

RFP 25-0255

REQUEST FOR PROPOSAL (RFP)

FOR

AUDIT AND TAX SERVICES

ISSUED July 9, 2025

**PROPOSALS DUE BY**

**August 4, 2025, 1:00 pm, EST**

**All proposals must be submitted electronically to** **rfp@careersourcehp.com**

The email subject line should read:

“Response to RFP 25-0255 Audit and Tax Services”

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# **SECTION A - INTRODUCTION**

## A.1 BACKGROUND

All incorporated and unincorporated areas within Hillsborough County (Tampa Bay Workforce Alliance, Inc. dba CareerSource Tampa Bay) and Pinellas County (WorkNet Pinellas, Inc dba CareerSource Pinellas or CSPIN) have been designated by the Governor of the State of Florida as the Region, as provided by CareerSource Florida, effective July 1, 2024.

Tampa Bay WorkForce Alliance, Inc. d/b/a CareerSource Tampa Bay is the grant recipient and the administrative and fiscal entity for the Hillsborough Pinellas Workforce Development Consortium (Consortium). The Consortium is composed of two currently serving Commissioners from the Hillsborough County Board of County Commissioners (Hillsborough County Chief Elected Official) and two currently serving Commissioners from the Pinellas County Board of County Commissioners (Pinellas County Chief Elected Official). The Consortium appoints the members of local workforce development board.

In accordance with a Plan of Merger approved and adopted by CSPIN (Merging Entity) on May 16, 2024 and CSTB (Surviving Entity) on February 15, 2024 and re-approved on May 16, 2024, the Merging Entity will merge with and into the Surviving Entity (CSTB). As of the effective date of Merger, the separate existence of the Merging Entity will thereupon cease, and the Surviving Entity will be the surviving entity in the Merger and will continue its legal existence under the laws of the State of Florida. The Merger became effective on the date the Articles of Merger were filed, July 1, 2024. CSTB is staffed with 164 (160 full-time and four part-time) year-round positions.

Tampa Bay Workforce Alliance, Inc. is organized under the laws of the state of Florida and has been determined exempt by the Internal Revenue Service (“IRS”) under the provisions of Section 501(c)(3) of IRS Code. The Organization is the direct service provider for various workforce programs which are supported by the U.S. Department of Labor, Health and Human Services, Agriculture, and other agencies as part of awards totaling $39,085,000 with 96% federally funded (Updated annually, as of August 2024).

## A.2 STATEMENT OF PURPOSE/NEED

This is a Request for Proposal (“RFP”) for an independent certified public accounting firm (the “proposer”, “contractor”, or “respondent”) to provide external independent auditing and tax services (Form 990) for Tampa Bay Workforce Alliance, Inc. d/b/a CareerSource Tampa Bay referred to as the “Organization” or “CareerSource Tampa Bay” or “CSTB” for the fiscal year ending June 30, 2025, with annual renewal options for four (4) years. Renewal is subject to CSTB Finance/Audit Committee and governing boards’ approval.

Responses shall, at a minimum, meet the specifications contained in this RFP. Auditing services are to be performed in accordance with Generally Accepted Auditing Standards, Government Auditing Standards, and the guidelines established by the U.S. Department of Labor, and any other specifications as may be necessary.

These documents constitute the complete set of specifications, requirements, and/or proposal forms. All terms and conditions of this RFP, any addenda, proposer’s submissions and negotiated terms, are incorporated into the contract by reference as set forth herein. Proposers are encouraged to thoroughly review the information contained therein to become familiar with the Organization and its operations.

## A.3 FINANCIAL OVERVIEW

CSTB’s fiscal year is July 1 to June 30th. The Organization’s 2024/2025 budgeted revenues for the fiscal year ending June 30, 2025, is approximately $30.2 million. Funds are awarded to CSTB on a July 1 – June 30, and October 1 - September 30 basis depending upon the grant. CSTB receives most of its funding for periods beginning in July and ending in June each year.

Region 28 is the new workforce development area. Region 28 was formerly Regions 14 and 15. Each Region has closed out its grants and audits for Fiscal years ending June 30, 2024, and prior. Fiscal year ending June 30, 2025, will be the first audit of the two-county area. The Organization utilized MIP Fund Accounting Software and converted to SAGE Accounting software (soft launch 7/1/2025). A third-party, Paylocity, processes the Organization’s payroll.

CSTB has two sub-recipient contracts currently. One-Stop Operator and Youth Services provider (Pinellas County only. Not the sole provider of Youth services).

As a subrecipient of federal financial assistance exceeding $750,000, CSTB is subject to the single audit requirements of Uniform Guidance, 2 CFR, Part 200-Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, along with additional requirements stipulated by in the Florida Department of Commerce as described below.

## A.4 SUPPORT

The Organization’s VP of Fiscal and Administrative Compliance will coordinate and support the audit. This includes but is not limited to coordinating meetings and providing contact information, reports from the Accounting System, and supporting documentation as well as preparing the June 30, 2025, financial statements and footnotes. In addition, the Organization’s staff shall prepare all the information and documents needed by the proposer to enable the preparation of the Organization’s Form 990.

Additional support personnel will be made available by the Organization to provide assistance, such as identifying locations of required records, gathering needed documentation and supporting information and such other tasks that will serve to expedite the audit and tax returns, with the understanding that support personnel must be given consideration to effectively perform the day-to-day requirements of their positions.

## A.6 QUALIFICATIONS OF THE PROPOSER

To be considered for evaluation, a proposer shall be licensed to practice public accounting within the State of Florida and a member in good standing of the American Institute of Certified Public Accountants and the Florida Institute of Certified Public Accountants. The Contractor selected will have experience in nonprofit auditing, accounting, tax preparation/compliance and experience performing audits of federal and state programs and funds for at least five (5) years.

# **SECTION B – SCOPE OF WORK**

## B.1 SERVICES

CSTB is requesting the following services:

1. An independent, financial and compliance audit is to be conducted, completed, and submitted as required.
2. Audit will examine the status of compliance with stated federal laws governing structure, functions and mission of local workforce boards and report any material non-compliance.
3. The audit will be conducted in accordance with generally-accepted auditing standards and the most current revision of Governmental Auditing Standards issued by the Comptroller General of the United States, Government Accountability Office. In addition, the audit is to be performed in accordance with Uniform Guidance, 2 CFR, Part 200-Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards; along with all regulations, policies and rules related to the applicable funding sources as issued by the U.S. Department of Labor, Florida Department of Children and Families, CareerSource Florida Inc. and the Florida Department of Commerce (FloridaCommerce). Also, each Audit shall comply with the Florida Single Audit Act, FS 215.97 and Chapter 10.650 of the Rules of the Auditor General, most current revisions if audit coverage of financial assistance is provided by the State (such as General Revenue) rather than by the Federal Government.
4. The Audit will include the independent auditor's report on the financial statements including balance sheet; related statement of revenues, expenses, and changes in fund balances; statement of functional expenses; and the notes to the financial statements. An independent auditor's report on the Schedule of Federal Awards and State Financial Assistance will also be provided.
5. Contractor will prepare and file IRS Form 990 by IRS deadlines.
6. Audit firm will conduct the audit procedures for the initial audit and merger of LWDB 14 and 15, as required and deemed necessary.
7. During the audit fieldwork, Contractor will communicate with CSTB CFO and VP of Fiscal and Administrative Compliance continuously with updates on activities and concerns.
8. Audit firm will perform required procedures mandated by the State and FloridaCommerce as follows:
9. Test CSTB's reconciliation of its financial records to Subrecipient Enterprise Resource Application (SERA), a proprietary system maintained by FloridaCommerce. The auditor will include a note to the financial statement confirming whether such a reconciliation was performed by CSTB in a satisfactory way.

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| 1. Test CSTB’s reconciliation of its year-end financial records to ensure the following conditions exist:
 |

1. Each federal award passed through FloridaCommerce must balance by the individual FloridaCommerce NFA ID#. Each NFA is required to be a self-balancing set of accounts.
2. Net assets of each federal award must equal zero.
3. Federal awards must not have negative cash balances without a sufficient explanation.
4. All cost pools allocated to their final cost objectives.

 If the conditions do not exist, the auditor should include an explanation in the audit report

1. Test CSTB’s application of its indirect cost rate agreement negotiated with FloridaCommerce and report areas of noncompliance.
2. Test compliance with federal cash management requirements and to report any material problems.
3. Prepare and submit a management letter specifying those findings and observations not included in the audit report. Providing a verbal briefing is not acceptable. CSTB must prepare a written statement of explanation or rebuttal, including corrective actions to be taken, addressing the deficiencies cited in the management letter. NOTE: If a management letter is not present, this should be stated in the schedule of findings and questioned costs.
4. All funds overseen, managed, or administered by CSTB must be included in the scope of the audit and within the audited financial statements.
5. The auditor should state in the Report on Compliance and Internal Control over Compliance Applicable to Each Major Federal Awards Program that the audit was conducted in accordance with the special audit guidance provided by FloridaCommerce.
6. Timeline for June, 2025 audit: Proposing Contractors will be expected to conduct the necessary fieldwork in the month of October for the fiscal year ending June 30, 2025, audit. Timing of fieldwork for the subsequent year’s audits will be coordinated. Delivery schedule: The audit reports and audited financial statements no later than mid-November. The proceeding deadlines are subject to change upon agreement of both the proposer and CSTB; however, under no circumstances will audit deadlines extend beyond the submission deadlines in Florida statutes. The firm selected will be asked to present the Audit Report to the CSTB Finance/Audit Committee and to the CSTB governing board at their meetings on December 18, 2025, and January 22, 2026, respectively.

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| **Activity** | **Timing** |
| Fieldwork | October 2025 |
| Finalize financials | Mid November |
| Presentation to Finance/Audit Committee | December 18, 2025 |
| Presentation to Board of Directors | January 22, 2026 |

CSTB will make a draft schedule of Expenditures of Federal Awards for its fiscal year ending June 30, 3025 available upon contract execution.

1. All work papers, statements, schedules, reports, and memoranda made by the accounting firm in the course of the conduct of the audit duties shall be and remain the property of the accounting firm. However, FloridaCommerce has mandated that copies of internal control work papers must be provided to CSTB in electronic format at the completion of each audit so that FloridaCommerce may review the work papers.
2. The work papers and related documents must be maintained and made available for inspection for a period of five (5) years from the date of the completion of the audit report or after all findings, claims, etc., have been closed, whichever is later. These records must be made available within a reasonable period of time at CSTB's Administrative office.
3. The accounting firm shall permit the appropriate divisions of the State of Florida; the Governor of the State of Florida; the United States Secretary of Labor; the United States Secretary of Health and Human Services; the Inspector General of the United States Department of Labor; the Inspector General of the Department of Health and Human Services; the United States Comptroller General; the United States General Accounting Office; or their designated representatives to have access to and make copies of the work papers and documents related to the professional services rendered. Copying costs will be borne by the requesting agency.

## B.2 ADDITIONAL SERVICES

If, during the contractual period, additional services are needed as a result of changes in legislation or other regulatory requirements, the proposer may, at the option of the Organization, be engaged to perform these services.

All additional work will be documented by engagement letters to be approved by the Organization management. The proposer will be compensated in accordance with the schedule of fees established as a result of the RFP. The fee for additional services shall be separately negotiated at the time of the engagement for a not-to-exceed amount.

Auditors will attend, via telecom or in person, any meetings with the CSTB Board or Finance/Audit Committee as directed by the Board or CSTB.

# **SECTION C - INSTRUCTIONS TO RESPONDENTS**

## C.1 GENERAL INFORMATION

This RFP is a solicitation and not an offer to contract. Interested parties desiring to provide proposal for Audit and Tax Services as described in this RFP must submit responses to CareerSource Tampa Bay in the following manner:

1. Inquiries regarding this RFP should be submitted electronically to: rfp@careersourcetb.com Please type “INQUIRY – RFP 25-0255 Audit & Tax Services Solicitation” in the subject line. Questions must be received by noon on July 18, 2025. Responses will be posted to the website.
2. Submit your proposal electronically by attaching documents in PDF format in a version compatible to Acrobat PDF. Documents should be clearly marked with the respondent’s business name and address. Please type “Response to RFP 25-0255 Audit and Tax Services” in the subject line.
3. Proposals must be submitted electronically to: rfp@careersourcetb.com no later than 1:00 PM (EST), on August 4, 2025.
4. To maintain integrity of the process, proposers must only submit questions and proposal to the email address stated above. Proposers are not to copy or blind copy any other CareerSource Tampa Bay official, employee or board member. Violating these conditions may render the submitted proposal disqualified and subject to no further review.
5. Responses by telephone, or fax will not be accepted. Such responses will be rejected as non-responsive, regardless of when such responses are received. Respondents are cautioned that they are responsible for delivery to the specific email address cited above.
6. Any proposal may be withdrawn until the date and time set above for final submission of proposals. Any proposals not so withdrawn will constitute an irrevocable offer, for a period of 90 days, to provide the services set forth in this RFP, or until one or more of the proposals have been awarded. Preparation costs for responses to this RFP are solely those of the respondent, and CareerSource Tampa Bay assumes no responsibility for any such costs.

Please do not contact CSTB to check on the status of proposals.

## C.2 TIMELINE

All times listed reflect Eastern Standard Time (EST). These dates are estimates only and are subject to change by CSTB without recourse. CSTB reserves the right to conduct respondent interviews if necessary at a date to be determined.

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| **Events** | **Date** |
| Release of Request for Proposals made available on the CSTB website: [Requests for Proposals - CareerSource Tampa Bay](https://careersourcetampabay.com/about-us/how-to-work-with-us/) | July 9, 2025 |
| Technical questions/inquiries must be received by noon. CSTB will make every effort to post responses within three (3) business days to the CSTB website.  | July 21, 2025 |
| Proposal due by 1:00 pm | August 4, 2025  |
| CSTB Finance/Audit Committee approval of CPA Firm | August 28, 2025 |
| CSTB Board approval of CPA firm | September 18, 2025 |
| Contract negotiations and final contract drafted  | September 30, 2025 |

**It is the proposer’s responsibility to visit the CSTB website to view answers to submitted questions and any potential modifications and clarifications to this RFP. Do not email for update.**

## C.3 PROPOSAL FORMAT

In responding to this RFP, each Respondent should review and account for all the requirements contained within this RFP. The proposal will require a response of the following and follow the format and order listed:

**Title Page**

The title page must include, at a minimum:

* 1. The title and number of the RFP;
	2. The Respondent’s name (person, organization and firm);
	3. The name, title, phone number and address of the person who can respond to inquiries regarding the reply; and
	4. The signature of the Respondent with authorized signatory.
	5. The date
	6. The FEID/FEIN and SAM/Unique Entity ID # of Respondent

**Table of Contents**

Include a clear identification of the material included in the proposal by section and page number.

**Organization’s Information**

Respondent must provide the following information:

1. Describe its organization, size, and structure.
2. Indicate whether the firm is in compliance with the registration, licensure and permit requirements to practice as a public accounting firm in the State of Florida.
3. Indicate the location of the office from which the work is to be done and the number of partners and other professional staff employed at that office who have the experience and capacity to perform the services requested in this RFP.
4. Include a copy of its most recent peer review.
5. Has any complaint or disciplinary action been initiated against proposer’s Firm or a Partner, by the Florida State Board of Accountancy, or other oversight body during the past three (3) years? If yes, please explain.

**Organization’s Prior Audit Experience and References**

Respondent must provide the following information:

1. Respondent must describe its prior auditing experience including the names, addresses, contact persons email and telephone numbers, and service dates of organizations of similar size and services provided that are similar in nature to those requested in this RFP. Respondent must provide three (3) within the last five (5) years.

**Audit Team**

Respondent must provide the following information:

1. Number of employees assigned to the audit. Including their title, role, and percentage of time working on the audit.
2. Explain how the firm will oversee and supervise the audit team.
3. Provide summaries of the qualifications of the auditors to be assigned to the engagement. Experience relevant to the services to be provided under this RFP should be included.
4. Indicate experience in performing audits of 1) not-for-profits 2) audits under 2 CFR 200 Part F and 3) federal grant audit experience with an emphasis on welfare or workforce grants.
5. Indicate the relevant educational background of each individual to be assigned to the performance of the audit including seminars and courses attended within the past three (3) years and whether the audit team member is in compliance with single audit continuing professional education requirements
6. The State in which audit team member has an active CPA or indicate not licensed, if applicable.

Upon acceptance by CSTB, the selected Respondent may not otherwise substitute personnel for those listed without the prior written approval of the CSTB. The Respondent should provide evidence that each person submitted for this project has previous experience with similar tasks on other equivalent engagements. Respondent should identify the specific individuals who would serve on a day-to-day basis as a primary point of contact and be responsible for the work product of the proposer. The individual identified shall be available within 24 hours (or one business day) notice by telephone or email to attend meetings, respond to telephone calls or respond to specific inquiries.

**Scope of Work to be Performed**

Respondent must provide the following information:

1. Describe its understanding of the scope of work to be performed, including audit procedures, estimated hours and other relevant information.
2. Provide a work plan that includes an explanation of the audit methodology to be followed in order to perform the services required within the established time period.

**Price Reply**

The Respondent must provide an all-inclusive price that includes all travel, report production and other miscellaneous expenses. If a service category is not listed, please add. Prices must be provided for the option of CSTB engaging the CPA Firm for year two (2) through year five (5). All prices must be firm for the term of the contract.

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| Service | June 30, 2025 | June 30, 2026 | June 30, 2027 | June 30, 2028 | June 30, 2029 |
| Financial Statement Audit |  |  |  |  |  |
| Federal Single Audit |  |  |  |  |  |
| FloridaCommerce Procedures |  |  |  |  |  |
| Audit procedures for the initial audit and merger of LWDB 14 and 15, as deemed necessary |  | N/A | N/A | N/A | N/A |
| Preparation of IRS Form 990 |  |  |  |  |  |

Respondent to specify the hourly rates used to provide the above prices for each annual period. Add positions not listed.

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| --- | --- | --- | --- | --- | --- |
| Professional Level | June 30, 2025 | June 30, 2026 | June 30, 2027 | June 30, 2028 | June 30, 2029 |
| Partner |  |  |  |  |  |
| Senior Manager |  |  |  |  |  |
| Manager |  |  |  |  |  |
| In-Charge/Senior |  |  |  |  |  |
| Administrative |  |  |  |  |  |
| Other: Describe |  |  |  |  |  |

 If a proposer is a for profit entity, profit must be separately stated.

**Small businesses, minority-owned firms, and women’s business enterprises**

Whenever possible, CSTB shall make positive efforts to utilize small businesses, minority-owned firms, and women’s business enterprises, in procuring audit services as stated in 2 CFR 200, Section 200.321 – Contracting with Small and Minority Businesses, Women’s Business Enterprises, and labor surplus area firms, or the FAR (48 CFR part 42), as applicable. Small businesses, Minority and female-owned businesses are encouraged to apply. No individual shall be excluded from participation in, denied benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with any services provided under the RFP because of race, color, religion, sex, national origin, age, handicap, or political affiliation or belief.

Respondent must either attach a copy of your Certified Minority Business Enterprise (CMBE) Certification, if certified with the Florida Department of Management Services or respond, Not applicable.

**Attachments**

Replies to this RFP must include the following documents and certifications:

• **Relationship Disclosure Form (Attachment 1)**. Completed, signed, and attached by authorized individual for Respondent.

• **Contractor Provisions, Certifications and Assurances (Attachment 2)** CareerSource Tampa Bay does not award a contract where Contractor has failed to accept the CONTRACTOR PROVISIONS, CERTIFICATIONS AND ASSURANCES contained in this Attachment.

**SECTION D – EVALUATION CRITERIA**

All complete proposals will be evaluated according to the guidelines set forth in this RFP. All bids will be evaluated based on responsiveness to this RFP. Negotiations will be started with the bidder(s) whose proposal(s) has been judged most appropriate with regard to all factors, including audit service quality, total cost, and audit experience. The lowest priced proposal will not necessarily be selected, as cost is only one of the factors that will be considered. An established history of past satisfactory experience in doing business in Florida as confirmed by positive evaluations by references and comparison of the Respondent’s proposals will contribute to the selection. The following criteria will form the basis upon proposals are evaluated:

|  |  |
| --- | --- |
| **Criteria** | **Maximum Points** |
| Respondent firm and audit team have the experience to provide the services being procured.  | 45 |
| Scope of Work to be performed demonstrates: * Aptitude for management and completion of the engagement.
* Understanding of the work to be performed
 | 40 |
| Cost  | 15 |
| Small businesses, minority-owned firms, and women’s business enterprises  | 5 |
| Total Points | **105** |

**SECTION E – CONDITIONS AND LIMITATIONS OF THIS RFP**

The following conditions are applicable to all proposals:

This RFP does not commit or obligate CareerSource Tampa Bay to award a contract, to commit any funds identified in this RFP document, to pay any costs incurred in the preparation or presentation of a proposal to this RFP, to pay for any costs incurred in advance of the execution of a contract, or to procure or contract for services or supplies.

CareerSource Tampa Bay reserves the right to reject any and all proposals in whole or in part, to waive any informalities or irregularities in the proposals received, and to accept any proposal that is deemed most favorable.

CareerSource Tampa Bay at the time and under the conditions stipulated in the specifications of this request. Non-conforming proposals will be considered non-responsive and CareerSource Tampa Bay reserves the right to waive informalities and minor irregularities in proposals received.

CareerSource Tampa Bay reserves the right to request additional information for clarification from potential candidates, or to allow corrections for errors or omissions.

All proposals are subject to negotiation by CareerSource Tampa Bay.

CareerSource Tampa Bay reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the individual or firm of the conditions contained in this solicitation, unless clearly and specifically noted in the proposal/quote submitted and confirmed in the contract between CareerSource Tampa Bay and the individual or firm selected.

CareerSource Tampa Bay may require the selected proposer to participate in negotiations, and to submit price, technical, or other revisions for the proposals in writing, which may result from negotiations.

A meeting will be held by an Evaluation Team to discuss proposals and develop recommendations. At this meeting, prospective providers may be invited to explain their proposals as needed. The Evaluation Team completes the review sheets and determines final recommendations for providers(s). Review sheet totals do not necessarily determine the outcome but serve as a tool for reviewers to formulate ideas for discussion.

CareerSource Tampa Bay reserves the right to further negotiate terms and conditions, including price with the highest ranked proposer. If the Evaluation Team cannot reach a mutually beneficial agreement with the first selected proposer, the Team reserves the right to enter into negotiations with the next highest ranked proposer and continue this process until agreement is reached.

**SECTION F – APPLICABILITY OF SUNSHINE LAWS**

Pursuant to Section 445.007, Florida Statutes, regional workforce boards (including CareerSource Tampa Bay) are subject to Florida Sunshine Laws (chapters 119 and 286 and s. 24, Art. I of the Florida State Constitution). The respondents acknowledge that CareerSource Tampa Bay is subject to Florida’s Public Records and Sunshine Laws. Accordingly, materials produced by the respondents under this RFP, as well as certain meetings and other communications, are subject to such laws.

**SECTION G – APPEAL PROCEDURES**

From the date and time of selection/notice of intent to award, a bidder has 72 hours (3 business days) to file a written appeal/protest with the CEO. (If unresolved by the CEO, the issue will be escalated to individuals selected by the Executive Committee. The decision of this Executive Committee is final.

# **ATTACHMENT 1 RELATIONSHIP DISCLOSURE FORM**

**Relationship Disclosure Form**

The purpose of this form is to document any personal or business relationships between the Respondent (defined below) and any one or more of the following: (i) CareerSource Tampa Bay’s current Board of Directors; and (ii) an employee of CareerSource Tampa Bay. Please click on the below link for a listing of CareerSource Tampa Bay’s current Board members.

 <https://careersourcetampabay.com/about-us/board-of-directors/>

**QUESTIONS AND ANSWERS ABOUT THE RELATIONSHIP DISCLOSURE FORM**

**WHAT INFORMATION NEEDS TO BE DISCLOSED ON THE RELATIONSHIP DISCLOSURE FORM?**

The relationship disclosure form needs to disclose pertinent background information about the Respondent and his/her or personal or business relationship, if any, with any CareerSource Tampa Bay staff or Board member. Respondents must disclose whether any of the following relationships exist: (1) Respondent is a relative of a CareerSource Tampa Bay staff or Board member; (2) a CareerSource Tampa Bay Board member is an employee of Respondent; (3) Respondent is an employee of CareerSource Tampa Bay; or (4) Respondent is a business associate of any CareerSource Tampa Bay Board member.

**HOW ARE THE KEY RELEVANT TERMS DEFINED?**

*Respondent* means the individual(s) or firm making any proposal pursuant to this RFP/RFQ

*Business associate* means any person or entity engaged in or carrying on a business or commercial activity with any other person who is a CareerSource Tampa Bay staff or Board member, whether as an independent contractor, co-owner, partner, member, trustee or beneficiary, joint venture, vendor, consultant, service provider, officer, director or shareholder (excluding shares traded on a regulated national or regional securities exchange).

*Employee* means any person who receives remuneration from an employer for the performance of any work or service while engaged in any employment under any appointment or contract for hire or apprenticeship, express or implied, oral or written, whether lawfully or unlawfully employed, and includes, but is not limited to, aliens and minors. (See Section 440.02(15), Florida Statutes)

*Relative* means an individual who is related to a CareerSource Tampa Bay staff or Board member as father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half-brother, half-sister, grandparent, great grandparent, grandchild, great-grandchild, step-grandparent, step-great-grandparent, step-grandchild, step-great-grandchild, person who is engaged to be married to a CareerSource Tampa Bay Principal or who otherwise holds himself or herself out as or is generally known as the person whom a CareerSource Tampa Bay Principal intends to marry or with whom the CareerSource Tampa Bay Principal intends to form a household, or any other natural person having the same legal residence as the CareerSource Tampa Bay Principal. (See Section 112.312(21), Florida Statutes.)

**DOES THE RELATIONSHIP DISCLOSURE FORM NEED TO BE UPDATED IF INFORMATION CHANGES?**

Yes. It remains a continuing obligation of the applicant to update this form whenever any of the information provided on the initial form changes until a vendor is selected.

**WHO WILL REVIEW THE INFORMATION DISCLOSED ON THE RELATIONSHIP DISCLOSURE FORM AND ANY UPDATES?**

The information disclosed on this form and any updates will be a public record as defined by Chapter 119, Florida Statutes, and may therefore be inspected by any interested person. Also, the information will be made available to the Board of Directors and the Executive Director of CareerSource Tampa Bay.

**RELATIONSHIP DISCLOSURE FORM**

*This form must be completed by the Respondent. In the event any information provided on this form should change, the Respondent must file an amended form on or before the date the item is considered by CareerSource Tampa Bay.*

**Part I**

**INFORMATION ON RESPONDENT:**

 Legal Name of Respondent: ­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Business Address (Street/P.O. Box, City and Zip Code):

 Business Phone ( )

 **Part II**

 **IS RESPONDENT A RELATIVE OF ANY CAREERSOURCE TAMPA BAY PRINCIPAL? YES \_\_NO**

 **IS ANY CAREERSOURCE TAMPA BAY PRINCIPAL AN EMPLOYEE OF RESPONDENT? YES \_\_\_NO**

 **IS RESPONDENT AN EMPLOYEE OF ANY CAREERSOURCE TAMPA BAY PRINCIPAL? YES \_\_\_NO**

**IS RESPONDENT A BUSINESS ASSOCIATE OF ANY CAREERSOURCE TAMPA BAY PRINCIPAL? \_\_YES \_\_\_\_NO**

If you responded “YES**”** to any of the above questions, please state with whom and explain the relationship:

(*Use additional sheets of paper if necessary*)

**Part III**

I hereby certify that information provided in this relationship disclosure form is true and correct based on my knowledge and belief. If any of this information changes, I further acknowledge and agree to amend this relationship disclosure form prior to the date on which CareerSource Tampa Bay awards an agreement. In accordance with s. 837.06, Florida Statutes, I understand and acknowledge that whoever knowingly makes a false statement in writing with the intent to mislead a public servant in the performance of his or her official duty shall be guilty of a misdemeanor in the second degree, punishable as provided in s. 775.082 or s. 775.083, Florida Statutes.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Respondent Print Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title Date

# **ATTACHMENT 2 CONTRACTOR PROVISIONS, CERTIFICATIONS AND ASSURANCES**

By signing below, Respondent hereby certifies and assures that it will fully comply with all provisions, certifications, and assurances of this Attachment if contract is awarded.

If the Respondent is unable to comply in whole or part with the below, the Respondent is to cite the section number, detail the requirement that cannot be met and provide an explanation with the signed Attachment.

1. **CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTION (29 CFR 98)**. The prospective Contractor certifies to the best of its knowledge and belief, that it and its principals: a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency; b. Have not within a three-year period preceding this Contract been convicted or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; c. Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph above; and/or d. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause of default.
2. **CERTIFICATION REGARDING LOBBYING (29 CFR Part 93)**. The prospective Contractor certifies, to the best of his or her knowledge & belief, that: No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying,” in accordance with its instructions.
3. **NON-DISCRIMINATION & EQUAL OPPORTUNITY ASSURANCE (29 CFR Part 37)**. As a condition to the award of financial assistance from the Department of Labor under Title I of the WIOA, the grant applicant assures that it will comply fully with the nondiscrimination and equal opportunity provisions of the following laws: a. Section 188 of the Workforce Innovation and Opportunity Act (WOIA) which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, political affiliation, or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title I financially assisted program or activity; b. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the bases of race, color and national origin; c. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination against qualified individuals with disabilities; d. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age; and e. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of sex in educational programs; and f. Section 654 of the Omnibus Budget Reconciliation Act of 1981 as amended, (42 U.S.C. 9849),as amended, which prohibits discrimination on the basis of race, creed, color, national origin, sex, handicap, political affiliation or beliefs.
4. **ACCESS TO RECORDS**. Access by CareerSource Tampa Bay, the Comptroller General of the United States or any of their duly authorized representatives must be given to any books, documents, papers and records (including computer records) of prospective Contractor or sub-contractor which are directly pertinent to charges to the services, in order to conduct audits and examinations and to make excerpts, transcripts and photocopies; this right also includes timely and reasonable access to Contractor’s and subcontractor’s personnel for the purpose of interviews and discussions related to such documents.
5. **OFFICE OF MANANGEMENT AND BUDGET (OMB) CIRCULAR.** Prospective Contractor agrees that, if applicable, it shall comply with all applicable OMB circulars, such as 2 CFR 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.
6. **DAVIS-BACON ACT.** Prospective Contractor will comply, as applicable, with the provisions of the Davis-Bacon Act, as amended (40 U.S.C. 276a to 276a7) and as supplemented by Department of Labor (DOL) regulations 29 CFR part 5, the Copeland Anti Kick Back Act (40 U.S.C 276c and 18 U.S.C. 874) as supplemented by DOL regulations (29 CFR part 3), and the Contract Work Hours and Safety Standards Act (40 U.S.C. 327-333) as supplemented by DOL regulations 29 CFR part 5, regarding labor standards for federally assisted construction sub-agreements.
7. **AMERICAN WITH DISABILITIES ACT.** Prospective Contractor will comply with the Americans with Disabilities Act of 1990, P.L. 101-336, which prohibits discrimination on the basis of disability and requires reasonable accommodation for persons with disabilities; in all employment practices, including job application, procedures, hiring, firing, advancement, compensation, training, and other terms, conditions, and privileges of employment. It applies to recruitment, advertising, tenure, layoff, leave, fringe benefits, and all other employment-related activities.
8. **EXECUTIVE ORDER 11246**. Executive Order 11246, as amended by Executive Order 11375, requires that Federal Contractor and Subcontractors not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. It also requires the Prospective Contractor/Subcontractor to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, sexual orientation, gender identity, or national origin.
9. **PUBLIC ANNOUNCEMENTS AND ADVERTISING.** When issuing statements, press releases, request for proposals, bid solicitation, and other documents describing the project or programs funded in whole or in part with Federal money, all Prospective Contractors receiving Federal funds, shall clearly state: (1) the percentage of the total cost of the program or project which will be financed with Federal money, and (2) the dollar amount of Federal funds for the project or program.
10. **TERMINATION FOR DEFAULT/CONVENIENCE**. a. Either party may request termination upon 60 days prior written notice to the other party. Written notification of termination be by registered mail, return receipt requested. b.CSTB may unilaterally terminate or modify the Agreement, if for any reason the U.S. Department of Labor or the State of Florida reduces funding through the grants under which the Agreement is funded. c. CSTB may unilaterally terminate the Agreement at any time that it is determined that: a. Contractor fails to provide any of the service it has contracted to provide; or b.Contractor fails to comply with the provisions of this modified agreement; or c. Such termination is in the best interest of the Board. In the event the Agreement is terminated for cause, Contractor shall be deemed to be in default and liable for damages sustained for any breach of this agreement by the Contractor, including court costs and attorney fees, when cause is attributable to the Contractor.
11. **CONFIDENTIALITY.** It is understood that the Prospective Contractor shall maintain the confidentiality of any information, regarding CareerSource Tampa Bay customers and the immediate family of any applicant or customer, that identifies or may be used to identify them and which may be obtained through application forms, interviews, tests, reports from public agencies or counselors, or any other source. Contractor shall not divulge such information without the written permission of the customer, except that such information which is necessary as determined by CareerSource Tampa Bay for purposes related to the performance or evaluation of the Agreement may be divulged to CareerSource or such other parties as they may designate having responsibilities under the Agreement for monitoring or evaluating the services and performances under the Agreement, or to governmental authorities to the extent necessary for the proper administration of the law. All release of information shall be in accordance with applicable State laws, and policies of CareerSource Tampa Bay. No release of information by Contractor, if such release is required by Federal or State law, shall be construed as a breach of this Section.
12. **E-VERIFY**. Prospective Contractor warrants and represents that it is in compliance with section 448.095, Florida Statutes, as may be amended, and that it: (1) is registered with the E-Verify system (E- Verify.gov), and beginning January 1, 2021, uses the E-Verify system to electronical[y verify the employment eligibility of all newly hired workers; and (2) has verified that all of Contractor's subcontractors performing the duties and obligations of the Agreement are registered with the E-Verify System, and beginning January 1, 2021, use the E-Verify System to electronically verify the employment eligibility of all newly hired workers
13. **Public Entity Crimes.** The Prospective Contractor 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 Contractor also represents that it is not prohibited from entering into this Agreement by Section 287.133, Florida Statutes. Discovery or proof of the contrary will result in immediate contract termination by CSTB.
14. **Discriminatory Vendor List**.The Prospective Contractor/Subcontractor hereby represents and warrants that it has not been listed on the discriminatory vendor list as described in section 287.134, Florida Statutes. Discovery or proof of the contrary will result in immediate contract termination by CSTB.
15. **Prohibition on certain telecommunications and video surveillance services or equipment.** Prospective Contractor agrees to comply with the provisions of 2 CFR Appendix II part 200 and 2 CFR part 200.216 and the requirements stated therein.
16. **Domestic preferences for procurements**. As appropriate and to the extent consistent with law, the non-Federal entity should, to the greatest extent practicable under a federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award. For purposes of this section: 1)“Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.2)“Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

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Name and Title of Authorized Representative

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Signature of Authorized Representative

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Organization/ Business Name

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Date