough Pinellas to CareerSource Tampa Bay. This Action Item will approve changing the organizational name in the Employee Handbook from CareerSource Hillsborough Pinellas to CareerSource Tampa Bay.

Furthermore, in reviewing CSTB's Gift Acceptance Policy, we reviewed the Conflict-of-Interest Policy in the Employee Handbook and during the review noticed an actual dollar value was not identified as an appropriate amount for gift receipt purposes. In working with Stephanie Marchman of GrayRobinson, PA we have reviewed and updated the policy to include a gift receipt dollar value which also aligns with Florida Commerce policy guidance.

#### **Existing Handbook Policy:**

#### **CONFLICTS OF INTEREST**

All employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. An actual or potential conflict of interest occurs when an employee is in a position to influence a decision that may result in a personal gain for that employee or for a relative of said employee as a result of CareerSource Tampa Bay's business dealings. For the purposes of this policy, a relative is any person who is related by blood or marriage, or whose relationship with the employee is similar to that of persons who are related by blood or marriage.

No "presumption of conflict" is created by the mere existence of a relationship with outside business/agencies. However, if employees have any influence on transactions involving purchases, contracts, or leases, it is imperative that they disclose to a supervisor as soon as possible the existence of any actual or potential conflict of interest so that safeguards can be established to protect all parties.

Personal gain may result not only in cases where an employee or relative has significant ownership in a company with which CareerSource Tampa Bay does business, but also when an employee or relative



receives any kickback, bribe, substantial gift or special consideration as a result of any transaction or business dealings involving CareerSource Tampa Bay.

Employees shall not accept any fees or other remuneration (i.e., gifts) from any organization or institution in conjunction with a project or program for which CareerSource Hillsborough Pinellas funds are being sought or have been granted.

**New Paragraph Update – See below with Stephanie Marchman recommendation:**

Employees shall not accept any fees or other remuneration (i.e., gifts) from any organization, institution, or individual in conjunction with a project, program, or service for which CareerSource Tampa Bay funds are being sought or have been granted in excess of \$25.00.

Furthermore, in accordance with Florida Statute 112.313(2): No employee shall solicit or accept anything of value to the employee, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the employee would be influenced thereby.

**Recommendation**

The HR Committee Recommends approval of

- (1) The Employee Handbook name change from CareerSource Hillsborough Pinellas to CareerSource Tampa Bay, and
- (2) The updated language to the Conflicts of Interest policy in the Employee Handbook establishing a defined dollar value limiting the acceptance of gifts to not exceed \$25.00 in value.



## **Action Item**

### **Health Benefit Vendor Selection**

#### **Background**

In September/October 2025, CareerSource Tampa Bay received renewal proposals from our existing Health Benefit Vendors for the 2026 Health Plan Year: United Health Care (UHC) for Medical with an 11.62% increase and UNUM for Dental with a 12% increase and Vision with no increase. UNUM also provides all Life Insurance products with multi-year rate guarantees so there were no price changes for 2026 for these products.

This year was also the first year that we worked with UHC and UNUM for our health benefits and conducted an employee health plan satisfaction survey in June/July of 2025 to get feedback from employees on their experience with both vendors and their products and services. Those results are attached which indicate a higher dissatisfaction than we have had in the past. For United Healthcare, employees indicated a 25% dissatisfaction rate with their health plan and pharmacy benefits and for UNUM, a 7% dissatisfaction rate for dental benefits and 6% dissatisfaction rate for vision benefits.

As a result of the projected increases and employee satisfaction results we had our insurance broker representatives from HUB International, Craig Urquhart, Executive Vice President and Anne Marie Grabetz, Emerging Markets Account Manager for Employee Benefits; present our plans to CIGNA for a pricing proposal for Medical, Dental and Vision coverage. CIGNA proposed a 9.93% increase for Medical, a 9.85% increase for Dental and 2% decrease in Vision. CIGNA also proposed additional plan credits and plan changes that could result in additional medical health plan savings. The comparison proposals are attached.

#### The Market Analysis resulted in the following results:

Medical: Recommending CIGNA, with the most competitive proposal with a 9.93% increase from existing 2025 rates.

Dental and Vision: Recommending CIGNA, with a proposal which included a 9.85% dental premium increase and 2.0% vision plan decrease from existing rates.

Life Insurance Products: No Recommended Changes. Last year UNUM proposed multi-year no rate increase guarantees for life insurance products including Basic Life, Voluntary Life, Short-Term and Long-Term Disability, Critical Illness (Includes Cancer), Hospital Indemnity, and Accident Insurance.

#### **Recommendation:**

The HR Committee recommends approving the selection of CIGNA to provide Medical, Dental and Vision Insurance Plans and UNUM to continue to provide Life Insurance plans to CareerSource Tampa Bay for the 2026 Plan Year.



# CareerSource

## Medical Cost Analysis

### 1/1/2026

<div>HUB</div>						Current / Renewal		Current / Renewal		Current / Renewal		Current / Renewal		
						ECP5 NHP HMO HSA - Fully Insured		ECR7 POS HSA - Fully Insured		DU4H POS - Fully Insured		DUSH POS - Fully Insured		
						United Healthcare		United Healthcare		United Healthcare		United Healthcare		
						In-Network		In-Network		In-Network		In-Network		
Deductible														
Individual Coverage						\$4,500		\$3,300		\$2,000		\$500		
Family Coverage						\$9,000		\$6,600		\$4,000		\$1,000		
Embedded / Non Embedded						Embedded		Embedded		Embedded		Embedded		
Out-of-Pocket Maximum														
Individual Coverage						\$6,500		\$4,500		\$4,000		\$3,500		
Family Coverage						\$13,000		\$9,000		\$8,000		\$7,000		
Coinsurance						90%		80%		80%		90%		
Physician Services														
Preventive Services						Covered at 100%		Covered at 100%		Covered at 100%		Covered at 100%		
Primary Care Visit						Ded. + 10%		Ded. + 20%		20%		\$20		
Specialist Visit						Ded. + 10%		Ded. + 20%		20%		\$20		
Outpatient Diagnostic Services														
Diagnostic Services (e.g., X-rays, Minor Imaging)						Ded. + 10%		Ded. + 20%		Ded. + 20%		Ded. + 0%		
Independent Clinical Lab (e.g., Blood Work)						Ded. + 10%		Ded. + 20%		Ded. + 20%		Ded. + 0%		
Advanced Imaging						Ded. + 20%		Ded. + 20%		Ded. + 20%		Ded. + 10%		
Hospital Services														
Hospital - Inpatient						Ded. + 10%		Ded. + 20%		Ded. + 20%		Ded. + 10%		
Outpatient Surgical						Ded. + 10%		Ded. + 20%		Ded. + 20%		Ded. + 10%		
Urgent Care Visit						Ded. + 10%		Ded. + 20%		Ded. + 20%		\$50		
Emergency Room Visit						Ded. + 10%		Ded. + 20%		Ded. + 20%		\$350		
Prescription Drugs														
Retail Tier 1 (Generic)						\$10		\$10		\$10		\$10		
Retail Tier 2 (Preferred Brand)						\$35		\$35		\$35		\$35		
Retail Tier 3 (Non-Preferred Brand)						\$70		\$70		\$70		\$70		
						Out of Network		Out of Network		Out of Network		Out of Network		
Deductible														
Individual Coverage						N/A		\$5,000		\$3,000		\$1,000		
Family Coverage						N/A		\$10,000		\$6,000		\$2,000		
Embedded / Non Embedded						N/A		Embedded		Embedded		Embedded		
Out-of-Pocket Maximum														
Individual Coverage						N/A		\$10,000		\$6,000		\$6,250		
Family Coverage						N/A		\$20,000		\$12,000		\$12,500		
Coinsurance						N/A		50%		40%		30%		
						Current / Renewal		Current / Renewal		Current / Renewal		Current / Renewal		
Enrollment		Plan 1	Plan 2	Plan 3	Plan 4	United Healthcare		United Healthcare		United Healthcare		United Healthcare		
Employee		38	17	20	23	\$489.57	\$548.92	\$671.96	\$747.76	\$809.59	\$910.04	\$957.84	\$1,061.25	
Employee + Spouse		2	3	2	1	\$1,184.76	\$1,328.39	\$1,626.14	\$1,809.58	\$1,959.21	\$2,202.30	\$2,317.97	\$2,568.22	
Employee + Child(ren)		1	5	4	4	\$884.17	\$991.36	\$1,213.57	\$1,350.47	\$1,462.13	\$1,643.56	\$1,729.88	\$1,926.64	
Family		0	3	3	1	\$1,631.01	\$1,828.74	\$2,238.65	\$2,491.18	\$2,697.17	\$3,031.82	\$3,191.06	\$3,535.57	
Estimated Monthly Premium						\$21,857	\$24,507	\$29,086	\$32,367	\$29,125	\$32,739	\$34,459	\$38,219	
Percentage Change from Current						12.12%		11.28%		12.41%		10.91%		
Monthly Dollar Change from Current						\$2,650		\$3,281		\$3,614		\$3,760		
Total Current Annual Premium						\$1,374,326.76 \$1,533,984.36 \$159,658 11.62%								93
Total Renewal/Proposed Annual Premium														
Annual Dollar Change from Current														
Overall Percentage Change From Current														





						Option 1 HSA OAPIN (38062456) - Level Funded Cigna	Option 2 HSA OAP (38062457) - Level Funded Cigna	Option 3 OAP BASE (38062458) - Level Funded Cigna	Option 4 OAP Buy Up(38062459) - Level Funded Cigna
						In-Network	In-Network	In-Network	In-Network
Deductible									
Individual Coverage						\$4,500	\$3,300	\$2,000	\$500
Family Coverage						\$9,000	\$6,600	\$4,000	\$1,000
Embedded / Non Embedded						Embedded	Embedded	Embedded	Embedded
Out-of-Pocket Maximum									
Individual Coverage						\$6,500	\$4,500	\$4,000	\$3,500
Family Coverage						\$13,000	\$9,000	\$8,000	\$7,000
Coinsurance						10%	20%	20%	10%
Physician Services									
Preventive Services						Covered at 100%	Covered at 100%	Covered at 100%	Covered at 100%
Primary Care Visit						Ded. + 10%	Ded. + 20%	Ded. + 20%	\$20 copay
Specialist Visit						Ded. + 10%	Ded. + 20%	Ded. + 20%	\$20 copay
Outpatient Diagnostic Services									
Diagnostic Services (e.g., X-rays, Minor Imaging)						Ded. + 0%	Ded. + 0%	No Charge	No Charge
Independent Clinical Lab (e.g., Blood Work)						Ded. + 0%	Ded. + 0%	No Charge	No Charge
Advanced Imaging						Ded. + 10%	Ded. + 20%	Ded. + 20%	Ded. + 10%
Hospital Services									
Hospital - Inpatient						Ded. + 10%	Ded. + 20%	Ded. + 20%	Ded. + 10%
Outpatient Surgical						Ded. + 10%	Ded. + 20%	Ded. + 20%	Ded. + 10%
Urgent Care Visit						Ded. + 10%	Ded. + 20%	Ded. + 20%	\$50
Emergency Room Visit						Ded. + 10%	Ded. + 20%	Ded. + 20%	\$350
Prescription Drugs									
Retail Tier 1 (Generic)						\$10	\$10	\$10	\$10
Retail Tier 2 (Preferred Brand)						\$35	\$35	\$35	\$35
Retail Tier 3 (Non-Preferred Brand)						\$70	\$70	\$70	\$70
						Out of Network	Out of Network	Out of Network	Out of Network
Deductible									
Individual Coverage						N/A	\$5,000	\$3,000	\$1,000
Family Coverage						N/A	\$10,000	\$6,000	\$2,000
Embedded / Non Embedded						N/A	Non-Embedded	Non-Embedded	Non-Embedded
Out-of-Pocket Maximum									
Individual Coverage						N/A	\$10,000	\$6,000	\$6,250
Family Coverage						N/A	\$20,000	\$12,000	\$12,500
Coinsurance						N/A	50%	60%	70%
						Option 1	Option 2	Option 3	Option 4
Enrollment		Plan 1	Plan 2	Plan 3	Plan 4	Cigna	Cigna	Cigna	Cigna
Employee		38	17	20	23	\$539.06	\$739.13	\$890.47	\$1,053.39
Employee + Spouse		2	3	2	1	\$1,304.53	\$1,788.71	\$2,154.94	\$2,549.23
Employee + Child(ren)		1	5	4	4	\$973.55	\$1,334.88	\$1,608.19	\$1,902.43
Family		0	3	3	1	\$1,796.16	\$2,479.74	\$2,821.05	\$3,509.93
Estimated Monthly Premium						\$24,067	\$32,045	\$31,890	\$37,897
Percentage Change from Current						10.11%	10.17%	9.49%	9.98%
Monthly Dollar Change from Current						\$2,210	\$2,959	\$2,764	\$3,438
Total Current Annual Premium						\$1,374,326.76			
Total Renewal/Proposed Annual Premium						\$1,510,779.12			
Annual Dollar Change from Current						\$136,452			
Overall Percentage Change From Current						9.93%			



# CareerSource Dental Cost Analysis 1/1/2026

			Current / Renewal UNUM Low Active PPO	Current / Renewal UNUM High Active PPO	Proposal Cigna DPPO Base	Proposal Cigna High Active PPO
			In-Network	In-Network	In-Network	In-Network
<b>Deductible</b>						
	Individual		\$50	\$25	\$50	\$25
	Family		\$150	\$75	\$150	\$75
	Deductible waived for Preventive		Yes	Yes	Yes	Yes
<b>Coinurance</b>						
	Class 1 (Preventive)		0%	0%	0%	0%
	Class 2 (Basic)		20%	20%	20%	20%
	Class 3 (Major)		50%	50%	50%	50%
	Calendar Year Max		\$1,000	\$1,500	\$1,000	\$1,500
	Endo & Perio Benefit		Included (Basic)	Included (Basic)	Included (Basic)	Included (Basic)
	Ortho Max		Not included	\$1,500	Not included	\$1,500
	Waiting Period		None	None	None	None
<b>Deductible</b>			Out of Network	Out of Network	Out of Network	Out of Network
	Individual		\$50	\$25	\$50	\$25
	Family		\$150	\$75	\$150	\$75
<b>Coinurance</b>						
	Class 1 (Preventive)		0%	0%	0%	0%
	Class 2 (Basic)		30%	30%	30%	30%
	Class 3 (Major)		60%	60%	60%	60%
	Calendar Year Max		\$1,000	\$1,500	\$1,000	\$1,500
	Reimbursement		90th Percentile	90th Percentile	90th Percentile	90th Percentile
	Ortho Max		Not included	\$1,500	Not included	\$1,500
<b>Rate Guarantee</b>			1 Year	1 Year	1 Year	1 Year
			UNUM Low Active PPO	UNUM High Active Ppo	Cigna Low Active PPO	Cigna High Active Ppo
<b>Enrollments</b>	<b>Plan 1</b>	<b>Plan 2</b>				
Employee	35	52	\$23.57	\$26.40	\$32.99	\$36.95
Employee + Spouse	2	5	\$52.74	\$59.07	\$73.80	\$82.66
Employee + Child(ren)	7	8	\$47.13	\$52.79	\$70.61	\$79.08
Family	5	12	\$77.45	\$86.74	\$115.32	\$129.16
<b>Estimated Monthly Premium</b>			<b>\$1,648</b>	<b>\$1,845</b>	<b>\$4,033</b>	<b>\$4,517</b>
<b>Percentage Change from Current</b>			<b>12%</b>	<b>12%</b>	<b>9.84%</b>	<b>9.85%</b>
<b>Monthly Dollar Change from Current</b>			<b>\$198</b>	<b>\$484</b>	<b>\$162</b>	<b>\$397</b>
<b>Total Current Annual Premium</b>			<b>\$68,169</b>		<b>N/A</b>	
<b>Total Renewal/Proposed Annual Premium</b>			<b>\$76,352</b>		<b>\$74,881</b>	
<b>Annual Dollar Change from Current</b>			<b>\$8,182</b>		<b>\$6,712</b>	
<b>Overall Percentage Change From Current</b>			<b>12.00%</b>		<b>9.85%</b>	

PLEASE NOTE: This dental cost analysis is intended for comparison purposes only and should not be relied upon to fully determine coverage. The rates illustrated are based on the census data provided to HUB International. They are intended for comparison purposes only and are subject to change. Final rates are contingent upon the results of your firm's final



# CareerSource Vision Cost Analysis 1/1/2026

<div>HUB</div>		Current / Renewal UNUM Vision		Proposal Cigna Vision
		In-Network		In-Network
Plan Design				
Exam Copay		\$10		\$10
Materials Copay				
Frequency of Services				
Eye Exam		once every 12 months		once every 12 months
Lenses		once every 12 months		once every 12 months
Frames		once every 24 months		once every 24 months
Contact Lenses (in lieu of glasses)		once every 12 months		once every 12 months
Covered Lenses by Type				
Single Bifocal Trifocal Lenticular		\$10 copay		\$10 copay
Frames				
		\$150 allowance		\$150 allowance
Contact Lenses (in lieu of glasses)				
		Elective: \$150 allowance; Medical Necessary: Covered		Elective: \$150 allowance; Medical Necessary: Covered
Laser Vision Correction				
		Preferred pricing		Preferred pricing
Rate Guarantee		2 Years		2 Years
		UNUM Vision		Cigna Vision
Rates	Counts			
Employee	98	\$5.62	\$5.62	\$5.51
Employee + Spouse	9	\$11.23	\$11.23	\$11.00
Employee + Child(ren)	16	\$10.68	\$10.68	\$10.46
Family	19	\$16.77	\$16.77	\$16.43
Estimated Monthly Premium		\$1,141	\$1,141	\$1,119
Percentage Change from Current		0.00%		-2.00%
Dollar Change from Current		\$0		-\$23

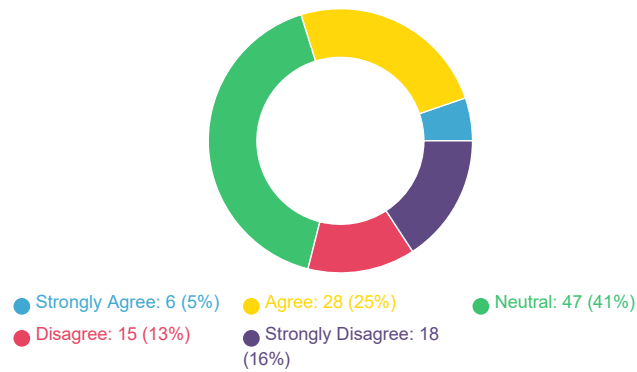
**PLEASE NOTE:** This vision cost analysis is intended for comparison purposes only and should not be relied upon to fully determine coverage. The rates illustrated are based on the census data provided to HUB International. They are intended for comparison purposes only and are subject to change. Final



Other Medical Benefits Comparison		
	CIGNA	UHC
Plan Type:	Level Funded	Fully Insured
Surplus Share:	50%	N/A
Overall Rate Inc.	9.93%	11.62%
*Cigna adding additional 1% Implementation Credit valued at \$15,800.	\$15,800	N/A
Wellness Fund:	\$10,000	\$5,000
Optional Service Fund:	\$2,000	N/A
CIGNA Dental Plan Enhancement:		
Fluoride Treatment Age		
The current Unum plan covers fluoride treatments for children up to age 16. Our standard Cigna offering extends this benefit up to age 19. We will maintain our standard age 19 limit as an <b>enhancement</b> to their current coverage.		
Carryover Benefit Comparison		
<p>The Unum plan includes a <b>carryover benefit</b>, but it is subject to a <b>threshold on claims</b>—members must meet specific criteria (e.g., one cleaning, one exam, and total claims below a set threshold) to qualify.</p> <p>In contrast, our <b>Cigna Dental WellnessPlus Progressive Max</b> feature rewards members for receiving preventive care without any claim threshold requirements. Coverage levels increase year-over-year simply by utilizing preventive services, offering a more straightforward and proactive benefit structure.</p>		

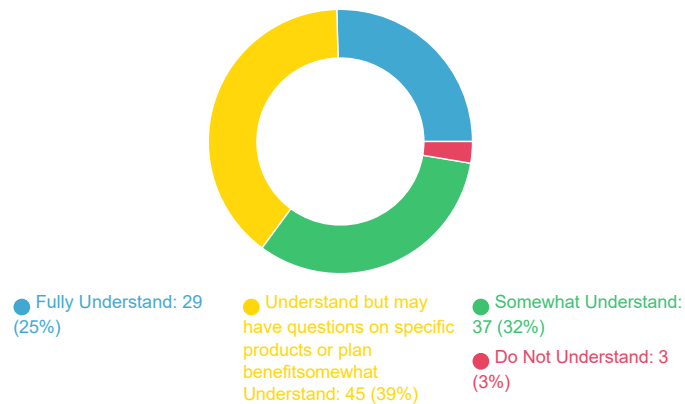
## 2025 Employee Health Plan Satisfaction Survey

1. Overall, I am happy with the choice of United Health Care (UHC) and UNUM health plans provided?



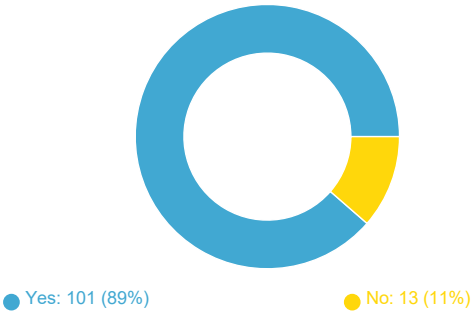
114 responses out of 163 participants (70%)

2. How well do you understand your benefits package?



114 responses out of 163 participants (70%)

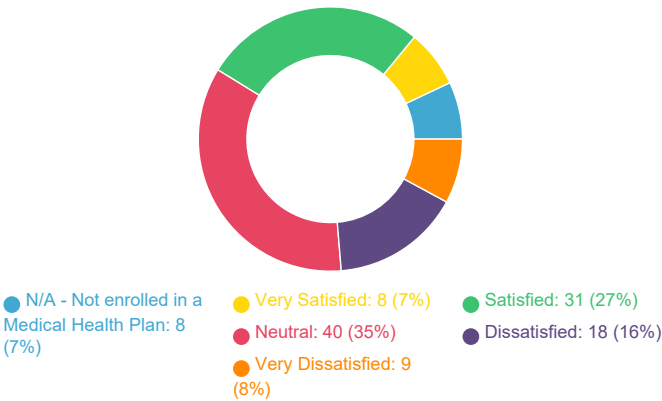
3. Do you know how to get answers to questions about your benefits or benefits offered by CareerSource Tampa Bay?



114 responses out of 163 participants (70%)

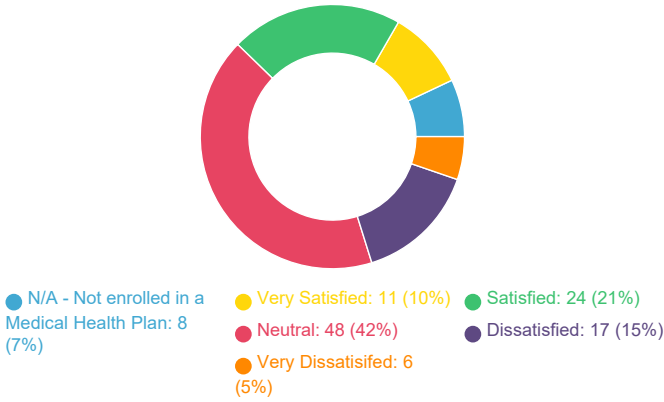
MEDICAL HEALTH PLAN QUESTIONS

4. How satisfied are you with the Medical Health Plans offered through United Health Care? The plans offered are 2 High-Deductible Health Plans - ECP5 NHP HMO HSA and ECR7 POS HSA and 2 Point of Service Plans - DU4H POS and DU5H POS.



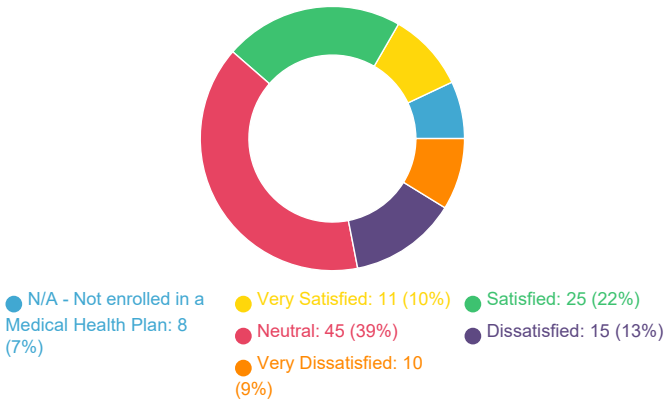
114 responses out of 163 participants (70%)

5. How satisfied are you with the medical plan provider network offered through United Health Care?



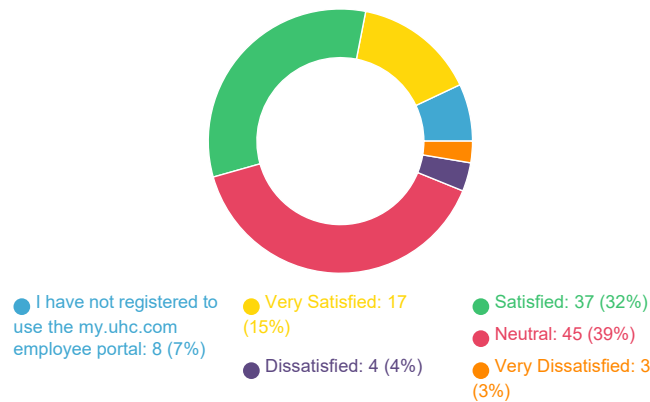
114 responses out of 163 participants (70%)

6. How satisfied are you with the Pharmacy Benefits offered through United Health Care Medical Plans?



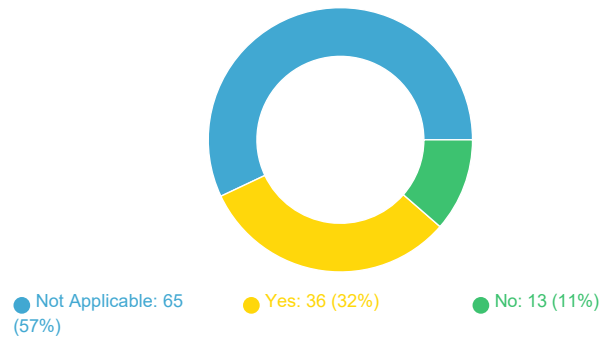
114 responses out of 163 participants (70%)

7. How satisfied are you with the United Health Care Employee Portal - myuhc.com, to find doctors, track and pay bills, review claims and member accounts, get information on coverage and benefits, view and print ID cards, and get information on Pharmacies and Prescriptions.



114 responses out of 163 participants (70%)

8. Do you find the UHC customer service representatives knowledgeable and helpful?



114 responses out of 163 participants (70%)

9. What have you liked or disliked regarding our Medical Plan and Pharmacy Benefits offered through United Health Care?

Item 1

luckily, I haven't use it yet.

Price increases for same medications

Too expensive

co pays high

I have not used it yet.

Not currently using

Does not cover certain medicines (Omega 3 especial)

I loved that I was able to receive my HSA all at once instead of biweekly

I liked that the premiums are reasonable for the buy up plans

previous plan covered a medication UHC does nor or has a higher out of pocket

The copays are reasonable with this company

Needed medication not covered

Longtime doctor is not in the network. I am paying for a higher plan only to keep my current doctor.

I don't like being forced to use email to get the best prices. I like my pharmacy and pharmacist.

I dislike that the out of pocket costs for my appointments and prescriptions have gone up

I would like to see the prices of my medicine go down

At the beginning of every month, UHC denies my wife's claims. If the provider resubmits later in the month, UHC pays the claim. We have been trying for months to fix this issue and have yet to be successful.

NA

Medical plan does not cover enough medications

There is a prescription that I need and the plan benefit don't cover.

It's expensive

Prescriptions previously covered under other plans are not covered.

Haven't used the medical plan yet.

I Have not used the plan

I dislike the limitations especially with the Dentists - I prefer Cigna.

Prescription coverage denials

I can continue with my primary physician

Medication out of pocket costs are three times the amount previously paid if covered

Not approving services requested by my doctors

Not all of doctors have been covered under UHC

Dislike - Price

Very LOW CUSTOMER Satisfaction

Plan benefits for Pharmacy monthly prescriptions went up significantly.

It doesn't cover weight loss procedures or medications..

HSA employer contribution

I do not like they do not anything for weight loss

The plan information is not easy to understand like Cigna was.

n/a

Employee portal is easy to use and navigate

I can only get a one month prescription filled instead of a 90 day supply

N/A

Some of my prescriptions are cheaper using the pharmaceutical companies no insurance cost due to the high deductible. Just thought that was interesting.

I absolutely LOVE the reward opportunities!

If you do not go through UHC preferred provider you cannot get a 90 script, only 30 day. As a result many trips to Pharmacy and results in higher cost to employee.

Dislike - Blood work isn't 100% covered

It's too expensive

cost of plans versus what the plan covers

I does not cover what it says it does

Everything - cost of one of my prescriptions went from \$25 a month to \$500 a month

My medicines are three times more expensive.

The information about the plan is easy to understand

I have extremely disliked having the premiums deducted from my paycheck. I have never worked at a nonprofit that does this.

Not enrolled

Good customer service

Dislike Plan options

Item 2

Different people from UHC telling me different reasons for prescription denials

Amount covered is not great

however it would be nice for doctors to be closer to my home and within my network, many doctors were 2 hours away

The high premiums and high copays have caused me to avoid getting regular preventative care. The plan is kind of useless for me.

I do not like the coverage for preventative care. I feel like the previous plan covered more extra perks (incentives)

The online portal is full of very good information and guidance

I don't feel they are covering my necessary medical expenses until I satisfy my deductible. Our previous insurance with CIGNA I don't feel like they nickel and dimed me on my medical needs.

I dislike that I my doctor I've been seeing over 10 years is not an approved provider

I would like to see my co-pay lowered

NA

That I can have my family on the plan .

I had a family member have to change scripts due to denying existing scrips and going through step therapy. They denied doctor's request and family member became very ill.

deductible is too high

Doctors in network under other plans are not in network.

Noticed I'm paying more for one of my medications. :(

My prescription is affordable

The Co-pays are expensive - more specifically more than Cigna.

Medication previously covered under previous year plans are not covered

Carry own medical and drug plan

Dislike - Dr visits are less expensive

It's to expensive

Pharmacy costs and copays

delay in refill approvals

Deductible higher than prior palm

Dislike - Deductible

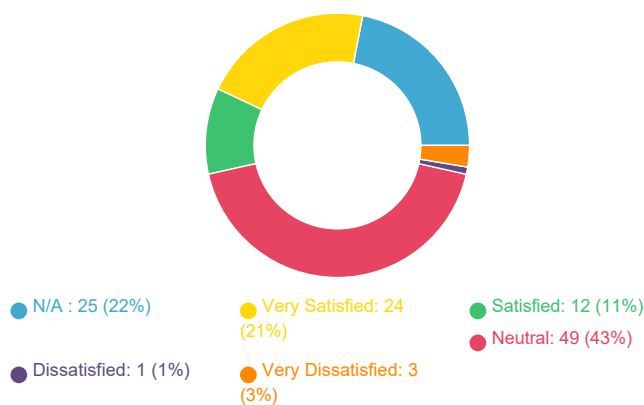
network coverage was not the same as explained during open enrollment

United health care lied about plans

The plans do not cover some of the things that the Cigna plans did.  
 All my doctors were in network  
 High Prizing Coverage  
 Doctor visits always end up with a bill in the mail to pay for what is not covered under a routine visit.  
 Every plan is too expensive for what I make in salary.  
 Laboratory cost was also high - I was charged \$1200 for one procedure  
 Dislike High out-of-pocket costs  
 I get feedback from Doctors that this UHC is the worst insurance to deal with.  
 good network of doctors  
 High deductible  
 Item 3  
 I do not like that the co-pays are so high, even with the buy up plans  
 a lot of medical procedures/tests are not covered by UHC  
 I think the physical should cover both the initial exam visit and the post lab result visit.  
 Like provider network  
 Insurance is a scam.  
 Preauthorization needed for almost every medication  
 Benefit explanation of why I was denied is CRAZY  
 I dislike that I can't afford to get my blood work done because the co pays are outrageous.  
 I do like the ability to find prices on the app. I guess its just getting used to having to shop for the best prices.  
 NA  
 Able to print my ID card  
 Like - prescriptions are less expensive  
 Prefer the healthcare stipend  
 cost of my medications has went down  
 Hsa/fsa  
 The cost of certain medical test/labs/appts cost more  
 I did have to shop around for cheaper pricing on scripts  
 STATISTICALLY SURVEYED & APPROVED, SUPER BAD COMPANY REPUTATION,  
 paper insurance cards  
 The ability to earn rewards is a great idea  
 Item 4  
 Poor service  
 I like their UHC Rewards program  
 Not accepted cost way more than initially quoted  
 HR department is helpful  
 NA  
 I never know what is the best option for me, I don't feel like this insurance plan is looking out for my best financial interests when I use the insurance. Sometimes I'm better off just paying cash and not using the insurance.  
 None  
 Item 5  
 NA  
 I have not had any problems, thus far  
 none  
 VERY LOW PLAN FLEXIBILITY  
 Not accepted

58 responses out of 163 participants (36%)

#### 10. How satisfied are you with the UHC Rewards Program offered through United Health Care where you can earn up to \$1,000 in rewards?

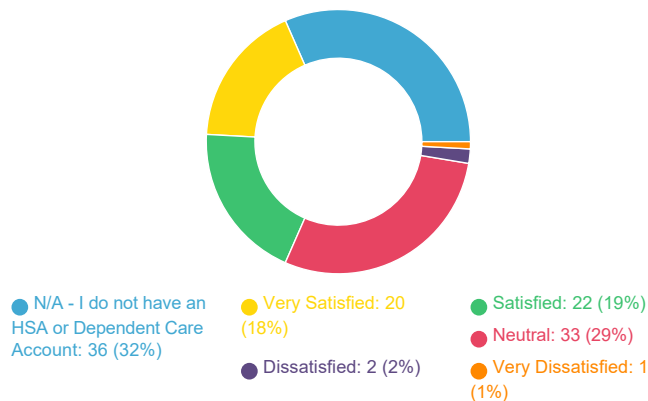


114 responses out of 163 participants (70%)

## 11. What have you liked or disliked regarding the UHC Rewards Program?

Item 1  
 Not enrolled  
 I need to learn about this!  
 Does work  
 my Prescriptions are too expensive  
 The ease to sign up  
 Love the weight management classes offered  
 n/a  
 NA  
 do not like hard to put information on certain rewards  
 How simple it is  
 I can earn monies  
 Don't know how it works yet.  
 It makes me continue working on getting exercise and maintaining me healthy  
 I did not review this feature in detail.  
 N/A  
 time consuming to do get to the rewards  
 Ability to earn extra money and keep healthy  
 HIGHLY DISLIKED DUE TO COMPANY REPUTATION  
 I have not enrolled to this program  
 new for me it has a reward program  
 I would like to have more options to earn rewards faster. I wanted an apple watch but at the rate I am  
 earning rewards could take the entire year to pay it off with using the rewards.  
 time consuming  
 I don't know if I'm on it  
 I liked everything  
 NA  
 Easy to earn  
 I find it confusing and don't use it.  
 What rewards program?  
 NA  
 I'm really not a fan of connecting a tracker  
 not currently using  
 Item 2  
 HIGHLY DISLIKED DUE TO COMPANY REPUTATION  
 Provide new ways to earn rewards every month or milestone within the plan year. Ex 25 rewards points for  
 eating healthy options, or 10 rewards points for taking mindful breaks  
 No clear steps  
 Ability to use the money towards gym memberships, Visa gift Card or other health related items  
 Loves the entire reward system they have in place  
 I do like that if I do it I can transfer the funds to my HSA  
 The multiple opportunities  
 none  
 It's not too easy to earn a high amount  
 NA  
 Item 3  
 Needed to go in depth about the program during the enrollment. Most people do not know what you can do  
 with the rewards (ie. gym membership discount, apple watch)  
 HIGHLY DISLIKED DUE TO COMPANY REPUTATION  
 Provide other options of purchasing items with or using the rewards  
 i have received my e gift card  
 none  
 NA  
 The clarity of each opportunity/task  
 31 responses out of 163 participants (19%)

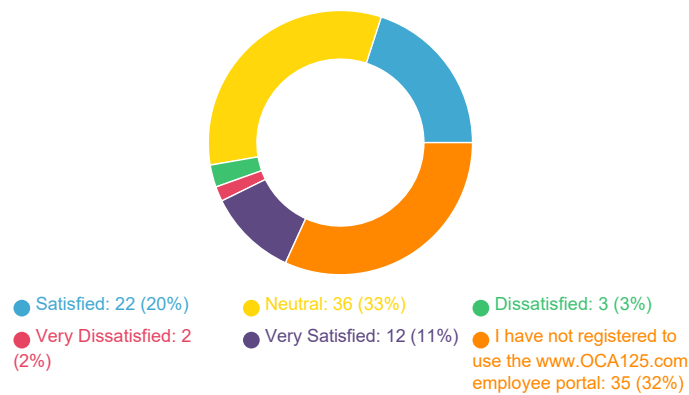
## 12. How satisfied are you with the Health Saving Account and/or the Dependent Care Flexible Spending Account administered by Office of Compliance Administration (OCA)?



114 responses out of 163 participants (70%)



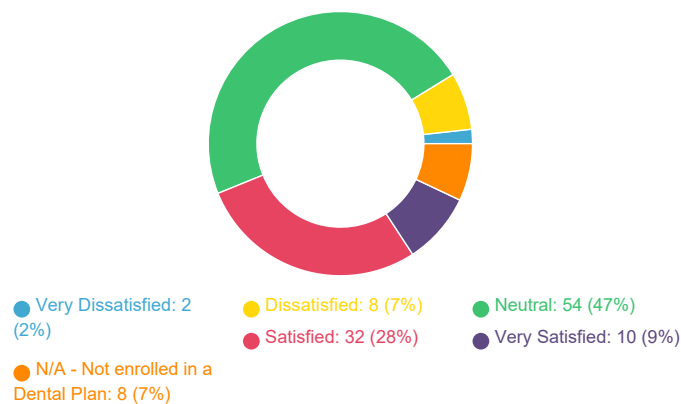
13. How satisfied are you with the OCA Employee Portal - [www.OCA125.com](http://www.OCA125.com), to review account balances, review paid claims and file claim reimbursements.



110 responses out of 163 participants (67%)

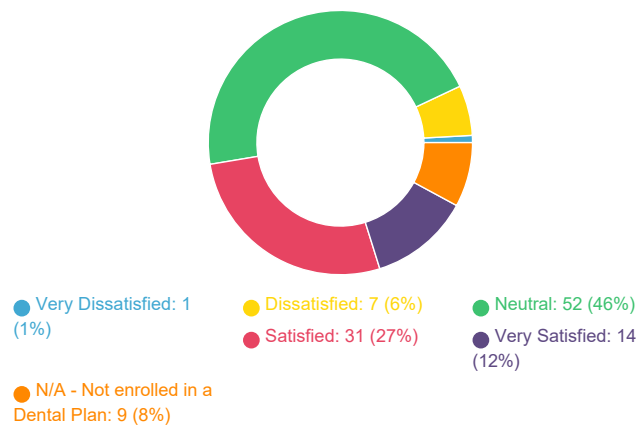
DENTAL AND VISION PLAN QUESTIONS

14. How satisfied are you with our dental plans offered through UNUM?



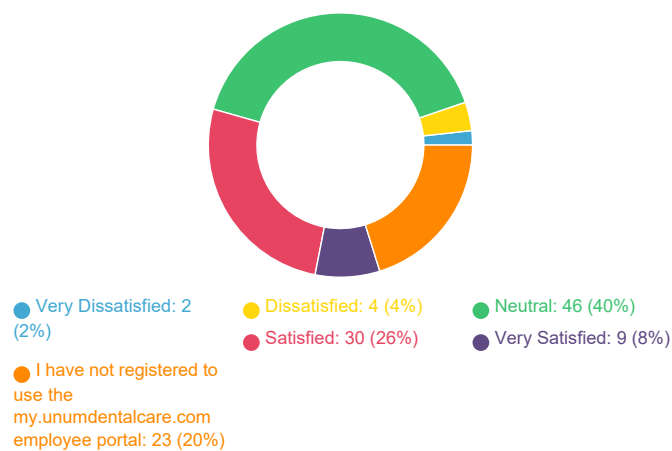
114 responses out of 163 participants (70%)

15. How satisfied are you with the dental plan provider network offered through the UNUM dental plan?



114 responses out of 163 participants (70%)

16. How satisfied are you with the UNUM Employee Portal - myunumdentalcare.com, to find a dentist, review claims and member accounts, get information on coverage and benefits, and view and print ID cards.



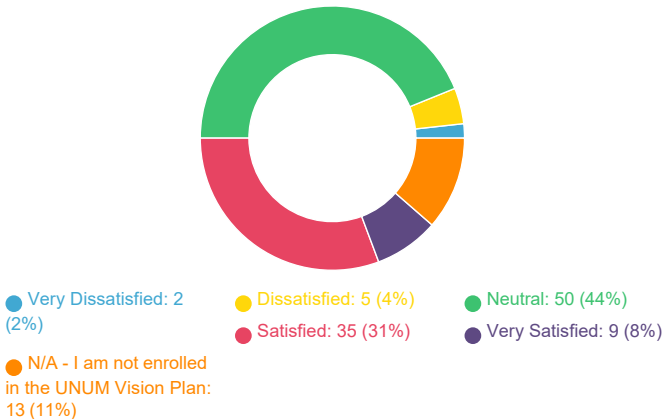
114 responses out of 163 participants (70%)

17. What have you liked or disliked regarding our Dental Plans offered through UNUM?

Item 1  
currently not using  
I recently used my dental insurance and didn't have any issues.  
NA  
I have not been to the dentist appointment yet  
Wish more could be covered  
Same as previous plan  
I have not used the plan  
Nothing  
Coverage seems to be very minimal when needing extensive work done, though that may be normal.  
good plan  
Dislike provider network options  
I have only use it for a regular cleaning.  
No issue. Works as designed  
Have not been able to use it yet.  
Haven't tried yet, I will soon  
I have only used the dental plan for the 6 month cleaning which has been okay so far.  
Have not used it.  
I haven't been able to use it .  
Haven't used it yet.  
n/a  
There are not alot of dentists in the network in the area.  
My dentist isn't a UNUM provider  
n/a  
It's all too confusing. And our plan has changed every year for like the past 5 years.  
Not enrolled  
Item 2  
NA  
none  
I wish they would offer some type of assistance for getting things like invisaline. This could help grinding of teeth according to my dentist but there is no insurance benefit for this procedure.  
Out of pocket expenses  
I do not like the limited providers. Cigna had more providers to use.  
Not alot of pedriatic dentists.  
Carry my own dental  
n/a  
Item 3  
none  
n/a  
NA  
Coverage  
Item 4  
NA  
none  
n/a

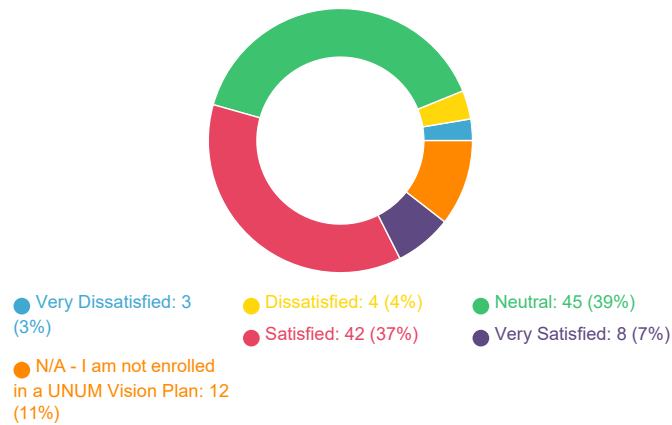
27 responses out of 163 participants (17%)

18. How satisfied are you with our vision plan offered through UNUM?



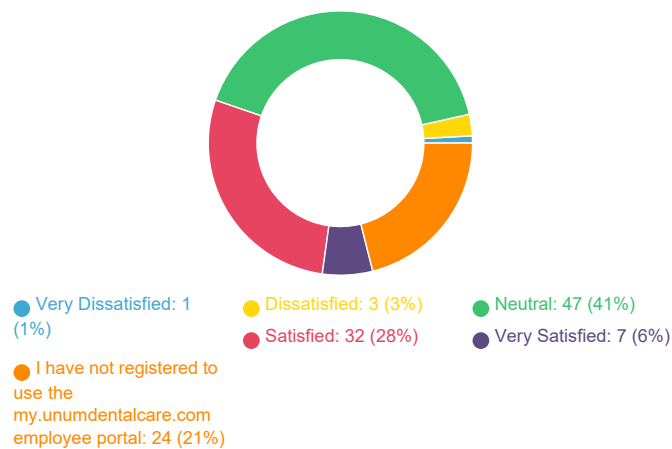
114 responses out of 163 participants (70%)

19. How satisfied are you with our vision plan providers offered through the UNUM network?



114 responses out of 163 participants (70%)

20. How satisfied are you with the UNUM Employee Portal - [www.eyemed.com](http://www.eyemed.com), to find an eye doctor, review claims and member accounts, and get information on coverage and benefits.



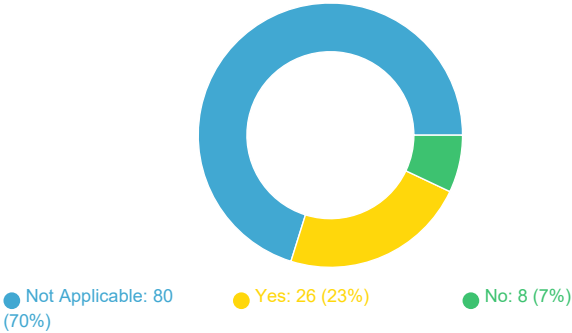
114 responses out of 163 participants (70%)

21. What have you liked or disliked regarding our Vision offered through UNUM?

Item 1  
currently not using  
NA  
When I looked initially I didn't see my longtime eye doctor on the list.  
It's the same as the previous vision career  
Na  
nothing, I used it recently and it covered 150\$ in frames.  
haven't accessed it yet  
Haven't tried yet, I will soon, to be determined soon.  
The providers are limited.  
No issue. Works as designed  
Less coverage than the prior plan. As I understand they will only pay for glasses every other year.  
N/A  
N/a  
I have a scheduled appointment with the doctor but haven't gone yet  
I haven't had the opportunity to use it yet .  
Dislike having to pay so much for new glasses.  
n/a  
I pay alot of money out of pocket.  
Cheaper to pay out of pocket for glasses and contacts at walmart then to go through these expense providers  
n/a  
I haven't used the vision yet, so I do not have a lot of insight.  
Its a very difficult site to get logged into. Not overly user friendly.  
not enrolled  
Nothing  
The benefits are good, but they could be better  
I use the VA  
Item 2  
NA  
none  
The Eye Med website provides information that is easy to understand.  
The locations are limited.  
Carry my own vision  
n/a  
Item 3  
none  
NA  
n/a  
Item 4  
NA  
none  
n/a

27 responses out of 163 participants (17%)

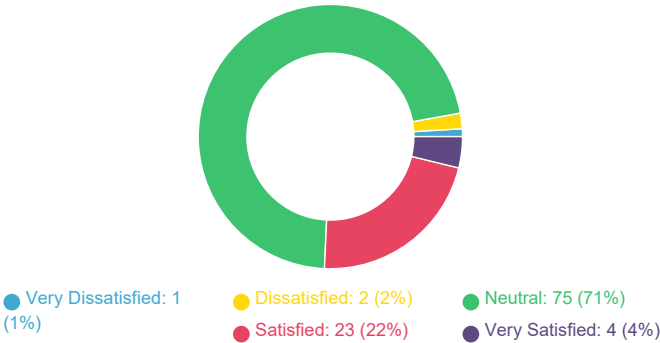
22. Do you find the UNUM customer service representatives knowledgeable and helpful?



114 responses out of 163 participants (70%)

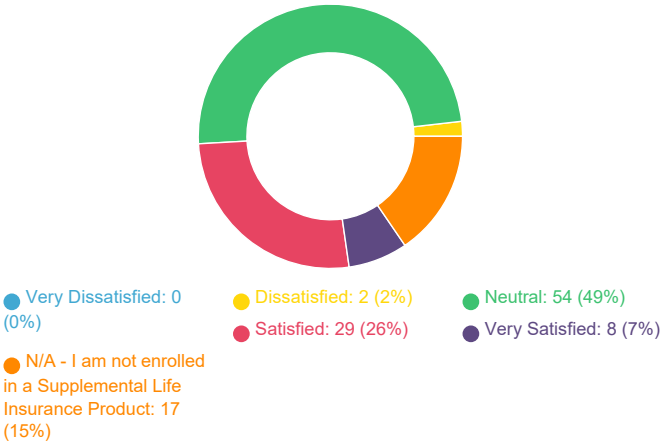
Employee Assistance Plan (EAP) and Voluntary Insurance Plan Questions

23. How satisfied are you with the Employee Assistance Plans (EAP Plans) offered through UHC and UNUM?



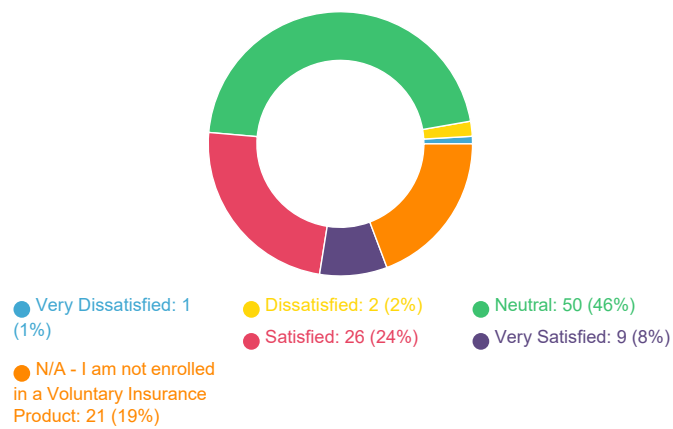
105 responses out of 163 participants (64%)

24. How satisfied are you with the Supplemental Life and ADD Insurance plans offered for Employee, Spouse and Child (employee paid) through UNUM?



110 responses out of 163 participants (67%)

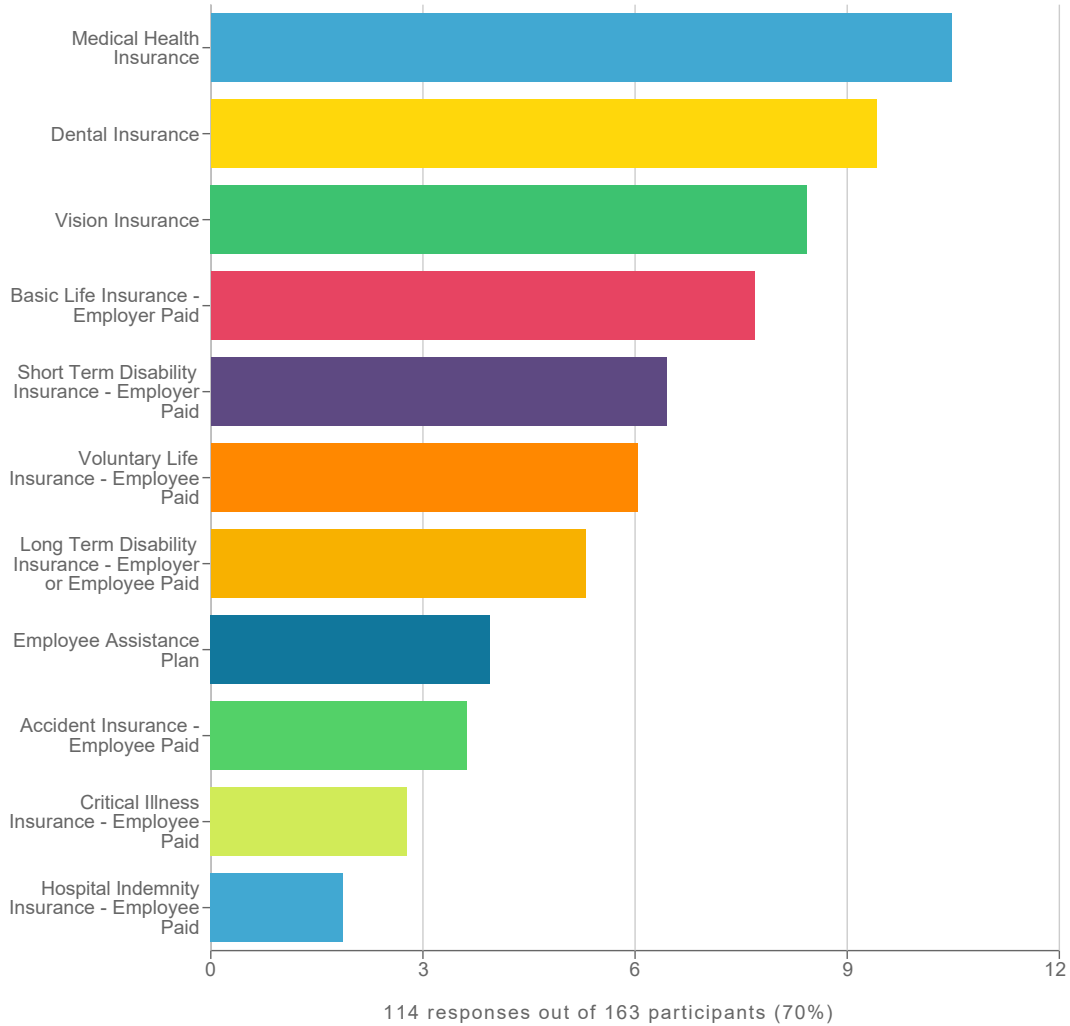
25. How satisfied are you with the Voluntary Insurance plans - Accident Insurance, Critical Illness Insurance and Hospital Indemnity Insurance (employee paid) offered through UNUM?



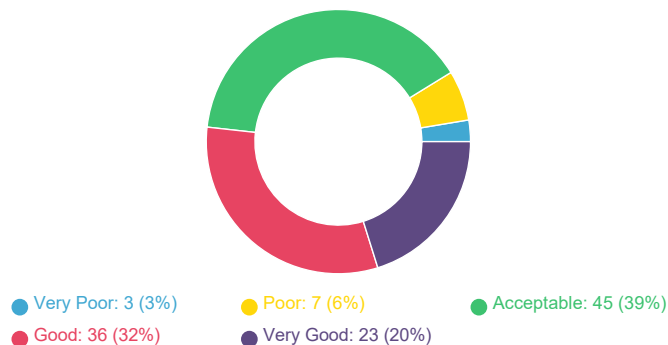
109 responses out of 163 participants (67%)

GENERAL QUESTIONS

**26. Which benefits are most important to you? (Move the items up and down from Most Important to Least Important.)**



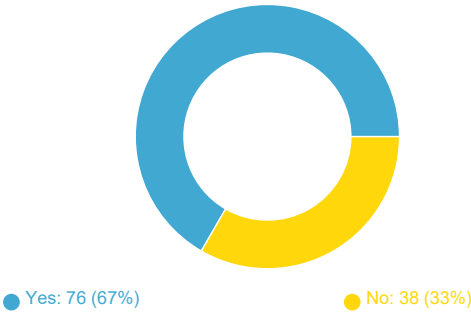
**27. How would you rate the Open Enrollment or Benefit On-Boarding Process (Includes how to navigate the benefit system in Paylocity, the 2025 Benefit Guide, the live or recorded open enrollment webinars and individual product documents provided on the Self-Service Portal) to assist you in your benefit selection.**



114 responses out of 163 participants (70%)



28. Do you feel you have enough time and information to make informed decisions during open enrollment or new hire benefit enrollment?



114 responses out of 163 participants (70%)

**29. Thinking of your experience in the Open Enrollment Process or New Hire Benefit Enrollment Process, what worked well or what could be improved?**

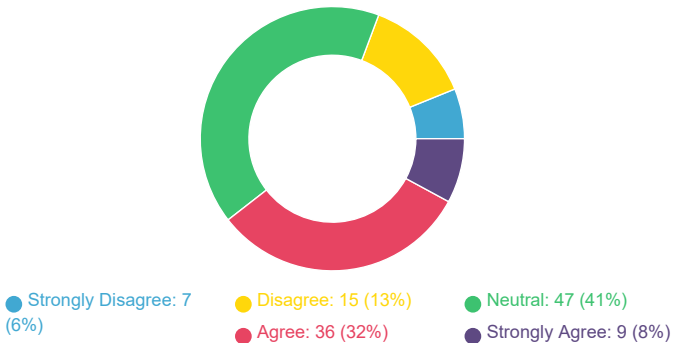
Item 1  
 More time for the enrollment  
 At least one in Person meeting  
 It was a rushed mess  
 I think the Benefit Guide is great. I think the insurance reps could spend a little more time going through each product.  
 More Reminders as a New Hire of your benefits, like REMINDER of when benefits are available and when a SELECTION need to made  
 Providing the benefits guide as early as possible to review  
 open enrollment felt rushed  
 Multiple information sessions have worked well  
 HR Department  
 More time if possible to select.  
 More detailed information regarding the benefits. It was like and overall and there were some that I was unable to understand.  
 I feel open enrollment could be a bit longer but not by much. That is nitpicking  
 The process has been much simpler than before.  
 The webinars are helpful  
 Lots of information provided ie. Benefit Guide, Webinars, account rep accessibility  
 The open enrollment can be more detailed oriented.  
 I would like for it to be ready at the beginning of November so we have more time to research and choose.  
 Barely Competent system  
 webinar  
 it was fine  
 Schedule a set time for new hires to review the pre-recorded Enrollment process.  
 A lower price point.  
 I did not receive the email regarding my accidental insurance I have carried for years, and was unaware I had to directly reach out to provider. As a result, I never received a response and wasn't able to maintain this benefit.  
 it worked well when HR was explaining the different plans offered and also the informational packets about the plans helped  
 NA  
 More time to research the plans  
 It was easy  
 Process is smooth. Organization does a great job of informing employees of the options.  
 I would like another week or two to make a decision  
 Was only given a week to enroll, time should be longer  
 I like the ease of access through the portal  
 has always gone very smooth  
 Item 2  
 Lies told  
 information given at the sessions was not the same as actual coverage and network of doctors  
 Benefits coordinator knowledgeable and helpful in answering question (Barry Martin)  
 Should not have to select my befits 3 times before enrollment is accepted  
 NA  
 I really enjoyed the Town Hall discussion and review  
 I like that a rep comes and explains beforehand  
 Info sessions didn't explain much and the representatives read the packets we had sent to us instead of elaborating.  
 Informational  
 More clear and concise information  
 Multiple emails with information regarding the benefits has been very informative  
 The information and the presenter delivering the information was very beneficial. I liked the examples they used to describe each benefit. Like Hospital Indemnity, I had no clue what this was until it was explained in the webinar.  
 Item 3  
 Easier access to BSWIFT. Like in a tab on top of the page or on the landing page.  
 Reminders have been very helpful  
 none  
 NA  
 Test the portal thought before allowing employees to enroll  
 I like the user friendliness of the portal  
 Item 4  
 NA  
 none  
 Item 5  
 none  
 NA

35 responses out of 163 participants (21%)

30. Are there any benefits that we don't currently offer but you would take advantage of if we did?

Item 1  
Legal Assistance  
Wellness Programs  
NA  
cannot think of any at this time  
Discount programs?  
I would like more investment options on the 401k to buy other assets like bitcoin, gold, commodities and individual stocks.  
Flex program for 4 day work weeks  
not that I can think about  
yes FREE HEALTH CARE  
Gym stipend  
Pet Insurance  
Not that I can think of in this moment.  
wellness / gym membership and or discount  
no  
none  
Gym memberships  
Gym Memberships or Weight Loss programs and/or discounts  
NA  
N/a  
Long Term Care Insurance  
n/a  
pet insurance  
None  
No  
No  
Item 2  
Auto Insurance  
none  
n/a  
More Professional Development Opportunities  
NA  
100% preventive care coverage  
Legal Plan  
Additional sessions for EAP therapy  
0 Tax  
Item 3  
NA  
none  
n/a  
More floating holidays for other religions  
Pet insurance  
0 DEDUCTIBLE  
low out-of-pocket maximums (e.g., \$1,500 for singles)  
Item 4  
none  
n/a  
LinkedIn Premium  
NA  
FREE ALL COVERAGE, NO QUESTIONS ASKED  
Free mental health counseling  
25 responses out of 163 participants (15%)

31. Do you feel your benefits package is competitive compared to similar employers?



114 responses out of 163 participants (70%)

**32. In thinking about your answer to the above question, are there any specific reasons why you feel our benefit package is or is not competitive to other similar employers?**

Item 1  
 none at this time  
 Previous employer coverage cost five times as much out of my pay and covered less overall I do appreciate and enjoy our benefit package. I think its very good  
 The out of pocket costs to get medical care are higher and being able to afford doctor appointments and medication is becoming difficult  
 NA  
 too expensive  
 NA  
 The 401k benefit we have is great  
 this current package is better than the previous healthcare I had in the past which i had very high copays  
 My partner's employer provides similar benefits (health insurance) at a lower cost/lower deductible.  
 The earning up to \$1000.00 reward is amazing  
 Healthcare Unsurance INDUSTRY has done A LOT OF HARM TO ITS CUSTOMERS, INCLUDING ME  
 other carriers also offer similar benefits  
 HSA  
 NA  
 n/a  
 Benefits package is competitive  
 Contributions by the company to the employee's 401k  
 The monthly dental premium is more affordable compared to plans offered by other companies.  
 It is not competitive to one of my last employers but they had one of the best plans.  
 Losing the \$12,000 health stipend has been detrimental  
 I don't like UnitedHealthcare.  
 n/a  
 We need Lower max out of pocket deductibles across all tiers; they went up 2025  
 cost is too high loss of benefit stipend and going with cheapest plan that is fully covered by employer is still making my pay less than it was  
 employee plus spouse benefits way too high for coverage compared to covering a family  
 Pinellas staff were not afforded any benefit after elimination of the benefit stipend and many of us have incurred additional costs due to the changes.  
 No; I hope we keep the plans we have now. at the same rates.  
 I think the amount of products offered and pricing is very competitive and there is a wide array of offerings for health insurance you can select from depending on what you need.  
 the Deductibles are too high can not afford to go to the Doctor.  
 Nothing  
 The company supported benefits are generous, especially the HSA. Having both the STD and LTD are also very appreciate, even though they thankfully have not had to be used.  
 Seems expensive  
 Item 2  
 UHC do not cover a lot of procedures/testing that are required by physicians  
 Would love to see a PTO benefit like EDSI. Everyone starts with 40 hours and has 8 added on every paycheck  
 The HSA 1000.00 employer paid account very beneficial for those who have small children or a lot of medical needs  
 n/a  
 NA  
 My health does not allow me to choose high deductible plans so I was not only unable to take advantage of the HSA but I am paying more out of pocket for my insurance  
 I feel like our insurance was better last year with CIGNA and would welcome its return.  
 I am not aware of what similar employers are offering.  
 Healthcare plans seem quite expensive and deductibles are high no matter the plan choices-it would be interesting to see how the \$10k from the benefit stipend was reallocated into insurance costs  
 Company contributions to benefits expense  
 Missing some physicians I would have liked to have my health services with.  
 401k  
 I prefer Cigna; much simpler  
 Item 3  
 Employer contributions to 401k is excellent. Thank you very much.  
 NA  
 n/a  
 A lot of drug prescription is really high or will not cover such EpiPen (insurance covered only \$5.00)  
 Item 4  
 n/a  
 I would like to see a more detailed list of all medical insurance benefits. Not sure if that's possible.  
 NA

33 responses out of 163 participants (20%)

### Overall Sentiment Analysis

♥ 0.6

27 of 32 questions contributed to this sentiment score.

accepted cost array of offerings approved provider  
 amount covered appointments and medication allowing employees  
 absolutely love afford doctor appointments ability to find  
 alot of dentists actual coverage accidental insurance  
 account rep accessibility answering question  
 amount previously paid affordable compared ability to earn  
 alot of pedriatic additional sessions assets like bitcoin  
 afforded any benefit apple watch avoid getting regular

● Negative    ● Neutral    ● Positive

appointments and prescriptions    appts cost    access to bswift  
approving services requested    account very beneficial  
alot of money    auto insurance



## Action Item

### Bylaw Propose Changes to CSTB Bylaws

#### Background

As outlined in the Interlocal Agreement between Hillsborough County Board of County Commissioners and Pinellas County Board of County Commissioners (Article IV, Authorities and Responsibilities of the Consortium), the Consortium, comprised of two currently serving Commissioners each from both the Hillsborough Board of County Commissioners and Pinellas Board of County Commissioners, must establish the Bylaws of the Hillsborough Pinellas Local Workforce Development Board (LWDB). The authority to establish, amend or replace the Bylaws lies solely with the Consortium.

#### Information

CareerSource Tampa Bay Bylaws Committee met on November 10, 2025, to review the bylaws and approved the following changes. The committee had no further recommendations.

Topic	Bylaw Section	Change
Frequency of board meetings	Section 9.1(A) states, "The Board and Committees of the Board shall meet on a regularly scheduled basis as deemed necessary and appropriate to carry out the responsibilities of the Board or Committee. A calendar of Board and Committee meetings shall be presented to the Board for approval at the annual meeting."	As recommended by Florida Department of Commerce define the frequency of board meetings as follows, the board of directors will meet from time-to-time as it deems necessary and appropriate, but not less than quarterly, to conduct business as may be necessary.
DBA	DBA is noted as CareerSource Hillsborough Pinellas	Throughout Bylaws, change CareerSource Hillsborough Pinellas to CareerSource Tampa Bay
Consortium Chair and 2 <sup>nd</sup> Vice Chair	Section 6.1 Board Officer Positions, Nominations and Elections. 1 <sup>st</sup> paragraph, last sentence:  The 2nd Vice-Chair shall not be from the same County as the Consortium Chair during the same program year	Revise language to allow for same county representation. strike the last sentence in section 6.1 Board Officers Positions, Nominations and Elections, "The 2nd Vice Chair shall not be from the same County as the Consortium Chair during the same program year".
Related Party	Section 10.4 Related Party Contracts, 1 <sup>st</sup> sentence references conflict of interest as section 9.3.	Update reference of Conflict of Interest from section 9.3 to 10.3

**Recommendation:** Bylaws Committee recommends approval of the above changes to bring forth to the Consortium for consideration and approval.

**AMENDED AND RESTATED BY-LAWS**  
**Of**  
**Tampa Bay Workforce Alliance, Inc. d/b/a**  
**CareerSource Hillsborough/Pinellas**  
A Florida Not-for-Profit Corporation

The provisions of this document constitute the By-Laws which shall be utilized to govern the management and operation of Tampa Bay Workforce Alliance, Inc. d/b/a CareerSource Hillsborough/Pinellas a Florida not-for-profit corporation.

**ARTICLE I**  
**DEFINITIONS**

Section 1.1 – Definitions

- A. “Acts” shall mean and refer to the Federal Workforce Innovation and Opportunity Act of 2014, Public Law 113-128 and Florida Workforce Innovation and Opportunity Act of 2000, Chapter 445, Florida Statutes, collectively;
- B. “Administrative Entity” shall mean and refer to the entity designated to serve as support staff to the Consortium and the LWDB and to perform duties such as, but not limited to, administration of the Local Area Workforce Plan, responsible for the allocation of funds, the delivery of performance measured against program objectives, making programmatic decisions, assuring program compliance, ensuring funds are spent in accordance with applicable laws, and operation/management of LWDB contracts, sub-recipient agreements and the one-stop career center(s);
- C. “Board of Directors” or “Board” shall mean and refer to the group of appointees to the LWDB who jointly serve as the governing body of Corporation;
- D. “Consortium” shall mean and refer to the group of elected officials appointed by the respective Hillsborough and Pinellas CEOs to act as the chief local elected officials for the designated Region;
- E. “Consortium Agreement” shall mean that certain Interlocal Agreement between Hillsborough County Board of County Commissioners (HCBOCC) and Pinellas County Board of County Commissioners (PCBCC) as approved by the PCBOCC on November 14, 2023, and the HCBCC on November 15, 2023, as it may be amended from time to time;
- F. “Corporation” or “the Corporation” shall mean and refer to the Tampa Bay Workforce Alliance, Inc. d/b/a/ CareerSource Hillsborough/Pinellas;
- G. “FloridaCommerce” shall mean and refer to the Florida Department of Commerce;
- H. “Fiscal Agent” shall mean and refer to the entity designated to receive and disburse workforce development funds under a sub-agreement directly with FloridaCommerce. It is responsible and accountable for management of all workforce development funds made available to the Local Area. It may also procure, negotiate, and manage contracts;
- I. “Florida WIOA” shall mean and refer to the Florida Workforce Innovation and Opportunity Act of 2000, Chapter 445, Florida Statutes;

- J. "Hillsborough CEO" shall mean and refer to the "chief elected officials" of the Hillsborough County unit of government for the Local Workforce Development Area, which is the Hillsborough Board of County Commissioners;
- K. "Hillsborough County" shall mean and refer to the Hillsborough County Government Administration and Staff;
- L. Local Workforce Development Area ("Local Area") shall mean and refer to a jurisdiction for the administration of workforce development activities and execution of adult, dislocated worker, and youth funds allocated by the State. A jurisdiction must be designated as a Local Area by the Governor in order for the jurisdiction to receive adult, dislocated worker, and youth funding under Title I, subtitle B of WIOA;
- M. Local Workforce Development Board ("LWDB") members shall mean and refer to the appointees by the Consortium who, in partnership with the Consortium, set workforce development policy for the portion of the statewide workforce development system in the Local Workforce Development Area;
- N. "Pinellas CEO" shall mean and refer to the "chief elected officials" of the Pinellas County unit of government for the Local Workforce Development Area, which is the Pinellas Board of County Commissioners;
- O. "Pinellas County" shall mean and refer to the Pinellas County Government Administration and Staff;
- P. "Region" shall mean and refer to the two counties, Hillsborough and Pinellas, served by Corporation;
- Q. "WIOA" shall mean and refer to the Federal Workforce Innovation and Opportunity Act of 2014, Public Law 113-128; and
- R. 4-year Local Area Workforce Plan ("Local Plan") shall mean and refer to the 4-year action plan which sets forth the strategies for the investment of resources to meet the objectives of the various workforce grants and programs including but not limited to the development, alignment, and integration of service delivery strategies in support of the State's vision and strategic and operational goals.

## **ARTICLE II**

### **NAME, SERVICE AREA, AND OFFICE LOCATION**

#### **Section 2.1 – Name**

The legal name of the organization shall be Tampa Bay Workforce Alliance, Inc. d/b/a CareerSource Hillsborough/Pinellas, hereinafter referred to as Corporation.

#### **Section 2.2 – Service Area**

Corporation shall serve the employers and residents of Hillsborough County and Pinellas County, Florida, Region 28.

#### **Section 2.3 – Office Location**

The official office location and mailing address shall be as determined by Corporation Board of Directors.



### **ARTICLE III**

#### **PURPOSE AND USE OF FUNDS**

##### **Section 3.1 – Purpose**

The purposes for which Corporation is formed, and its business goals and objectives, are as follows:

- A. To serve as the LWDB for Region 28 as certified by CareerSource Florida, the State of Florida Workforce Development Board;
- B. To provide a comprehensive and high-quality workforce delivery system in the Local Area and to maximize and continue to improve the quality of services, customer satisfaction, and effectiveness of the services provided;
- C. To deliver customer-focused, value-added workforce solutions designed to meet the specific needs of customers, both employers and job seekers alike;
- D. To administer workforce programs and activities and act as the local grant sub-recipient, administrative entity and fiscal agent as defined by the U.S. Department of Labor, WIOA, authorized by the State of Florida, and in agreement with the Consortium;
- E. To enhance the provision of workforce development services; increase the involvement of the business community, including small and minority businesses, in workforce development activities; to increase private sector employment opportunities; and to ensure the economic health of the community; and
- F. To provide special emphasis to welfare recipients, economically disadvantaged, to include other “barriers to employment”, and Veterans or veteran spouses and individuals and employers needing workforce development services as identified in the Corporation strategic plan.

##### **Section 3.2 – Use of Funds**

Corporation shall use available funding in ways that will most effectively satisfy the labor demand needs of the residents and business community to enhance the economic well-being of the community.

Corporation shall ensure sustained fiscal integrity and accountability for expenditures of funds in accordance with 2 CFR 200 et. seq., WIOA and the corresponding Federal Regulations and State policies, as well as the laws and regulations applicable to such other grant funds or donations received.

No investment, loan or evidence of indebtedness or promise to pay shall be contracted on behalf of Corporation unless authorized and approved by the Corporation Board of Directors and Consortium, and as required, by Federal or State entities.

### **ARTICLE IV**

#### **BOARD OF DIRECTORS**

## Section 4.1 – Governing Body

Corporation shall be governed by a Board of Directors (“Board”), to be appointed by the Consortium, as provided herein.

## Section 4.2 - Appointment of Board Members

- A. The Consortium shall appoint members of the Board consistent with criteria established under the guidelines established in the Consortium Agreement, WIOA, criteria established by the Governor, and in accordance with Hillsborough Board of County Commissioners and Pinellas Board of County Commissioners Policy as amended;
- B. The authority to appoint, reappoint or revoke the appointment of members to the Board lies solely with the Consortium. Members of the Board shall serve at the pleasure of the Consortium and may be removed either with or without cause at any time;
- C. The initial appointment of Business category representatives to the LWDB will be of equal proportion (50/50) between the Counties. Thereafter, the Consortium shall appoint Business category representatives to the LWDB based on a pro rata combination of the equally weighted population, employment, and employer metrics of each County once the Administrative Entity for the Region has been designated;
- D. All other appointments to the LWDB must be of equal proportion (50/50) and in accordance with the Acts and the Interlocal Agreement; and
- E. Unless otherwise precluded by law, the Consortium may remove any Board member at any time by a simple majority vote of the Consortium. Such removal by the Consortium may be with or without cause.

## Section 4.3 – Authority and Responsibilities

All corporate powers shall be exercised by or under the authority of the Board in conjunction with the approval of the Consortium, and the business and affairs of Corporation will be managed under direction of the Board and the Consortium. The Board and Consortium shall direct strategic and operational oversight of Corporation to help develop a comprehensive and high-quality workforce delivery system in the Local Area.

The Board’s general responsibilities shall include, but not be limited to:

- A. Developing and submitting a four-year Local Plan and Regional Plan;
- B. Conducting workforce research and regional labor market analysis;
- C. Convening local workforce development system stakeholders to assist in the development of the Local Plan and in identifying expertise and resources to leverage support for workforce development activities;
- D. Leading efforts to engage employers, a wide range of representatives of industry, government, education, and workforce training in the Local Area;
- E. Leading efforts to develop and implement career pathways;
- F. Leading efforts to identify and promote proven and promising strategies and initiatives for meeting the needs of employers, workers, and jobseekers;

- G. Developing strategies for using technology to maximize the accessibility and effectiveness of the local workforce development system for employers, workers, and job seekers;
- H. In partnership with the Consortium, conducting oversight of the WIOA adult, dislocated worker, and youth programs and the entire local workforce delivery system, ensuring the appropriate use and management of WIOA funds, and ensuring the appropriate use, management and investment of funds to maximize performance outcomes;
- I. Negotiating and reaching agreement on local performance measures with FloridaCommerce and present for Consortium approval, as appropriate;
- J. Negotiating with the Consortium 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 and Administrative Policy 106 – Memorandums of Understanding and Infrastructure Funding Agreements;
- K. Selecting providers of youth workforce investment activities through competitive grants or contracts in accordance with Administrative Policy 120 – Youth Service Provider Selection; providers of training services consistent with state policy and WIOA sec. 122; providers of career services through the awards of contracts in accordance with Administrative Policy 083 – Direct Provider of Workforce Services; and one-stop operators in accordance with 20 CFR 678.600 through 20 CFR 678.635 and Administrative Policy 097 – One-Stop Operator Procurement;
- L. Working 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;
- M. Coordinating activities with education and training providers in the Local Area;
- N. Developing a budget for the activities of the Board, with approval of the Consortium and consistent with the four-year Local Plan and the duties of the Board;
- O. Assessing, on an annual basis, the physical and programmatic accessibility of all career 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.);
- P. Certifying the Local Area's career centers in accordance with 20 CFR 678.800 and Administrative Policy 093 – One-Stop Delivery System and One-Stop Center Certification Requirements;
- Q. Concluding agreements necessary to designate the fiscal agent and administrative entity. A public or private entity, including an entity established under section 163.01, F.S. which makes a majority of the appointments to the Board may serve as the Board's administrative entity if approved by FloridaCommerce based upon a showing that a fair and competitive process was used to select the administrative entity;
- R. Providing ongoing oversight related to administrative costs, duplicated services, career counseling, economic development, equal access, compliance and accountability, and performance outcomes;
- S. Overseeing the one-stop delivery system in the Local Area;

- T. In partnership with the Consortium, establishing bylaws and codes of conduct for Board members, as well as the Director and Board staff;
- U. Establishing additional monitoring and reporting requirements, if one entity fulfills multiple functions, to ensure the entity is compliant with WIOA, final rules and regulations, OMB Uniform Guidance and applicable circulars, and the state's conflict of interest policy; and
- V. Completing new Board member orientation and annual training requirements within the required timeframes.

A full list of Board functions can be found in WIOA sec. 107(d), 20 CFR 679.370 and section 445.007, F.S.

#### Section 4.4 – Powers Regarding a Director and Staff

The Board shall have the power to select and recommend a Director, Interim Director, or designated person(s) responsible for the operational and administrative functions of Corporation subject to final approval by the Consortium. The Director shall be a contract employee of Corporation, shall report to the Board, and shall be responsible to hire sufficient personnel to carry out effective and efficient operation of workforce development programs as defined in the Local Plan and to provide necessary technical assistance to any sub-grantees providing services under the guidance of Corporation and acting in partnership with the Consortium as provided herein.

The Board shall ensure the individual designated as the Director has the requisite knowledge, skills, and abilities to meet identified benchmarks and to assist in effectively and ethically carrying out the functions of the Board which include, but are not limited to:

- A. Coordinating with the Consortium regarding the identification and nomination of members to the Board and ensuring membership is compliant with WIOA and Florida Statutes;
- B. Organizing Board meetings and ensuring meetings are held according to the Board's bylaws and Florida's Government-in-the-Sunshine Act;
- 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 the Consortium and FloridaCommerce;
- F. Ensuring the outcomes of local performance measures are provided to the Board members and Consortium no less than semi-annually.
- G. Negotiating with Consortium 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 activities of the Board;
  - 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 Board members, Board Chair, and Consortium within five (5) business days of receipt.

The Board shall have the authority to suspend, with or without pay, or remove the Director, Interim Director, or the designated person(s) responsible for the operational and administrative functions of Corporation with or without cause. The Consortium shall have the authority to direct the Board to suspend, with or without pay, or remove the Director, Interim Director, or the designated person(s) responsible for the operational and administrative functions of Corporation for cause. Upon receipt of the Consortium's direction, the Board shall provide written notice to the Director, Interim Director, or designated person(s) of the termination of his or her employment, specifying the date on which the Director, Interim Director, or designated person(s) responsible for the operational and administrative functions of Corporation employment shall terminate.

The Board shall conduct regular performance reviews, at a minimum annually, for the 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 Director's effectiveness in ensuring workforce investment activities carried out in the local area enable the local area to meet the corresponding performance accountability measures and achieve fiscal integrity as defined in WIOA sec. 106(e)(2). The performance review must be provided to and reviewed by the Consortium.

Corporation shall provide or arrange for annual training to Board members to ensure they are aware of their roles, responsibilities, and functions to include an orientation and training for new Board members and periodic updates as needed.

The Director and staff of Corporation shall be subject to the limitations on the payment of salary and bonuses as described in WIOA sec. 194(15) and 2 CFR § 200.430.

#### Section 4.5 – Powers Regarding Legal Counsel

The Board shall have the power to select and recommend Legal Counsel for the provision of advice, support, and guidance on legal services to the Corporation for Consortium approval. The Consortium must approve the process for the Board to select Legal Counsel. The Legal Counsel shall report to the Board, shall provide and be responsible for provision of legal services, and give updates at Board meetings, as requested.

The Board shall have the authority to terminate the Legal Counsel with or without cause. The Consortium shall have the authority to direct the Board to terminate the Legal Counsel for cause. Upon receipt of the Consortium's direction to terminate the Legal Counsel, the Board shall provide written notice to the Legal Counsel, of the termination, specifying the date on which the Legal Counsel's contract shall terminate.

#### Section 4.6 – Authority of Individual Board Members

Board members have authority over the affairs of Corporation only when acting as a Board of Directors legally in session. The Board shall not be bound in any way by any action or statement on the part of any individual Board member except when such statement or action is taken when carrying out specific instructions by the Board.

Board and Committee members shall direct any such requests for comment to the Board Chair and/or Director of Corporation. The Board Chair and Director of Corporation are designated as the official spokespersons for Corporation.

#### Section 4.7 - Categories of Board Membership

Consistent with criteria set forth by the U.S. Department of Labor, WIOA, the State of Florida, and Florida WIOA, Board member composition shall be in accordance with the following categories:

- A. Business: These shall be individuals who are business owners, chief executives or operating officers, employers or other individuals with optimum policymaking or hiring authority, provide employment opportunities that include high-quality, work-relevant training and development in in-demand industry sectors or occupations, and are nominated by business organizations or business trade associations. In the event of a difference between the guidance provided in 20 CFR 679.300 and this provision, the regulation will control. A majority of the members of the Board must be representatives of business in the local area. At a minimum, two (2) members must represent small business as defined by the U.S. Small Business Administration.
- B. Workforce: These shall be representatives of local labor organizations nominated by local labor federations, members of a local labor organization or a training director from a joint labor-management apprenticeship program, or if no joint program exists an individual from an apprenticeship program, may include community based organizations that have demonstrated experience and expertise in addressing employment needs of individuals with barriers, including organizations that serve veterans or individuals with disabilities, and out of school youth. If there is only one (1) representative of local labor organizations on the Board then that representative shall alternate between the County of representation every term. Workforce sector representatives shall constitute a minimum of twenty percent (20%) of the total Board.
- C. Education and Training: Representatives shall include providers administering adult education and literacy activities under WIOA Title II, institutions of higher education providing workforce investment activities (including community colleges and private education providers), may include local educational agencies and community-based

organizations with expertise in education and training of individuals with barriers to employment. If there is only one (1) representative of public education and one (1) representative of private education on the Board then those representatives shall alternate between the two (2) Counties of representation every term.

- D. Government, Economic/Community Development: Representatives of governmental, and economic and community development entities; economic and community development entities serving the Local Area, State Employment office/Wagner-Peyser Act 29 U.S.C. 720 et seq, WIOA Title I of rehabilitation act of 1973, may include agencies representing transportation, housing, public assistance, philanthropic organizations or representatives of entities or individuals as the Consortium determines to be appropriate. Government representatives shall include the County Administrator or designee from each County and one (1) Commissioner from the Hillsborough CEO and one (1) Commissioner from the Pinellas CEO that are currently serving on the Consortium. Such appointments of Commissioners to be consistent with their respective Board appointment processes. If the County Administrator designee is a local government representative, then the local government representative may alternate between the local governments within their County of representation every term.
- E. All Board members or their alternative designee shall be individuals with optimum policymaking authority within the organizations, agencies, or entities. A representative with optimum policymaking authority is an individual who can reasonably be expected to speak affirmatively on behalf of the entity he or she represents and to commit that entity to a chosen course of action.
- F. An individual may be appointed as a representative of more than one (1) membership area if the individual meets all criteria for such representation. If an individual represents more than one membership area, he or she must be appropriately nominated by the organization or entity he or she will represent and must have optimum policymaking authority within each membership area represented. Individuals representing more than one (1) membership area shall be determined and appointed by the Consortium. Nominees shall represent the urban and suburban nature as well as the demographic, ethnic, and gender characteristics reflective of the Local Area.

#### Section 4.8 - Qualifications

Members of the Board shall be U.S. citizens or permanent residents, and residents and registered voters of the Counties of representation. The residency and voter registration requirements may be waived for members of required seats by the Consortium. Business sector representatives must be employed by a business that is located in the County of representation.

#### Section 4.9 – Financial Disclosure

Each Board member who is not otherwise required to file a full and public disclosure of financial interests under Art. II, Section 8 of the Florida Constitution or under Chapter 112 of the Florida

Statutes shall, within thirty (30) days of appointment to the Board, annually thereafter, and upon completion of their term on the Board shall file a statement of financial interests.

#### Section 4.10 - Compensation

The Board members shall serve without compensation. Board members may be reimbursed for reasonable and necessary expenses incurred when traveling on official business of Corporation if approved in advance, consistent with the adopted travel policy. Such reimbursement shall be pursuant to Chapter 112 Section 061 Florida Statutes and Corporation policies.

#### Section 4.11 - Notification of Vacancies

The Board Chair or the Director will notify the Consortium when Board vacancies occur through written correspondence to the Consortium Chair and provide a copy to the County's Local Workforce Development Board Liaison.

### **ARTICLE V** **BOARD MEMBERSHIP**

#### Section 5.1 – Terms of Membership

- A. The term of membership for Members of the Board shall be the same as the Corporation's program year (July 1 – June 30);
- B. Members of the Board shall serve for fixed and staggered terms of two (2) years with the exceptions described herein. The initial Board appointments were staggered between one (1) and two (2) year terms to establish only a portion of the memberships expiring each year;
- C. Members of the Board may not serve as a Board member for more than eight (8) consecutive years unless such member is a representative of a governmental entity. If a Member of the Board is appointed to serve the remainder of an unexpired term, then such service shall count towards the Member's eight (8) year limit. Terms previously served on Hillsborough County or Pinellas County Local Workforce Development Boards do not count toward the eight (8) year limit. A Member may not start another term where the eight (8) consecutive years limit will be reached during such term;
- D. The term of office for the respective Commissioners serving on the Consortium and the respective County Administrator or County staff designee are not subject to the terms of membership specified herein;
- E. In accordance with WIOA and Florida WIOA, whenever a designated seat on the Board must be filled by an individual occupying a specific position in an organization, agency or institution, the term of office for that seat is not subject to the terms of membership specified herein; and
- F. If a Board member resigns prior to his or her term end date or ceases to represent the category to which they were appointed, they shall be considered as having de facto resigned, and applications for filling the vacancy shall be received in accordance with



the application process set forth by the Consortium. Upon appointment, the new member shall serve the remainder of the unexpired term of the member whose vacancy he or she is filling.

## Section 5.2 – Attendance

Board members are required to attend at least fifty percent (50%) of the Board meetings in any one program year (July – June).

Board members shall notify the Director of Corporation or designee within a reasonable time in advance of the meeting if they will not be able to attend a Board meeting in order to obtain an excused absence. Board members shall notify the Director of Corporation or designee within a reasonable time in advance of the meeting if an alternative designee will attend, see Section 4.7(E). Committee members shall notify the Committee Chair or designee if they will not be able to attend a Committee meeting in order to obtain an excused absence. Designees do not have the right to vote or be counted for purposes of attendance or quorum.

## Section 5.3 – Resignation of Membership

A Board member may resign his or her membership on the Board at any time by submitting a resignation in writing to the Board Chair or Director. In the case of the resignation of the Board Chair, a resignation shall be submitted in writing to the Consortium Chair, the Director, and the Board Vice Chair. A resignation shall become effective upon the date specified in such notice, or, if no date is specified, upon receipt of the resignation by the Director or Consortium Chair, unless Section 5.1(D) is applicable.

Three (3) unexcused absences in any one program year (July 1 – June 30) from regularly scheduled Board meetings shall constitute a de facto resignation of the Board member. Three (3) unexcused absences in any one program year (July 1 – June 30) from regularly scheduled Committee meetings shall constitute a de facto resignation of the Committee member from that Committee. De facto resignation from a Committee will not impact the individuals' membership on the Board or membership on other Committees.

## Section 5.4 – Revocation of Membership

The Board Chair may recommend revocation of Board membership to the Consortium Chair, including for, but not limited to, the following reasons:

- A. A member's disability, illness, or inability to perform their duties on the Board; or
- B. Failure to carry out duties, responsibilities, and functions of a Board member as defined in federal and state law, regulations, and these Bylaws; or
- C. Unethical or illegal practices or actions

## **ARTICLE VI** **BOARD OFFICERS**

## Section 6.1 - Board Officer Positions, Nominations and Elections

The Board Officers of Corporation shall consist of a Chair, a Vice-Chair, a 2<sup>nd</sup> Vice-Chair, a Secretary, and a Treasurer. The Chair and Vice-Chair shall not be from the same County of representation during the same program year. The 2<sup>nd</sup> Vice-Chair shall be chosen from the Hillsborough CEO and Pinellas CEO and shall alternate between the County of representation every one (1) year term. The 2<sup>nd</sup> Vice-Chair shall not be from the same County as the Consortium Chair during the same program year.

The Chair, Vice-Chair, Treasurer, and Secretary of Corporation shall be nominated and elected as follows:

- A. A slate of nominees for Officers shall be presented to the Board by the Nominating Committee and selected based upon a majority vote of the quorum present at Corporation annual meeting, except as otherwise directed by the full Board. Prior to voting on the slate of nominees, nominations shall be accepted from the floor.
- B. The annual meeting at which the slate of Officers shall be elected shall take place in May, or on a date as otherwise set by the Board, and the Officers shall take office in July, or on a date as otherwise set by the Board.
- C. The Chair and Vice-Chair shall be selected from among the representatives of the business sector Board members. The Treasurer and Secretary shall be selected from among any category of Board membership.

## Section 6.2 – Duties of Board Officers

- A. Duties of the Chair shall include:
  - Leading the Board to develop a guiding vision that aligns with the state's priorities;
  - Acting as the lead strategic convener to promote and broker effective relationships between the Consortium and economic development, education, and workforce partners in the Local Area;
  - Reviewing Board directives with the Director of Corporation to ensure compliance and implementation;
  - Presiding at all meetings of the Board;
  - Calling special meetings of the Board;
  - Serving as a signatory for Corporation financial and legal documents;
  - Serving as a member of the Audit Committee;
  - Appointing members to the Education and Industry Consortium;
  - Providing the annual performance review of the Director to the Board and Consortium;
  - Appearing before the state workforce development board (State Board) to discuss the performance of the Board, upon the request of the State Board; and
  - Performing all duties incident to the office of Chair.
- B. Duties of the Vice-Chair shall include:
  - Presiding over meetings of the Board in the absence of the Chair; and
  - Performing all duties incident to the office of Chair in the absence of the Chair.

C. Duties of the 2<sup>nd</sup> Vice Chair shall include:

- Presiding over meetings of the Board in the absence of the Chair and Vice-Chair;
- Serving as a member of the Audit Committee; and
- Performing all duties incident to the offices of Chair and Vice-Chair in the absence of the Chair and Vice-Chair.

D. Duties of the Treasurer shall include:

- Serving as Chair of the Audit Committee;
- Serving as a signatory for Corporation financial and legal documents;
- Making a report on the financial status at each regular meeting of the Board; and
- Performing all duties incident to the office of Treasurer.

E. Duties of the Secretary shall include:

- Signing all bank resolutions;
- Serving as a signatory for Corporation financial and legal documents;
- Reviewing all Board minutes prior to official adoption by the Board of Directors; and
- Performing all duties incident to the office of Secretary.

### Section 6.3 – Terms of Board Officers

The term of office for the Board Chair, Vice-Chair, Treasurer and Secretary shall be for one (1) full year, from July 1 through June 30.

Board Officers shall serve no more than two (2) consecutive terms of one (1) year each in the same office, if re-elected, provided that the time in office does not exceed the limits of their term of membership on the Board. After two (2) consecutive terms, the Officer shall then step down from their position for a minimum of one (1) year, although he or she may continue to serve as a Board member, or in another office. A member of the Board shall not serve more than two (2) terms in the Board Chair position. Additionally, the Board Chair may not simultaneously act as the employed Director/Chief Executive Officer or Chief Financial Officer of the Board while in position as the Board Chair.

The time which an Officer is appointed to serve the remainder of an unexpired term shall not count towards the Officer's two (2) consecutive terms.

The 2<sup>nd</sup> Vice-Chair is not subject to the Officer term limits specified herein.

### Section 6.4 – Vacancy in One of the Officer Positions

If a vacancy in any office other than the Chair occurs due to the illness, resignation, etc. of the Officer elected, a replacement shall be elected to serve the unexpired term of office at the next regularly scheduled Board meeting where a quorum is established. If the office of Chair becomes vacant, the Vice-Chair will assume the office of Chair for the remainder of the unexpired term. The office of Vice-Chair will then be filled at the Board's discretion.

## **ARTICLE VII**

### **BOARD COMMITTEES**

#### **Section 7.1 – Standing Committees**

The Board shall create an Audit Committee and have the ability to create, expand, or combine additional Standing Committees to carry out the functions of the Corporation as determined necessary for the efficient operation of Corporation. The Consortium shall have the right to approve/appoint one (1) to two (2) non-Board members to the Audit Committee. All created, expanded, or combined Standing Committees shall have identified names, membership, duties and responsibilities. The Board Chair shall name a Committee Chair for each Committee from among the members of the Committee who are also members of the Board of Directors. Each Committee may meet at the call of its Chair or at the direction of the Board of Directors but shall meet at least quarterly. Standing Committees may include non-Board members, but the Chair and Vice Chair of all Committees shall be members of the Board. All standing committees shall have a charter approved by the Board.

The Consortium may create, expand, or combine Standing Committees as determined necessary for the efficient operation of Corporation.

#### **Section 7.2 – Ad Hoc Committees**

The Chair may appoint Ad Hoc Committees as deemed necessary.

#### **Section 7.3 – General Guidelines of Committee Membership**

- A. All Committees shall be chaired by a Board member appointed by the Board Chair and Board members shall comprise a majority of each Committee;
- B. All Board members are required to serve on at least one (1) Standing Committee as determined and appointed by the Board Chair; and
- C. A Committee member, with the exception of a Board member, may designate an alternate in writing who shall have the powers, excluding voting, of the committee member when that alternate attend committee meetings in lieu of the committee member. No committee member or delegate may vote through proxy.

#### **Section 7.4 - Audit Committee Membership, Duties and Responsibilities**

The Audit Committee shall consist of the Board Chair, 2<sup>nd</sup> Vice-Chair, Treasurer, and may include one (1) to two (2) non-Board members if approved/appointed by the Consortium. No employee of Corporation shall serve on the Audit Committee but may serve as staff to the Audit Committee. Corporation's Finance Director shall serve as primary staff to the Audit Committee. The Audit Committee shall be responsible for:

- A. Making recommendations to the Board on the selection of an independent auditor, including terms of engagement and compensation;

- B. Overseeing the annual financial audit of any and all programs operated by Corporation in compliance with 2 CFR Part 200 subpart F, including approving annual audit plans;
- C. Reviewing the annual financial audit and recommending responses to any adverse findings thereto to the Board;
- D. Authorizing and procuring Performance audits as defined by Sec 11.45, Florida Statutes, to be performed by independent firms or the Division of Inspector General, Clerk of the Circuit Court and Controller, subject to ratification by the Board;
- E. Reviewing audits and reports on the monitoring of activities, operations and expenditures under the programs operated by Corporation and reporting findings and making recommendations on corrective actions to the Board;
- F. Reviewing such other interim or annual reviews and reports, whether conducted by an audit firm, entities expert in evaluation and/or monitoring of Corporation programs or county staff as determined by the Audit Committee and reporting findings and making recommendations on corrective actions to the Board;
- G. Reviewing and recommending for Board acceptance of the annual financial audit and 401(k) plan audit;
- H. Reviewing and recommending for Board acceptance of the annual IRS Form 990 submission; and
- I. Reviewing internal and external financial monitoring reports performed by Corporation, U.S. Department of Labor, FloridaCommerce, and others as deemed appropriate.

## **ARTICLE VIII**

### **EDUCATION AND INDUSTRY CONSORTIUM**

#### **Section 8.1 – Education and Industry Consortium**

The Board must create an Education and Industry Consortium composed of representatives of educational entities and businesses in the designated service delivery area. The Education and Industry Consortium must provide quarterly reports to the Board which provide community-based information related to educational programs and industry needs to assist the Board in making decisions on programs, services, and partnerships in the service delivery area. The Board will consider the information obtained from the Education and Industry Consortium to determine the most effective ways to grow, retain, and attract talent to the service delivery area. The Board Chair will appoint the Education and Industry Consortium members for two-year terms beginning on January 1 of the year of appointment, and any vacancy must be filled for the remainder of the unexpired term in the same manner as the original appointment. A member of the Board may not serve as a member of the Education and Industry Consortium.

## **ARTICLE IX**

### **MEETINGS**

#### **Section 9.1 – Meeting Frequency, Location, Notices, Minutes, Participation and Parliamentary Procedures**

- A. The Board and Committees of the Board shall meet on a regularly scheduled basis as deemed necessary and appropriate to carry out the responsibilities of the Board or Committee. A calendar of Board and Committee meetings shall be presented to the Board for approval at the annual meeting.
- B. Meetings of the Board and Committees of the Board shall be held at locations determined by the members.
- C. The Director of Corporation or designee shall notice all Board and Committee members of meetings by email, telephone, or any other electronic means at least seven (7) days in advance. These notices shall contain the meeting date, time, location, and identify the agenda items.
- D. Special meetings of the Board or Executive Committee may be called at any time by the Board Chair or by written request to the Board Chair of not less than twenty-five percent (25%) of the Board membership, setting forth the reason for calling a special meeting. In their consideration of whether a Special meeting is necessary Board members must be mindful not to substantively discuss the issue(s) which may come before the Board in their consideration of whether a Special Meeting is necessary.
- E. The Director of Corporation or designee shall notice all Board members of special meetings by email, telephone, or any other electronic means at least three (3) calendar days in advance. These notices shall contain the meeting date, time, location, and identify the purpose of the meeting and whether it has been called by the Chair or by written request.
- F. The public shall be informed of all meetings of the Board and Committees of the Board through notices which shall state the meeting date, time, location, and purpose. Special meeting notices shall identify whether it has been called by the Chair or by written request.
- G. Written minutes shall be kept of all Board and Committee meetings. Written minutes shall be reviewed and approved at the next regularly scheduled Board or Committee meeting. The official minutes of meetings of the Board and Committees of the Board are public record and shall be open to inspection by the public. All minutes shall be kept on file by the Board Secretary at Corporation administrative office as the record of the official actions of the Board or Committee for as long as prescribed by Chapter 119 of the Florida Statutes.
- H. All Board and Committee meetings shall be conducted in accordance with the "sunshine provision" of WIOA and Florida's Government-in-the-Sunshine Act.
- I. The Board may allow members to participate in Board and Committee meetings by the use of technology, such as telephone and web-based meetings, to promote member participation, provided that same access be made available to the public and it allows all persons participating in the meeting to hear each other.
- J. Members of the public may attend Board or committee meetings and will be given an opportunity to be heard at such meetings except in cases where the meeting involves an emergency situation affecting the public health, welfare, or safety, and comments would cause an unreasonable delay, a ministerial act, is exempt from Florida Statute Section 286.011, or where the Board or committee is acting in a quasi-judicial capacity. An individual is limited to three (3) minutes to make public comment at a Board or committee meeting, absent the Board or committee granting the individual an extension of time. The procedures for an individual to inform the Board or

committee of a desire to be heard at a Board or committee meeting will be published on the agenda.

## Section 9.2 – Participation in Meetings

Participation in Board and Executive Committee meetings shall be limited to members of the Board, Committees of the Board, Corporation staff, County Liaison(s) to Corporation and Board Counsel, with the exception of regularly scheduled agenda items that call for reports or participation by non-members. A time shall be set on the agenda for the receipt of public comment to allow input or comment from any member of the public.

## Section 9.3 – Parliamentary Procedures

Where parliamentary procedures are not covered by these By-laws, Robert's Rules of Order, Revised, shall prevail.

# **ARTICLE X**

## **QUORUM, VOTING, CONFLICT OF INTEREST,**

## **AND RELATED PARTY CONTRACTS**

## Section 10.1 – Quorum

A quorum is required to conduct official business of the Board and Committees of the Board.

- A. A quorum of the Board and Committees of the Board shall consist of at least forty percent (40%) of the actual appointed membership;
- B. Board and Committee members participating by the use of technology, such as telephone and web-based meetings, will be included as part of the quorum as a quorum does not have to be physically present to conduct business; and
- C. In the absence of a quorum, no official action shall be taken on any item by the Board or Committee.

## Section 10.2 – Voting

- A. Any action that may be taken by the Board or a Committee shall be considered the act of the Board or Committee only if the action is taken by an affirmative vote of the majority of the actual appointed membership in attendance at a meeting where a quorum has been established unless otherwise specified in these bylaws.
- B. Each member of the Board or Committee shall have one (1) vote when present at a Board or Committee meeting, whether attending in person or by telephone or other type of communication technology.
- C. Members may not vote by proxy.
- D. Voting privileges of non-Board members selected to serve on a Committee are limited to that Committee.
- E. A member of the Board or Committee, who is present, either in person or by telephone or other type of communication technology, at a meeting of the Board or Committee at

which action on any matter is taken shall vote on all said actions or matters. Every vote shall be declared and entered in the minutes of the meeting except as provided below in the case of conflict of interest.

- F. A Board member acting as presiding Officer at a meeting of the Board or a Committee shall be entitled to vote on the same basis as if not acting as the presiding Officer.
- G. Any action item considered, voted on and approved by a Committee, excluding approval of meeting minutes and adjournment of meeting, shall be brought forth for approval at the next Board meeting.

### Section 10.3 – Conflict of Interest

When an issue presents a conflict of interest to a Board or Committee member, said member shall verbally disclose the conflict of interest, abstain from voting, leave the room during discussion, and vote on said issue, and submit a Voting Abstention form to the Administrative Services Coordinator. Reference to the member leaving the room and submission of the Voting Abstention form shall be included in meeting minutes.

No Board or Committee member shall vote upon any measure which would inure to their special private gain or loss; which they know would inure to the special private gain or loss of any principal by whom they are retained or to the parent organization or subsidiary of a corporate principal by which they are retained; or which they know would inure to the special private gain or loss of a relative or business associate. A relative is defined as any father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, or daughter-in-law. See Chapter 112 Section 3143 Florida Statutes.

### Section 10.4 – Related Party Contracts

Related party contracts shall require a two-thirds (2/3<sup>rd</sup>) vote of the Board or Committee for approval, a quorum having been established, and the Board or Committee member who has a conflict of interest shall comply with requirements of Section 9.3. All related party contracts shall be reported to FloridaCommerce for review and approval prior to being executed, as required. A related party contract is any contract made between Corporation and a member of the Board or Committee, or Board or Committee member's relative, or an entity represented by that Board or Committee member.

## **ARTICLE XI** **AMENDMENTS**

### Section 11.1 – Amendments

These By-laws may be amended or replaced only by the Consortium. At the Consortium's sole discretion, the Consortium may consult with the Board during the Consortium's consideration of amendments or replacements to these By-laws. The Board may initiate or support this process by providing recommendations for amendment or replacement for Consortium consideration and approval.

### Section 11.2 – Recommendations for Amendments



The Board may recommend to the Consortium these By-laws be amended or replaced by a two-thirds (2/3<sup>rd</sup>) affirmative vote of the quorum in attendance at the Board meeting. Notice of recommending a proposed amendment to or replacement of these bylaws shall be made no less than five (5) calendar days prior to the Board meeting at which such amendment or repeal is acted upon.

## **ARTICLE XII**

### **GENERAL PROVISIONS**

#### Section 12.1 – General Provisions

Nothing in these By-laws shall be construed to take precedence over federal, state, or local laws or regulations, or to constrain the rights or obligations of the Consortium or State.

## **ARTICLE XIII**

### **INDEMNIFICATION**

#### Section 13.1 – Indemnification of Board Members

Corporation shall indemnify and hold harmless any Board Officer, Board member, or staff person, or former Board Officer, Board member, or staff person, for expenses actually and reasonably incurred by him or her in connection with the defense of any action, suit or proceeding, civil or criminal, in which he or she is made a party by reason of being or having been a Board Officer, Board member, or staff person, except in relation to matters in which he or she was adjudged, in the action, suit or proceeding, to be liable for negligence or misconduct in the performance of his or her duties.

#### Section 13.2 – Rights to Indemnification

The right to indemnification under this Article is only available to the extent that the power to indemnify is lawful and to the extent that the person to be indemnified is lawful and to the extent that the person to be indemnified is not insured or otherwise indemnified.

#### Section 13.3 – Indemnification Insurance

Corporation shall purchase and maintain insurance sufficient to meet this Article's indemnification requirements.

## **ARTICLE XIV**

### **FISCAL YEAR**

#### Section 14.1 – Fiscal Year

The fiscal year of Corporation shall be July 1 through June 30.

## **ARTICLE XV** **DISSOLUTION**

### Section 15.1 – Dissolution

Upon the dissolution of Corporation, the Officers shall, after paying or making provision for the payment of all the liabilities of Corporation, dispose of the remaining assets of Corporation by returning them to the U.S. Department of Labor, the state designee, or, if the U.S. Department of Labor and state designee agree, giving those assets to local charitable, educational, religious, or scientific purposes, which qualify as a Section 501(c)3 non-profit organization under the Internal Revenue Code.

## **ARTICLE XVI** **ENACTMENT PROVISION**

### Section 16.1 – Enactment Provision

Pursuant to 20 C.F.R. 679.310(g), these By-laws shall become effective upon approval by the Consortium.



## Action Item

### Youth Organizational and Program Naming Confirmation

#### History:

- Tampa Bay Hires is the current brand name for the Hillsborough year-round program for youth
- Tampa Bay Summer Hires is the current brand name for the Hillsborough Youth summer program
- Tampa Bay Summer P.A.Y.S. is the current brand used by the Pinellas youth summer program
- Many of the current grants are under the name, Tampa Bay Summer Hires
- All sub-brand names will be used in conjunction with the main brand name CareerSource Tampa Bay

**Background:** As part of our strategic rebranding efforts, **Vistra Communications** was awarded the bid to independently conduct research, which included stakeholder surveys and focus groups across the region. Their findings have informed recommendations compiled in their report.

In June 2025 the CSTB Board of Directors approved the main Brand name, CareerSource Tampa Bay after hearing a briefing on the study. The BODs did not vote on the name of the sub-brand names for the summer youth programs as that was determined it would go back to the Youth Development Committee to review the findings in the Vistra report.

Attached, the Committee will find the final summary from Vistra report. The report highlights two research products, the **VLAB** or virtual lab which was done in real time and a **Survey** that was sent out to those who could not take part in the VLAB.

- See page 8 for **VLAB** feedback youth summer programs
- See page 9 paragraph 5 for **VLAB** results on youth summer program.
- See page 12 for **Survey** results:
- See page 13 for Survey summer results, paragraph 4

This multi-method approach ensures that the analysis is both data-informed and community-centered. Assessments were made on the organization's sub-brand names (past and current) for youth programs, including Tampa Bay Hires, Tampa Bay Summer Hires and Summer PAYS.

Please note that the Youth Summer Program name will take effect beginning with the 2026 summer program cycle. The Youth name recommendation will be presented before the Youth Committee before being presented to the full Board.

*(See summary report attached in the Board Packet)*

## **Recommendation:**

The Youth Development Committee is recommending to approve the unanimous recommendation to adopt **CareerSource Tampa Bay Youth Connection** as the official year-round youth sub-brand, replacing the previous name **Tampa Bay Hires**.

Additionally, it is recommended that the summer youth program be officially branded as **CareerSource Tampa Bay Summer PAYS** — an acronym for Preparing Area Youth for Success. This will replace the previous name **Tampa Bay Summer Hires**.

If approved, these updated names will establish a unified youth sub-brand identity and guide all related public communications and outreach efforts moving forward.



# CareerSource Hillsborough Pinellas

## Naming And Brand Perception Analysis Report



813.961.4700



[ConsultVistra.com](http://ConsultVistra.com)



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Lutz, FL 33549



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## Introduction

This report presents a comprehensive analysis of the branding implications resulting from the merger of CareerSource Tampa Bay and CareerSource Pinellas, two workforce development organizations previously serving Hillsborough and Pinellas counties independently. As part of a statewide initiative to improve efficiency, streamline services, and foster regional collaboration, these two entities consolidated into a single organization. The newly merged entity, currently named CareerSource Hillsborough Pinellas, is now tasked with establishing a unified identity that reflects both its geographic reach and its strategic vision.

A central focus of this report is the evaluation of potential naming options for the merged organization. An effective name plays a vital role in public perception, community trust, and long-term brand equity. It must communicate regional inclusiveness, be easily recognizable, and support the organization's mission of workforce development for job seekers and employers alike.

To inform this evaluation, the analysis draws upon a diverse set of data sources, including:

- Media reviews and public sentiment,
- Internal organizational documents,
- Industry best practices on naming and brand strategy,
- Stakeholder feedback from a facilitated V-Lab® session, and
- A follow-up online survey including key community representatives.

This multi-method approach ensures that the analysis is both data-informed and community-centered. The goal is to assess whether the current name, CareerSource Hillsborough Pinellas, adequately supports the organization's goals and identity, or whether an alternative may better serve the organization's future positioning. Assessments were also made on the organization's sub-brand names for youth programs, including Tampa Bay Hires, Tampa Bay Summer Hires and Summer PAYS.

Ultimately, the findings and recommendations contained in this report aim to support a name that is inclusive, forward-looking, and reflective of the region's shared workforce priorities.

# CareerSource Hillsborough Pinellas Brand Audit and Research

## 1. BACKGROUND AND CONTEXT

### Overview of CareerSource Hillsborough Pinellas and Its Mission:

- CareerSource offers career planning services for professionals and business services for local companies.
- Serves Hillsborough and Pinellas counties, including Tampa, Brandon, Ruskin, Plant City, St. Petersburg, Clearwater, Largo and Pinellas Park.

#### Hillsborough Mission:

We expand career opportunities for individuals and enable the success of all workers through comprehensive workforce solutions that meet the needs of the community.

#### Pinellas Mission:

We develop and lead an effective, efficient and integrated business-driven workforce system, providing comprehensive and responsive services to the County's citizens and business community.

#### Vision:

Empower workers to achieve success and drive sustainable, positive change in the community.

### History of the CareerSource Brand

- **2013 Rebrand:**
  - All 24 regional workforce centers in Florida were rebranded under the CareerSource name to create a unified identity.
  - Previous names included Workforce Net (Pinellas), Tampa Bay Workforce Alliance (Tampa), Workforce One (Broward), and South Florida Workforce Investment Board (Miami).
- **2023-2024 Consolidation:**
  - In May 2023, the Governor approved the consolidation of 10 local workforce boards, including CareerSource Tampa Bay and CareerSource Pinellas.
  - The merger was approved by the board in September 2023, with implementation set for June 2024.
  - The new entity is named CareerSource Hillsborough Pinellas to reflect the regional alignment.

### Objectives Behind the Name Change

- **2013:** Strengthen brand identity, improve financial efficiency, and unify messaging across Florida.
- **2024:**
  - Enhance regional collaboration and service coordination.
  - Create a cohesive workforce development presence.
  - Improve cost efficiency while maintaining community impact.
  - Ensure clarity in branding for job seekers and businesses in both counties.



## 2. RESEARCH

This research utilized a combination of media analysis, public feedback, organizational documentation and industry trend analysis to assess the implications of the CareerSource Hillsborough Pinellas name change.

### Media Review

Sources Reviewed:

- **CareerSource Florida contemplates again merging Pinellas, Hillsborough workforce boards** – Florida Politics
- **Pinellas officials: If job centers merge, don't leave us behind** – Tampa Bay Times
- **Local Officials Express Concern Over CareerSource Merger** – St. Pete Catalyst
- **Pinellas, Hillsborough workforce agency's first CEO** – St. Pete Catalyst
- **Hillsborough and Pinellas Boards of County Commissioners approve Interlocal Agreement to combine workforce boards** – Pinellas.gov

### Findings:

- **Public Concern Over the Merger:**
  - Some local officials and community members expressed concerns about the merger, particularly regarding resource allocation and accessibility.
  - Sentiment that Hillsborough and Pinellas should remain separate due to geographic and economic differences.
  - Worries about travel complications for job seekers who may need to access services across county lines.
  - Fear that individualized attention for job seekers might decline due to the broader regional scope.
- **Media Sentiment:**
  - Coverage reflected a mix of optimism and skepticism.
  - Some outlets emphasized the benefits of streamlined operations and stronger regional workforce strategies.
  - Other reports highlighted pushbacks from local officials and community members, particularly in Pinellas County, where concerns about resource distribution were more pronounced.
- **Recurring Themes:**
  - **Efficiency vs. Local Identity:** Debate over whether the consolidation would improve services or dilute the unique needs of each county.
  - **Regional Accessibility:** Questions about how effectively the workforce services will be delivered across a larger area.

## Organizational Documents & Reports

A review of internal documentation provided insights into the goals, expectations, and potential challenges associated with the name change.

### Sources Reviewed:

- CareerSource Tampa Bay and CareerSource Pinellas Marketing Materials & Reports
- Merger FAQ Document – CareerSource Tampa Bay
- CareerSource Florida REACH Act

### Findings:

- Strategic goals of the merger:
  - Improved coordination of workforce programs across the region.
  - More efficient use of funding and elimination of operational redundancies.
  - Stronger regional employer engagement.
- Rationale for the new name:
  - Reflects the geographic scope of the merged entity.
  - Maintains the CareerSource brand identity while distinguishing it from other regional boards.
  - Reinforces a unified workforce approach while retaining local recognition.

## Industry Reports on Naming Trends & Brand Positioning

To view the CareerSource Hillsborough Pinellas name within broader workforce branding trends, workforce development and branding reports were examined.

### Findings:

- Geographic naming conventions are commonly used to establish regional identity and clarity.
- Short, clear, and regionally descriptive names tend to perform well in recognition and branding.
- Many workforce boards use county or regional identifiers in their names to maintain community connections while signaling a broader service area.
- Organizations that undergo mergers often retain elements of their previous branding to preserve recognition and trust among stakeholders.

## Social Media Analysis

- **Instagram Presence:**

- The CareerSource Hillsborough Pinellas Instagram account has been established as the new social media hub for the merged entity.
- Engagement levels and follower count will be key indicators of how well the rebranding effort resonates with the community.



- **Messaging from CareerSource Hillsborough:**

- CareerSource Hillsborough Pinellas previously posted about the transition, stating:
  - “Excited to see what the future holds for Tampa Bay’s workforce development.”
  - This phrasing is notable, as it initially referred to the workforce area as Tampa Bay rather than distinguishing Hillsborough and Pinellas as separate entities.
- The phrase “Career fit across the entire Tampa Bay region” suggests an effort to frame Pinellas as part of a broader regional identity rather than as a distinct county.



- **Facebook Transition:**

- CareerSource Hillsborough Pinellas has consolidated its social media presence under a new Facebook page. They announced the move from their previous page, CareerSource Tampa Bay, directing followers to the new page for updates and information.



## Merger Communication:

- The merger of CareerSource Pinellas and CareerSource Tampa Bay was communicated through various channels, including a video announcement expressing enthusiasm for the unified organization’s future.

## 3. SOURCES

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# V-LAB

(See Appendix A for full results.)

## Background

On April 3, 2025, Vistra conducted a V-Lab® session with 24 participants to evaluate and provide feedback on identifying a new name for CareerSource Hillsborough Pinellas, after the recent merger of CareerSource Tampa Bay and CareerSource Pinellas. Invitations were sent to 97 community members, with equal representation from both Hillsborough and Pinellas counties.



## Approach

The V-Lab® provided a forum to assess stakeholder perceptions following the merger of CareerSource Tampa Bay and CareerSource Pinellas. Through structured surveys, brainstorming, and real-time feedback, participants explored both the opportunities and challenges of the merger. A key part of the session focused on rebranding, particularly the evaluation of potential new names for the organization, as well as names for sub-brands.

## Participants

A total of 31 out of 97 community members from Hillsborough and Pinellas counties registered to participate. Due to scheduling, 24 community members participated in the session with the following demographics:

### Affiliation:

- **55% Board Members**
- **11% Partners**
- **5% Community Supporter**
- **5% Former Board Member**

### Affiliation by Location:

- Tampa Bay (CareerSource Tampa Bay) – **15 participants (63%)**
- Pinellas (CareerSource Pinellas) – **6 participants (25%)**
- Not affiliated with CareerSource – **2 participants (8%)**
- Other CareerSource organization – **1 participant (4%)**

## Key Findings

General Sentiment on the Merger

- **Majority Positive:**
  - Optimism centers on regional impact, funding potential, and improved services.
- **Minority Skepticism:**
  - Concerns about Pinellas County’s representation, potential loss of identity, and the history of a failed prior merger continue to generate resistance.

**73%** of participants felt the positives outweigh the negatives of the merger

## Top Perceived Benefits of the Merger

(Participants ranked benefits on a scale of 1 to 10, where 1 means not all potentially positive and 10 means extremely potentially positive.)

- Stronger Workforce Development **8.82 avg rating**
- Increased Regional Coverage and Presence **8.73**
- Leverage and Strategic Partnerships **8.36**
- Increased Grant and Funding Opportunities **8.27**

## Participants praised:

- Unified approach to workforce development.
- Better employer partnerships.
- Enhanced access for job seekers across both counties.

## Primary Concerns and Risks

- Geographic Representation Imbalance **8.5 avg negative impact**
- Cultural Integration Challenges **8.24**
- Fear Pinellas Will Be Overshadowed **8.09**

## Themes:

- “Hillsborough dominance” remains a strong perception.
- Fear of lost autonomy and identity for Pinellas stakeholders.
- Concern that a “one-size-fits-all” approach will overlook local nuances.

## Brand/Naming Preferences

- **CareerSource Tampa Bay** was the most preferred name across all tests
- **CareerSource Greater Tampa Bay**, **Bridging Tampa Bay**, and **Bay Area** followed with moderate support.

**38–52% Support**

## Key name choice reasons:

- “Tampa Bay” is simple, familiar, and regionally inclusive.
- “Bridging” metaphorically resonated for uniting communities across the Bay.
- Names listing multiple cities or counties were seen as too long or politically fraught.

## Feedback on Youth Program Names

- **Tampa Bay Hires** and **Tampa Bay Summer Hires**:
  - Generally seen as unclear and too generic, especially for targeting youth (16–24).
  - Lacked specificity and energy to engage the intended demographic.
- **Summer P.A.Y.S.** (Preparing Area Youth for Success):
  - Rated the most effective and memorable youth program name.
  - Strong appeal due to acronym, clarity, and youth focus.





## V-Lab® Summary

On April 3, 2025, Vistra facilitated a V-Lab® session with 24 stakeholders representing both Hillsborough and Pinellas counties. The purpose of the session was to gather community input on the merger of CareerSource Tampa Bay and CareerSource Pinellas, and to evaluate potential names for the newly combined organization. Participants included board members, partners, and community supporters, with representation across Hillsborough and Pinellas counties.

The session revealed a generally positive outlook toward the merger, with 73% of participants expressing that its benefits outweigh the drawbacks. Participants identified several key opportunities arising from the consolidation, including enhanced workforce development, broader regional coverage, and greater potential for strategic partnerships and funding. These elements were consistently rated highly, indicating confidence in the merger's capacity to strengthen the region's workforce system and extend access to services across both counties.

However, notable concerns were also expressed, particularly among Pinellas participants. The most prominent issues included perceived geographic imbalances, challenges in blending organizational cultures, and fears that Pinellas might lose its identity or be overshadowed by Hillsborough. These concerns underscore the importance of equitable representation and culturally sensitive integration as the new organization moves forward.

Regarding naming preferences, the top three choices identified during the session were "CareerSource Tampa Bay," "CareerSource Greater Tampa Bay," and "CareerSource Hillsborough Pinellas." Among these, "CareerSource Tampa Bay" was strongly favored for its simplicity, existing regional recognition, and inclusivity. Other names, such as those referencing broader metaphors like "Bridging Tampa Bay," were viewed as too long, politically charged, or lacking clarity. "CareerSource Tampa Bay" was seen as effectively conveying a unified, regional identity that resonates with residents, employers, and partners alike.

The session also addressed youth program branding. While current names such as Tampa Bay Hires and Tampa Bay Summer Hires were seen as too generic and lacking clarity for younger audiences, Summer P.A.Y.S. (Preparing Area Youth for Success) was widely praised for its memorable acronym and targeted appeal.

In summary, the V-Lab® session offered critical insights into community sentiment following the merger. While participants recognized significant promise in terms of regional impact and strategic opportunity, they also highlighted the need for deliberate, inclusive leadership to address lingering concerns. The findings point to "CareerSource Tampa Bay" as a preferred name that can unify the organization under a brand that is familiar, inclusive, and aligned with the region's broader identity.



## Survey

(See Appendix B for full results.)

### Methodology

The survey was conducted online between April 8 and April 23, 2025. It comprised 16 questions and was designed to take approximately 5 to 10 minutes to complete. A total of 82 identified stakeholder contacts were invited via email, resulting in 17 responses—a response rate of 20.7%.

### Respondent Demographics

- **Residence:**



- Hillsborough County: **53.3%**
- Pinellas County: **33.3%**
- Other (Palmetto, Pasco): **13.3%**

- **Work Location:**



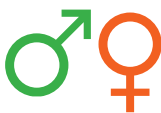
- Hillsborough County: **46.7%**
- Pinellas County: **40.0%**
- Other (Remote/Pasco, Both counties): **13.3%**

- **Relationship to CareerSource:**



- Board Member: **33.3%**
- Employee: **26.7%**
- Partner: **33.3%**
- Community Supporter: **6.7%**

- **Gender:**



- Male: **60.0%**
- Female: **40.0%**

- **Age Group:**



- 25 to 34: **13.3%**
- 35 to 44: **33.3%**
- 45 to 54: **20.0%**
- 55 to 64: **26.7%**
- 75 or older: **6.7%**



## Key Findings

### A. Organizational Name Preference

- **Most Preferred Name:** *CareerSource Tampa Bay*
  - Received the highest ranking as the most preferred name.
  - Seen as straightforward, familiar, and representative of both counties.
  - Several respondents cited existing brand recognition and alignment with local identity (e.g., sports teams).
- **Second Preferred:** *CareerSource Greater Tampa Bay*
  - Recognized for encompassing both counties and smaller municipalities, but some concern it might overlap with other regional entities.
- **Least Preferred Options:**
  - CareerSource Bridging Tampa Bay and CareerSource Tampa Bay United were viewed as too long and potentially confusing or gimmicky.
  - “Bay Area” was flagged for potential geographic ambiguity (e.g., mistaken for San Francisco Bay Area).
- **Concerns Noted:**
  - Several names perceived as overly long or misaligned with public perception.
  - Concerns that some names (e.g., “Tampa Bay”) might diminish recognition of Pinellas County.
  - “Tampa Bay United” resembled sports team branding, which some respondents found inappropriate.
- **Additional Suggestions:**

<ul style="list-style-type: none"><li>○ CareerSource Bay to Beach</li><li>○ CareerSource Florida Bay</li></ul>	<ul style="list-style-type: none"><li>○ Greater Tampa CareerSource</li><li>○ Tampa Bay Workforce</li></ul>
--	--

## B. Program Name Feedback

### 1. TAMPA BAY HIRES:

- Generally seen as clear but lacking specificity for youth audiences.
- Suggestions: Tampa Bay Youth Hires, Tampa Hire Squad, CareerSource New Starts.

### 2. TAMPA BAY SUMMER HIRES:

- Feedback mirrored the above, with concerns over clarity.
- Suggestions: Tampa Bay Apprenticeships, Teen Hires, Future Ready Summer Hires.

### 3. SUMMER P.A.Y.S.:

- Less intuitive without prior context.
- Suggested alternatives: Rise & Earn, Work Xperience, Tampa Bay Youth Internship.



## Survey Summary

Between April 8 and April 23, 2025, CareerSource Hillsborough Pinellas conducted an online survey to collect stakeholder feedback on the recent organizational merger and potential new names for the unified entity. The survey was distributed to 82 identified stakeholders, generating 17 responses—a 20.7% response rate. Respondents represented a cross-section of the workforce community, including board members, employees, partners, and community supporters, with a majority residing or working in either Hillsborough or Pinellas counties.

Survey results reinforced key findings from the V-Lab® session, particularly the strong preference for the name “CareerSource Tampa Bay.” This option was consistently rated as the most effective, with respondents citing its simplicity, regional familiarity, and alignment with the area’s broader identity, including sports teams, businesses, and media. The other top names included “CareerSource Greater Tampa Bay” and “CareerSource Bay Area.” While “CareerSource Greater Tampa Bay” received some support for its geographic inclusivity, and “CareerSource Bay Area” was noted for its broader regional connotation, both were seen as less distinctive or potentially confusing compared to the clarity and brand recognition of “CareerSource Tampa Bay.”

Some concerns were voiced about the potential for the “Tampa Bay” label to obscure Pinellas County’s identity, though most respondents acknowledged its broad regional recognition and unifying appeal.

Feedback on youth program naming revealed a need for more targeted and engaging branding. Both “Tampa Bay Hires” and “Tampa Bay Summer Hires” were seen as too generic and unclear about their focus on youth, with many respondents suggesting the names did not communicate the intended age range or the breadth of services offered. In contrast, “Summer P.A.Y.S.” (Preparing Area Youth for Success) received more favorable reviews. Respondents appreciated its clarity, relevance to youth, and the use of an engaging and meaningful acronym.

Overall, survey participants generally viewed the merger in a positive light, echoing sentiments shared during the V-Lab® . Many believe the merger offers long-term benefits in terms of operational efficiency, expanded reach, and service alignment. Though some noted the importance of continued attention to equity, especially in resource allocation and representation across counties. The survey results underscore the importance of selecting a name that reflects unity and clarity, while also advancing a brand identity that resonates with all stakeholders throughout the Tampa Bay region.



## Conclusion

After a thorough evaluation of the research findings, V-Lab® session insights, and stakeholder survey results, the current name, CareerSource Hillsborough Pinellas, while geographically accurate, lacks the simplicity, regional unity, and brand recognition necessary for long-term success. Stakeholders across both counties, including board members, partners, and community supporters, consistently expressed a strong preference for a name that is recognizable, unifying, and future focused.

Across both the V-Lab® and survey, three name options consistently rose to the top: “CareerSource Tampa Bay,” “CareerSource Greater Tampa Bay,” and “CareerSource Hillsborough Pinellas” in the V-Lab®, and “CareerSource Tampa Bay,” “CareerSource Greater Tampa Bay,” and “CareerSource Bay Area” in the survey. Of these, **“CareerSource Tampa Bay”** emerged as the clear front-runner. Stakeholders across both counties consistently expressed a strong preference for this name due to its clarity, regional familiarity, and inclusive identity.

Although some concerns were raised about the potential overshadowing of Pinellas County, the “Tampa Bay” designation is widely accepted as representing the full metropolitan area, encompassing the diversity and strengths of both counties. Furthermore, its established brand equity across sports, business, and civic life positions it as a strategic asset that can unify and elevate the organization.

Moreover, the existing brand equity associated with “Tampa Bay” (in sports, business, and civic life) offers a strategic advantage. It allows the organization to maintain continuity and recognition while also signaling a modern, collaborative regional approach to workforce development. “CareerSource Tampa Bay” is more than a name; it is a platform for unity, efficiency, and opportunity across the region. Choosing it signals a bold commitment to a shared future while honoring the unique contributions of both Hillsborough and Pinellas counties. With inclusive messaging and transparent leadership, the organization can move forward as a truly regional, trusted workforce resource.





Information Item

WIOA Primary Indicators of Performance: PY 2425 Q4

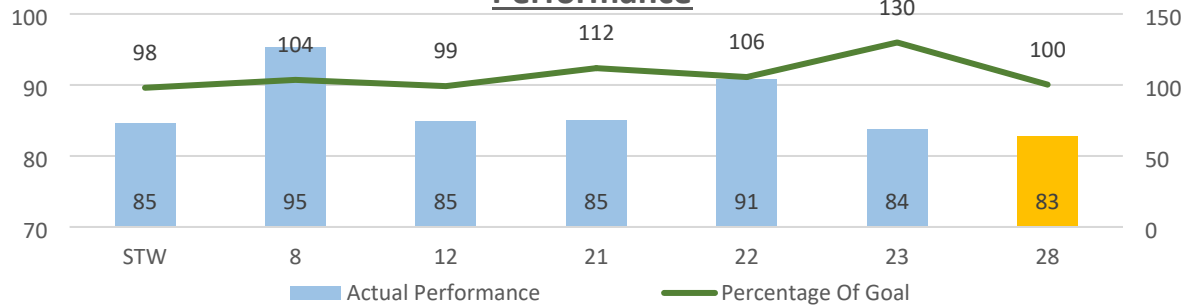
July 1<sup>st</sup>, 2024 – June 30<sup>th</sup>, 2025

Measures	PY2024-2025 4 <sup>th</sup> Q4 Quarter Performance	PY2024-2025 % of Performance Goal Met For Q4	PY2425 Performance Goals
<b>Adults:</b>			
Employed 2nd Qtr After Exit	82.7	100.24	82.5
Median Wage 2nd Quarter After Exit	\$9,075.0	106.87	\$8,492
Employed 4th Qtr After Exit	85.5	104.78	81.6
Credential Attainment Rate	76.4	92.05	83
Measurable Skill Gains	76.9	126.27	60.9
<b>Dislocated Workers:</b>			
Employed 2nd Qtr After Exit	77.9	93.97	82.9
Median Wage 2nd Quarter After Exit	\$9,260.0	83.24	\$11,125
Employed 4th Qtr After Exit	85.8	106.32	80.7
Credential Attainment Rate	79.8	95.57	83.5
Measurable Skill Gains	85.2	100.71	84.6
<b>Youth:</b>			
Employed 2nd Qtr After Exit	79.2	99.75	79.4
Median Wage 2nd Quarter After Exit	\$5,528.5	135.94	\$4,067
Employed 4th Qtr After Exit	83.2	103.48	80.4
Credential Attainment Rate	75.6	120.57	62.7
Measurable Skill Gains	71	120.34	59
<b>Wagner Peyser:</b>			
Employed 2nd Qtr After Exit	66.8	102.14	65.4
Median Wage 2nd Quarter After Exit	\$8,006.5	113.01	\$7,085
Employed 4th Qtr After Exit	68.4	111.22	61.5
<b>Not Met (less than 90% of negotiated)</b>			
<b>Met (90-100% of negotiated)</b>			
<b>Exceeded (greater than 100% of negotiated)</b>			

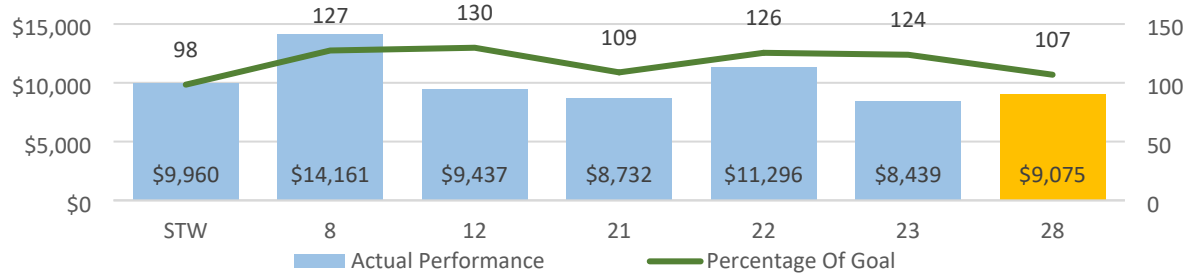
Statewide

Measures	PY2024-2025 4th Quarter Performance	PY2024-2025 % of Performance Goal Met For Q4	PY2024-2025 Performance Goals
<b>Adults:</b>			
Employed 2nd Qtr After Exit	84.6	98.03	86.30
Median Wage 2nd Quarter After Exit	\$9,959.5	98.41	\$10,120
Employed 4th Qtr After Exit	83.5	113.61	73.50
Credential Attainment Rate	80.1	106.52	75.20
Measurable Skill Gains	86.5	113.82	76.00
<b>Dislocated Workers:</b>			
Employed 2nd Qtr After Exit	83.9	98.71	85.00
Median Wage 2nd Quarter After Exit	\$11,040.0	104.40	\$10,575
Employed 4th Qtr After Exit	83.7	104.36	80.20
Credential Attainment Rate	83.3	100.73	82.70
Measurable Skill Gains	88.1	128.43	68.60
<b>Youth:</b>			
Employed 2nd Qtr After Exit	78.1	95.95	81.40
Median Wage 2nd Quarter After Exit	\$4,962.0	108.86	\$4,558
Employed 4th Qtr After Exit	77.2	98.72	78.20
Credential Attainment Rate	72.6	98.91	73.40
Measurable Skill Gains	82.2	120.88	68.00
<b>Wagner Peyser:</b>			
Employed 2nd Qtr After Exit	66.3	97.21	68.20
Median Wage 2nd Quarter After Exit	\$7,740.0	104.31	\$7,420
Employed 4th Qtr After Exit	67.2	102.13	65.80
<b>Not Met (less than 90% of negotiated)</b>			
<b>Met (90-100% of negotiated)</b>			
<b>Exceeded (greater than 100% of negotiated)</b>			

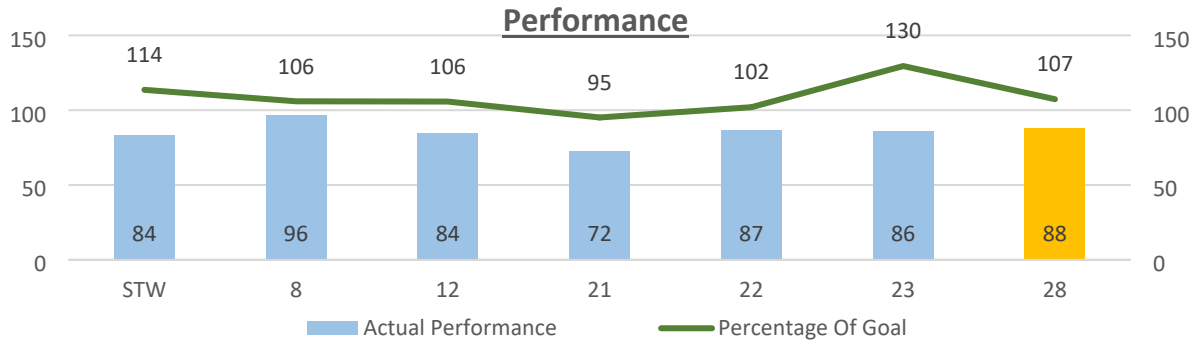
**Adult Employed 2 QTR After Exit % of Goal and Actual Performance**



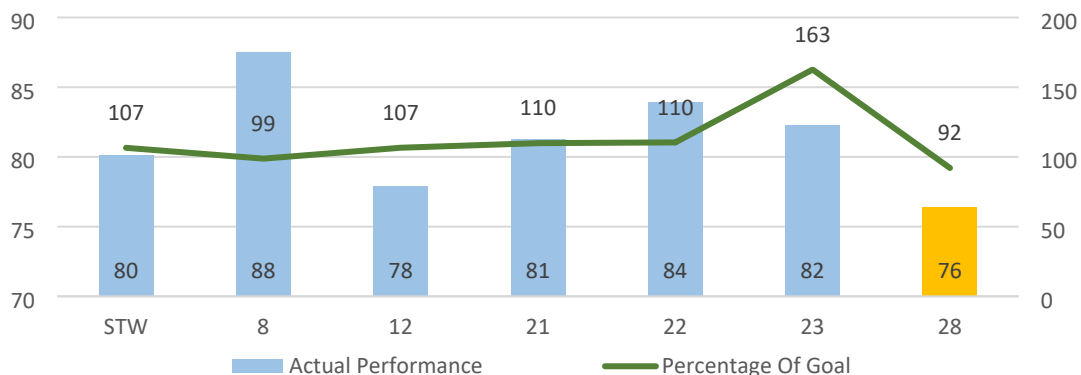
**Adult Median Wage 2nd QTR After Exit % of Goal and Actual Performance**



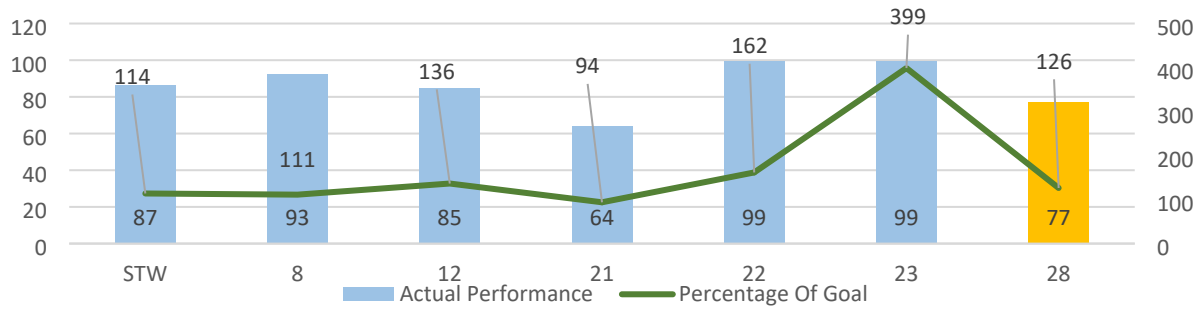
**Adult Employed 4th QTR After Exit % of Goal and Actual Performance**



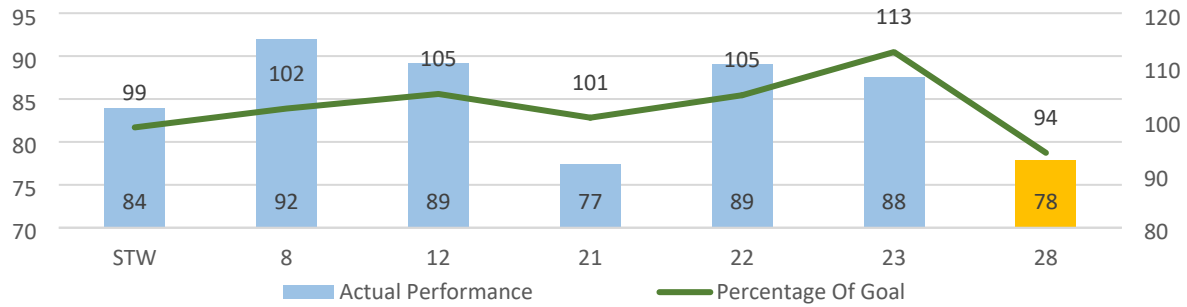
**Adult Credential Attainment Rate % of Goal and Actual Performance**



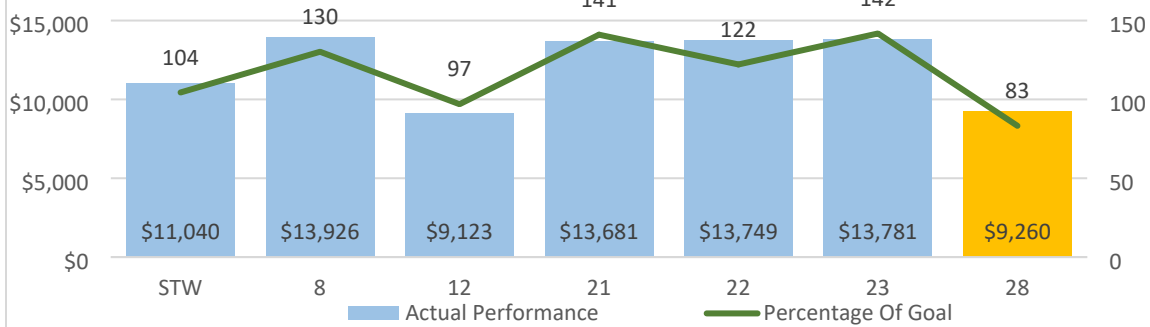
### Adult Measurable Skills Gain % of Goal and Actual Performance



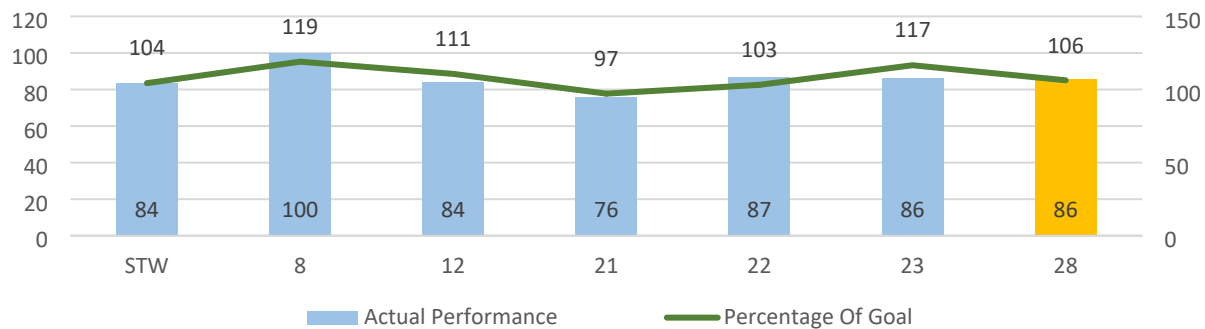
### DW Employed 2nd QTR After Exit % of Goal and Actual Performance



### DW Median Wage 2nd QTR After Exit % of Goal and Actual Performance

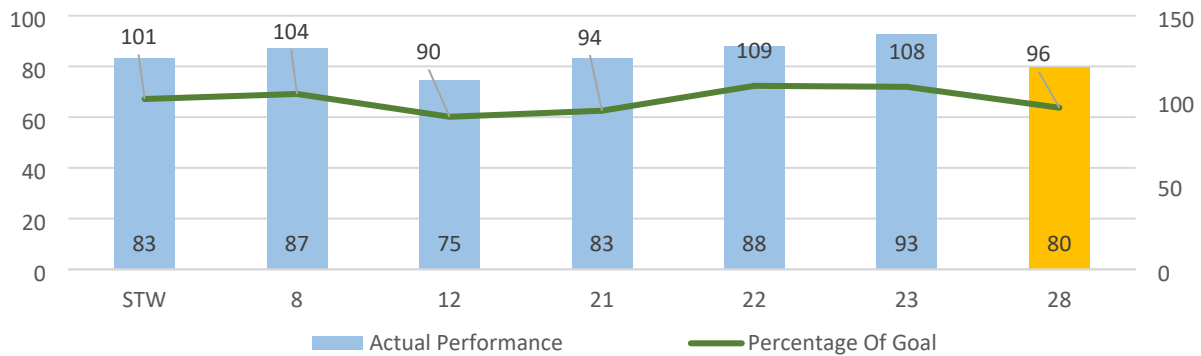


### DW Employed 4th QTR After Exit % of Goal and Actual Performance

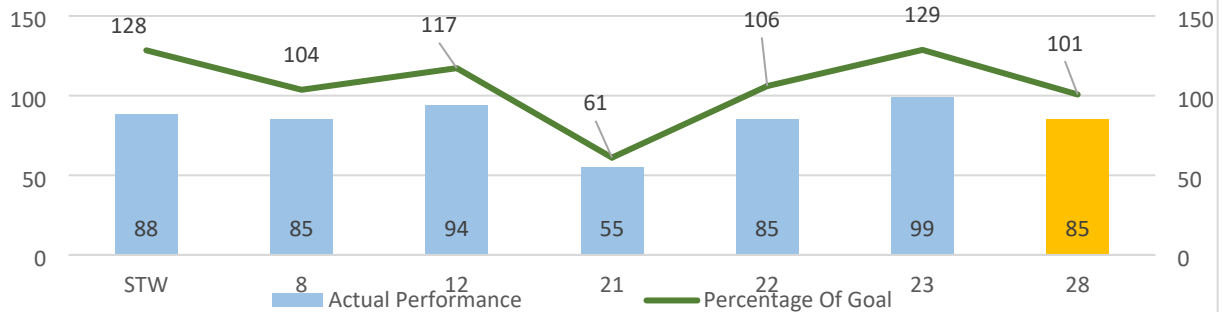




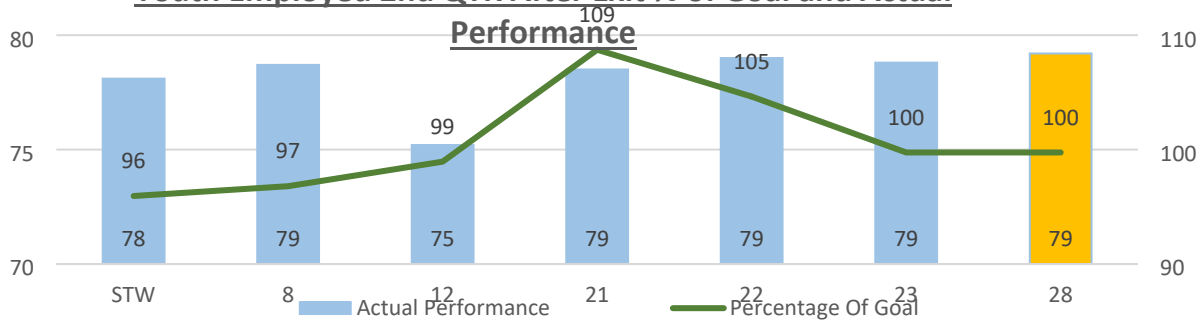
**DW Credential Attainment Rate % of Goal and Actual Performance**



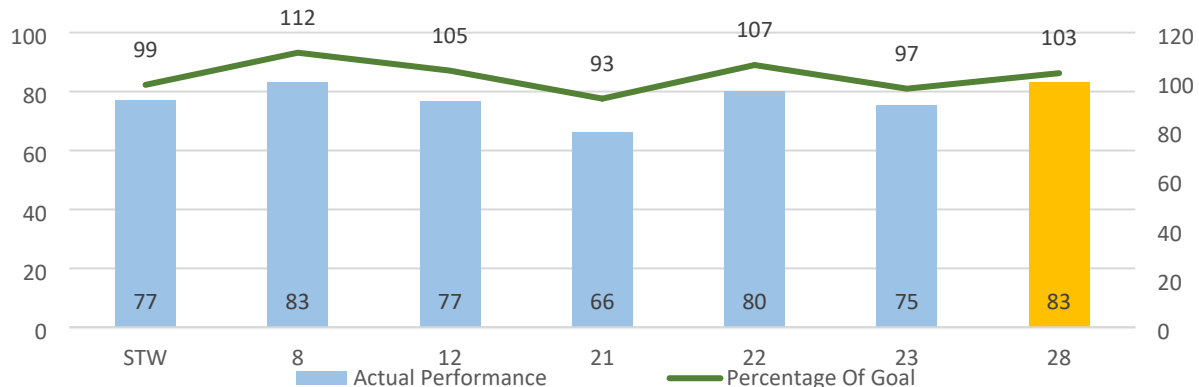
**DW Measurable Skills Gain % of Goal and Actual Performance**



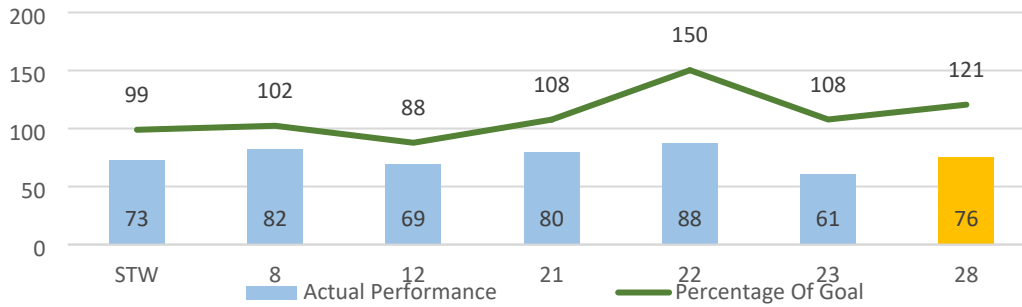
**Youth Employed 2nd QTR After Exit % of Goal and Actual Performance**



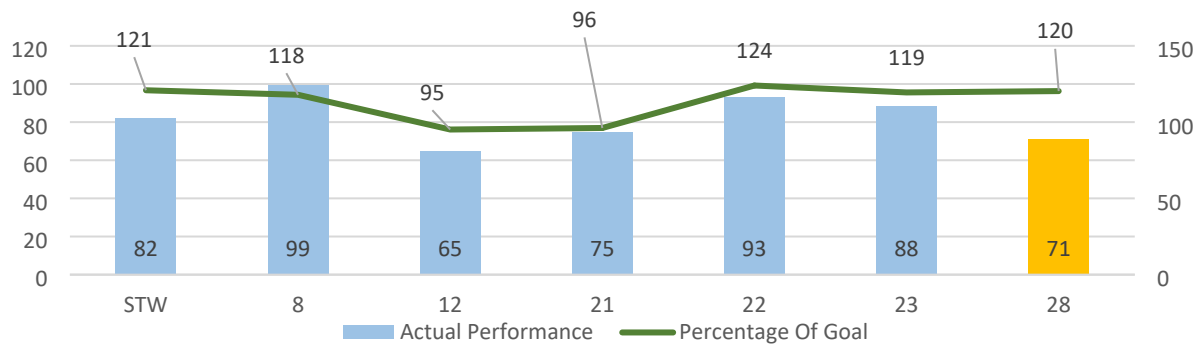
**Youth Employed 4th QTR After Exit % of Goal and Actual Performance**



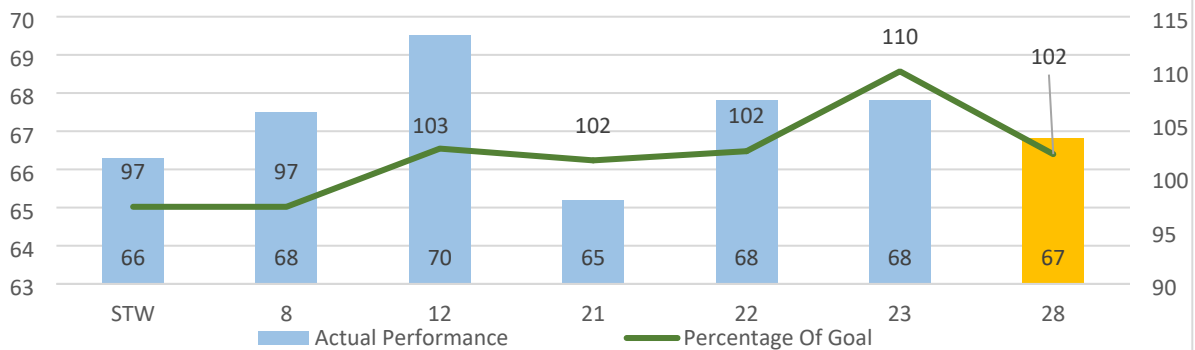
### Youth Credential Attainment % of Goal and Actual Performance



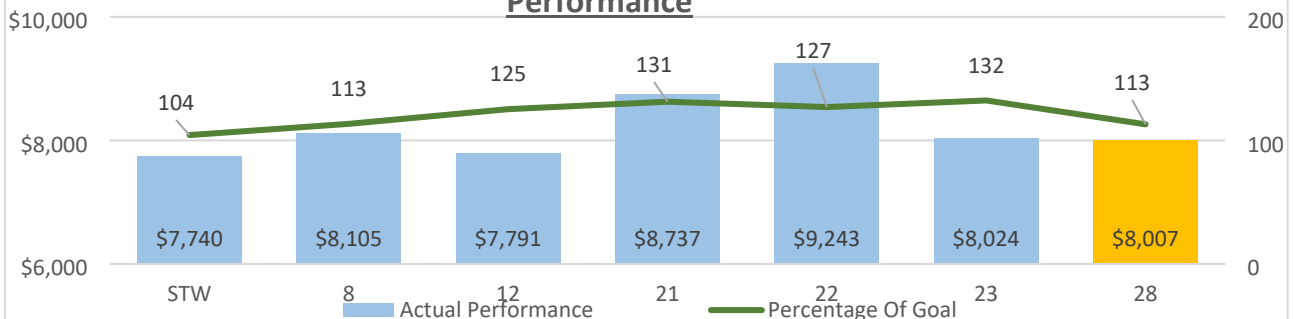
### Youth Measurable Skills Gain % of Goal and Actual Performance

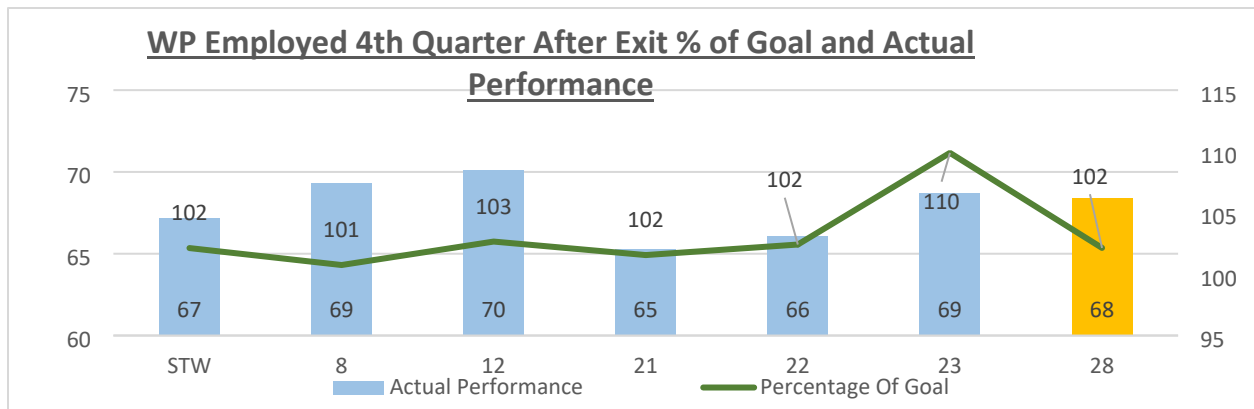


### WP Employed 2nd QTR After Exit % of Goal and Actual Performance



### WP Median Wage 2nd QTR After Exit % of Goal and Actual Performance





**STW – Statewide**

**Region 8- CareerSource North Florida**

**Region 12- CareerSource Central Florida**

**Region 21- CareerSource Palm Beach**

**Region 22- CareerSource Broward**

**Region 23- CareerSource South Florida**

**Region 28- CareerSource Hillsborough Pinellas**



## NOTES:



## NOTES:

Meridian One  
4350 West Cypress Street Suite 875 | Tampa, FL 33607  
[CareerSourceTampaBay.com](http://CareerSourceTampaBay.com)

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