



THIS AGREEMENT between **TAD Grants (or Contractor)** and **Tampa Bay Workforce Alliance, Inc. dba CareerSource Tampa Bay (CareerSource Tampa Bay)** is effective on the last date signed by both parties through June 30, 2026 or completion of scope of work, whichever is earlier.

STATEMENT OF WORK

The parties hereto agree that Contractor shall provide (I) Certified Business Services Consultant™ (CBSC) training (II) Business Services Review, Evaluation, and Recommendation and (III) Business Services Consultant Handbook as described below.

I. Certified Business Services Consultant™ (CBSC)

Contractor will deliver the Certified Business Services Consultant™ training and content to staff designated by CareerSource Tampa Bay, as follows:

- A. CBSC training, materials, certification review and certificate fee for up to twenty (20) CareerSource Tampa Bay staff members.
- B. Two (2) face-to-face sessions totaling approximately twelve (12) hours. These sessions will be held from 9:00 am – 4:00pm (with appropriate time given for a lunch break):
 - o Location: 9215 N. Florida Avenue, Tampa, FL, 33612 and agreed upon by both parties
 - o Dates: 10/16/25 (Thursday) & 10/17/2025 (Friday)

NOTE: CareerSource Tampa Bay agrees to provide TAD Grants with a complete list of student names and email addresses no later than October 1, 2025 or 14 days prior to the scheduled start date of the training.

- C. CSBC to provide CareerSource Tampa Bay a list of students who complete the training and a copy of the certificates of each student.

Course Overview

TAD Grants is pleased to offer training that will culminate in the nationally recognized Certified Business Services Consultant™ (CBSC) certification, upon completion of the course requirements, utilizing its Business Services Consultant curriculum (Curriculum). CBSC certification and Curriculum can only be offered by TAD Grants.

This dynamic training is designed to provide Workforce Development Professionals with the skills and strategies they need to deliver high quality, customer focused Business Services. Attendees will be taught the four phases of CBSC™ process, gain tools that enable them to deliver Business Services effectively and efficiently, improving placement outcomes as well as customer satisfaction.

Unlike other business services training, this is intended to provide practical application for professionals engaged in working with employers on a daily basis. Each step of the process is intended to provide attendees with a clear and defined process that can be replicated with consistency and efficacy.

The Curriculum was developed with input from leaders and practitioners within the Workforce and Economic Development Industries to ensure fidelity and applicable value in the field. Those that successfully complete the training and demonstrate their competence through their documented application of knowledge will earn their certification while raising the professional standards for Business Services across the country. This course is pre-approved for continuing education hours for those that hold the Global Career Development Facilitator (GCDF) credential by the *Center for Credentialing & Education*.

Sole Source

Certified Business Services Consultant™ certification and curriculum is proprietary. Certification and curriculum cannot be offered by another vendor.

On November 7, 2017, TAD Grants was granted official ownership of the Certified Business Services Consultant™ name and logo associated with this designation by the United States Patent and Trademark Office.

The registration number 5,331,811 is filed under CLASS 41: Competency based, professional development training and certification for those seeking to enhance their skills and knowledge in the delivery of business services.

This trademark ensures that professional development training in business services can only result in receiving the Certified Business Services Consultant (CBSC™) designation when provided directly through TAD Grants.

II. Business Services Review, Evaluation and Recommendation

TAD Grants will be onsite on Wednesday, 10/15/25. Additional remote meetings will be coordinated with CareerSource Tampa Bay, as needed.

- A. Review existing Business Services processes, procedures and third party reporting/recommendations.
- B. Meet with identified business services staff on site to review real time business services processes, identify current system challenges and strengths.
- C. Provide consultation to the CareerSource Tampa Bay President and CEO with written observations and recommendations for Business Services Model structure process including roles and functions/communication among all program positions.

III. Business Services Consultant Handbook

TAD Grants will, in close collaboration with CareerSource Tampa Bay, develop a Business Services Consultant Handbook (Handbook) that will include the following:

- A. Overview of the purpose and importance of Business Services as it relates to the CareerSource mission and the improvement of the public workforce system.
- B. Overview of the role and responsibilities of the Business Services Consultant.
- C. The CBSC four step process will be used as a guide to define the process for BSC's.
- D. Operational Procedures:
 1. Approved Marketing Procedures and Materials (electronic links to materials and process for marketing material approval).

2. Introduction to the Business Needs Assessment and instructions on how to complete it and where the data is to be stored.
 3. Instructions for how and when to complete the Business Solutions Plan and where the plan is to be stored.
 4. Step by Step instructions for completing documentation for On-the-Job Training, Incumbent Worker Training, Internship, Work Experience etc. Including qualifications and eligibility for each type of supplemental employment programs.
 5. Instructions for how to conduct follow up, what tools should be used for follow up and how to use them for data collection and documentation.
- E. Final Handbook. Targeting to provide Handbook that has been approved by CareerSource Tampa Bay by end of March 2026.
- F. Up to three (3) revisions of the Handbook for a period of two years from the date the approved handbook is received by CareerSource Tampa Bay President and CEO. Revisions pertain to updates of outdated information to keep the handbook current.

FEE, INVOICE, AND PAYMENT PROVISIONS

For delivery of services as defined under the STATEMENT OF WORK, the following fee, invoicing, and payment provisions apply:

1. Fee. CareerSource Tampa Bay agrees to pay TAD Grants a fixed fee of \$40,500 for travel and deliverables defined under the STATEMENT OF WORK. \$40,500 is an all -inclusive rate, there will be no additional fees or charges associated with the execution of the STATEMENT OF WORK. Any additional services requested of TAD Grants by CareerSource Tampa Bay will be negotiated in a separate and unrelated contract. If CareerSource Tampa Bay CSBC Trainees exceed twenty (20), the cost of \$1,050/student will be in addition to the \$40,500.
2. Invoice & Payment. TAD Grants will email invoice to munroa@careersourcetb.com upon completion of deliverables as denoted below. Payment will be processed net 30 days from receipt of invoice assuming deliverables have been complete.

Scope of Work	Expected Invoice to CSTB	Amount	Deliverables
I. CBSC II. Business Services Review, Evaluation, and Recommendation	10/13/25	\$22,500	I. CBSC training completed and CBSC certificates have been provided to all CareerSource Tampa Bay staff who have completed the coursework to obtain a CBSC certification. II. Business Services Review, Evaluation, and Recommendation: Written observations and recommendations for Business Services Model structure process including roles, functions and communication among all program positions delivered to CareerSource Tampa Bay President and CEO.
III. Business Services Consultant Handbook	4/21/26 (1)	\$18,000	III. Business Services Consultant Handbook: Final approved Handbook provided to CareerSource Tampa Bay President and CEO.

(1) 21 days from the date the approved Handbook has been received by CareerSource Tampa Bay. Targeting receipt by end of March 2026

INDEPENDENT CONTRACTOR

This Agreement shall not render the Contractor an employee, partner, agent of, or joint venture with CareerSource Tampa Bay for any purpose. The Contractor is and will remain an independent contractor in their relationship to CareerSource Tampa Bay and in performing the services under the STATEMENT OF WORK.

TAD Grants shall be solely responsible for any and all taxes, Social Security contributions or payments, worker's compensation, disability insurance, unemployment taxes, and other payroll type taxes applicable to such compensation.

INDEMNIFICATION

CareerSource Tampa Bay understands that there may be activities of minimal physical exertion and TAD Grants does not assume responsibility or liability, including attorney fees, relating to the injury or death to any person or damage to any property from such activities. CareerSource Tampa Bay will hold the Contractor's consultant team harmless against any and all such liability. The Contractor's consultant team agrees to take all necessary precautions to prevent injury to any persons or damage to property during the term of this Agreement. TAD Grants holds CareerSource Tampa Bay harmless against errors of omission on the part of the TAD Grants in the performance or failure to perform the STATEMENT OF WORK in this Agreement, excepting only those losses which are due solely and directly to CareerSource Tampa Bay negligence or described above.

TERMINATION

In the event that either entity wants to terminate the agreement prior to the end of the agreement period a seven (7) calendar day notice must be submitted in writing and all services rendered up to the written notice through the end date of the agreement specified in the early termination notice, will be reimbursed within 20 calendar days of the termination date.

By signature below, parties agree to the terms and conditions of this Agreement:



Tressa A. Dorsey, President

TAD Grants

09/05/2025

Date



Keidrian Kunkel (Sep 8, 2025 09:01:31 EDT)

Keidrian Kunkel, President and CEO

CareerSource Tampa Bay

09/08/2025

Date



ADDENDUM ASSURANCES AND CERTIFICATIONS

The “Addendum - Assurances and Certifications” ensure the inclusion and acknowledgment of the required Federal and State contracting requirements that must be included in a Contract made by Tampa Bay Workforce Alliance, Inc. dba CareerSource Tampa Bay (hereinafter referred to as “CSTB”) that are funded by Federal or State awards.

This Addendum is part of the Professional Services Agreement (Contract) by and between TAD Grants (Contractor) and CSTB, each a party and collectively parties to the Contract, attached hereto, for (I) Certified Business Services Consultant™ (CBSC) training (II) Business Services Review, Evaluation, and Recommendation and (III) Business Services Consultant Handbook Certified digital marketing campaign services.

In consideration of the mutual covenant and stipulations set forth in the Contract and Addendum herein, the parties agree as follows:

1. Termination for Cause and Convenience

- a. Termination for Convenience. Terms and conditions are reflected in the Contractor agreement.
- b. Termination Due to Lack of Funds: If for any reason funds to finance the Contract are reduced, suspended or terminated, in whole or in part, funding for this contract may cease. CSTB shall provide no less than thirty (30) business day’s written notice of such termination.
- c. Termination for Breach: CSTB or Contractor may terminate the Contract when it has determined that either party has failed to provide any of the services specified therein in a timely or proper fashion, failed to perform in whole or in part, or has violated any stipulations of the Contract. The party alleging the breach shall notify the other party of such in writing. Depending on the situation and cause for the breach of Contract, CSTB may either unilaterally cancel the contract immediately or allow the Contractor ten (10) business days from receipt of notice in which to respond with a plan agreeable to CSTB to correct said deficiencies. Upon failure of Contractor to respond within the appointed time or failure of Contractor to respond with appropriate plans, CSTB will serve a termination notice that shall become effective within fifteen (15) business days after its issuance. In the event of such termination, CSTB shall be liable for payment only for services rendered prior to the effective date of termination. Final billing for payment must be received by CSTB within forty-five (45) calendar days of termination date. Contractor shall provide CSTB with written notice of any perceived breach and extend CSTB ten (10) business days to cure any perceived breach under the Contract.

2. Debarment and Suspension

The Contractor certifies that it is not currently debarred, suspended, or excluded from or participation in Federal assistance program, proposed for debarment, declared ineligible, or



voluntarily excluded from covered transactions by any federal department or agency within a three-year period preceding the effective date of the Contract, in accordance with 29 CFR Part 98. No contract shall be awarded to parties listed on the GSA List of Parties Excluded from Federal Procurement of Non-Procurement Programs.

3. Convicted and Discriminatory Vendor

- a. **Convicted Vendors.** The 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 recovery of all monies paid by CSTB pursuant to the Contract and may result in debarment from CSTB's competitive procurement activities.
- b. **Discriminatory Vendors.** The Contractor hereby represents and warrants that it has not been listed on the discriminatory vendor list as described in section 287.134, Florida Statutes. CSTB hereby materially relies on such representation in entering the Contract. An untrue representation of the foregoing shall entitle CSTB to terminate the Contract and recover from Contractor all monies paid by CSTB pursuant to the Contract and may result in debarment from CSTB's competitive procurement activities.

4. Equal Employment Opportunity

The Contractor assures it will not discriminate in its employment practices and agree that it shall comply with Executive Order 11246, Equal Employment Opportunity Act, as amended by Executive Order 11375 and others, and as supplemented in Department of Labor regulation 41 CFR, Part 60 and 45 CFR, Part 92, if applicable.

5. Prohibition on certain telecommunications and video surveillance services or equipment.

The 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.

6. Domestic preferences for procurement

The Contractor agrees to comply with the provisions of 2 CFR Appendix II part 200 and 2 CFR part 200.322 and the requirements stated therein, as applicable.

7. Public Records and Records Retention

- a. The Contractor is subject to Chapters 119 and 286 of the Florida Statutes and is responsible for responding to public records requests and subpoenas.
- b. The Contractor shall retain sufficient documentation to substantiate claims for payment under the Contract and all other records, electronic files, papers and documents that were made in relation to this Contract. Contractor shall retain all documents related to this Contract in compliance for a period of five years from the date final payment under the Contract is received. In addition, if any litigation, claim, negotiation, audit, or other action involving the records has been started prior to the expiration of the five-year period as identified above, the records shall be retained until completion of the action and resolution of all issues which arise from it, or until the end of the controlling period as identified above, whichever is longer.

IF CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT



THE CUSTODIAN OF PUBLIC RECORDS AT 813-397-2064,
munroa@careersourcetb.com, 4350 West Cypress Street, Suite 875, Tampa FL
33067.

8. Procurement of Recovered Materials

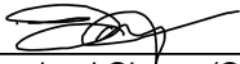
The Contractor agrees to comply with the provisions of 2 CFR Appendix II part 200 and 2 CFR part 200.233 and the requirements stated therein, as applicable.

9. Severability

If any provision of this Addendum, whether in whole or in part, is held to be void or unenforceable by a Court of competent jurisdiction, that provision will be enforced only to the extent that it is not in violation of law or is not otherwise unenforceable, and all other provisions will remain in full force and effect.

10. Certification and Assurance

By signing below, Contractor hereby certifies and assures that it will fully comply with the provisions listed above.



Authorized Signer (Signature)

Tressa A. Dorsey, President

Printed Name & Title

09/05/2025

Date

