



**April 12, 2018- 11:00 AM**  
**13805 58<sup>th</sup> Street North, Clearwater, FL.**  
Conference Dial: 1-844-815-8411  
Conference Code: 268-750#

## **Compensation Committee**

### Agenda

- I. Welcome and Introductions** ..... Michael Mikurak, Chair
  
- II. Action/Discussion Items**
  - 1. Approval of Minutes – December 5, 2017 Meeting..... Page 2
  - 2. Incentives for Business Services Staff..... Page 4
  - 3. Compensation and Goals for Interim Directors..... Page 12
  
- III. Other Administrative Matters**  
*(Items of urgency not meeting the seven-day guideline for review)*
  
- IV. Information Items**
  
- V. Public Comments**
  
- VI. Adjournment**

Finance Committee – April 24, 2018  
Executive Committee – May 2, 2018  
Workforce Solutions Committee – May 15, 2018  
One Stop Committee – May 17, 2018  
Science Center Committee – May 25, 2018  
Board of Directors – June 20, 2018



## **CareerSource Pinellas Compensation Committee Meeting**

**Date:** December 5 2017, 12:00 p.m.  
**Location:** Via Teleconference

### **Call to Order**

Chairman Michael Mikurak called the meeting to order at 12:00pm. There was a quorum present with the following Compensation Committee members participating.

### **Committee Members in attendance**

Jack Geller; Aundre Green, Lenne Nicklaus

### **Committee Members not in attendance**

Bill Price

### **Staff Present**

Edward Peachey, Luna Jean-Pierre

### **Guest**

Jon Brethauer.

### **Action Items**

#### **Action Item 1 – Approval of Minutes**

The minutes of November 1<sup>st</sup>, 2017 Compensation Committee meeting was presented for approval.

Motion: Jack Geller

Second: Lenne Nicklaus

*The minutes approved as presented. The motion carried.*

#### **Action Item 2 – Issuance of RFP for 401(k) Retirement Services Advisor**

After a solicitation in 2013, WorkNet selected and hired a 401(k) Retirement Services Advisor to provide education, retirement preparedness advising, investment review and oversight, and personal financial security planning analysis for staff who request such services. As we have had the same Advisor, Roger Machlin, since that solicitation, it is prudent to issue a new RFP for the same and possibly enhanced services.

Motion: Lenne Nicklaus

Second: Aundre Green

*The Compensation Committee recommends to authorize staff to release an RFP for an independent retirement advisor to provide investment advice to individual staff with the stipulation that any respondent must be classified as an ERISA 3(38) fiduciary advisor/manager. Results proposals from that RFP will be brought back to the Compensation Committee for review and approval. The motion carried.*

#### **Action Item 3– Quarterly 401(k) Monitoring Report and Recommendations**

Our organization's 401(k) plan is monitored on a quarterly basis by ProVise Management Group. Attached is their quarterly monitoring report that details all of the funds in WorkNet Pinellas' plan including the holdings summary, fiduciary score, investment performance, etc. In addition, ProVise is recommending some fund changes based on the performance review

Motion: Aundre Green  
Second: Lenne Nicklaus

*The Compensation Committee recommends review of ProVise's quarterly monitoring report and consideration of the proposed recommendations from ProVise. The motion carried.*

**Action Item 4 – Compensation Plan Flexibility**

After approval by the Compensation Committee, Executive Committee, and full Board in August 2016, CareerSource Pinellas adopted a new compensation plan based on the results of a statewide survey conducted by Evergreen Solutions. The survey included the workforce development industry within Florida and throughout the United States as well as similar organizations within the local labor market. Survey data was supplemented by existing salary survey data that was timely, high-quality, reliable and accurate.

One of the recommendations also adopted by the Committees and Board was to “conduct small-scale salary surveys as needed to assess the market competitiveness of hard-to-fill classifications and/or classifications with retention issues, and make adjustments to pay grade assignments if necessary.

Staff have been diligently conducting those small-scale salary surveys as new positions are created for grants and other funding received and when it is recognized that we are having challenges hiring and/or retaining qualified staff at the current rate of pay included in our compensation plan. While the overall compensation plan is not out of date, staff have found several instances that the salary band associated with a particular position, especially those associated with IT and other instructor positions, are no longer competitive as our economy grows and unemployment drops to record levels.

Motion: Lenne Nicklaus  
Second: Aundre Green

*The Compensation Committee recommends giving the President and CEO the authority to offer a salary that is competitive with the market to ensure we attain and retain the talent necessary to continue to be one of the highest performers in the State of Florida and a leader in program results in the Nation. At no time will this compensation authority extend to the point that the budget line item for salaries is exceeded without the review and approval of the Finance Committee. The motion carried.*

**Other Administrative Matters**

None

**Information Item**

None.

**Public Comments**

None.

**Adjournment**

The meeting was adjourned at 12:45 PM.



## Action / Discussion Item 2

### Incentives for Staff within Business Services

#### **Background**

The Account Executives and Recruiters within the Business Services Department of CareerSource Tampa Bay and CareerSource Pinellas have received monthly incentives for the past several years in accordance with a plan approved at the beginning of each program year by the President and CEO. These incentives were in addition to these staff's base salary and were earned based on meeting established measurable monthly goals that were developed annually by the President and CEO and the Director of Business Services and distributed to the staff. Currently there are 7 Account Executives and 15 Recruiters within the Business Services Department of CareerSource Tampa Bay and CareerSource Pinellas that are eligible to earn incentives.

The entry level salary in the compensation plan for these two positions was determined through the study completed by Evergreen Solutions in June 2016. See salary range below:

Position Title	Minimum Salary	Mid Salary	Max Salary
Recruiter	\$40,000	\$ 52,000.00	\$ 64,000.00
Business Account Executive	\$46,600	\$ 60,600.00	\$ 74,600.00

However, due to the potential to earn incentives (up to \$16,800 annually in Program Year 2017-2018), new staff hired into the Recruiter positions were hired at a salary of \$35,000. In all cases in the last several years, Account Executives were promoted from Recruiters within the organization at a salary of \$45,500 and not recruited/hired from external sources.

Examples of the pre-defined goals established for Account Executive and Recruiter positions for this current program year are shown in Attachment I. These goals, included as examples, were adjusted/revised for "specialty" Account Executive and Recruiter positions. Each month staff report their actual results, those results are audited and a comparison against goals is completed. If staff exceed their monthly goals, an established incentive is paid. The incentive plan put into place at the beginning of this program year, July 1, 2017, remains active and the Account Executives and Recruiters continue to earn incentives under this plan.

Account Executive and Recruiters' goals change each year; in one previous year for example, the goals were based on a team's achievements. The average incentive earned and paid to Recruiters and Account Executives in calendar year 2017 was \$5,234.76. Graphs showing the amount of incentives earned and paid to each Recruiter and Account Executive in 2016 and in 2017 are shown in Attachment II. Please note that the incentive plan usually changed mid calendar year with the change in our program year which begins July 1<sup>st</sup> of each year.

No other staff within CareerSource Tampa Bay or CareerSource Pinellas, including other Business Services staff, have the opportunity to earn monthly incentives for work

accomplished and/or goals met. In addition, in 2016 when Evergreen Solutions surveyed other workforce boards within the state to quantify the incentives they provided to staff, they reported “WorkNet currently offers employees in the Recruiter and Lead Business Services Recruiter additional financial incentives based on successful performance. Evergreen included questions relating to this incentive pay in its survey process. Of those peers that responded to these questions, none provided an incentive for their recruiter positions in the form of a one-time incentive. However, these same peers acknowledged that these employees’ placement rates are a major factor in the performance review process, which determines the size and eligibility of employee raises.”

Finally, questions have been raised in the last few months as to whether the goals included in these incentive plans resulted in practices that are now being questioned as to their allowability and appropriateness.

## **Discussion**

The CareerSource Tampa Bay and CareerSource Pinellas Committees and Boards should discuss and determine if these monthly incentives for the Account Executive and Recruiter positions within the Business Services Department are justifiable, relevant, reasonable, defensible, and necessary to accomplish the vision of the Workforce Innovation Act – to “improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet the skill requirements of businesses and enhance the productivity and competitiveness of the Nation.”

If the Board determines that these monthly incentives for the Account Executive and Recruiter positions within the Business Services Department should continue, then further discussion will be needed on at least the following topics:

- How the incentive plan will be structured going forward (i.e., timing of incentives, difficulty vs. simplicity of plan, etc.),
- The types of goals/objectives that should be established to ensure unintended results are not achieved (what you measure is what you’ll get),
- The balance needed in the actual measurable goals that will motivate but not discourage staff,
- The percentage of total salary or amount that should be available to be earned as incentives, and
- Whether or not there will be a cap on the amount of incentive available to be earned.

If the Board determines that these monthly incentives for the Account Executive and Recruiter positions within the Business Services Department should not continue, then further discussion will be needed on at least the following topics:

- Will these incentives be ended immediately or phased out over a period of time,
- What will take the place of these incentives (such as a salary increase, non-monetary incentives, etc.), if anything, and
- Will this put CareerSource Tampa Bay and CareerSource Pinellas at a disadvantage in future recruiting to fill any vacancies in these positions?

# Attachment I

# CSTB-Business Services

## Recruiter

### Staff Performance Incentive Grid PY 2017-2018

Incentives will be based on a tier system for the following performance measures:

Monthly Staff Incentive Summary	Maximum Monthly	Maximum Annual
<p><b>1. Direct Placements</b>  <i>Credit will only count if the placement is a direct result of a staff referral to a job order in EFM. Placement must be determined eligible, employment verification confirmed (person worked at least one day), and EFM documentation (activity code) completed <u>before</u> placement can be taken. Staff referral made to the job order after start date will not count. Regarding on-site recruiting events, staff referral must be made prior to or up to the date of the event in order to receive credit. (Referring from an on-site recruitment event sign-in sheet is strictly prohibited).</i></p> <p><i>(Excludes Job Development Placements, any and all employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	600	7200
<p><b>2. Job Development Placements &amp; Obtains</b>  <b>Job Development:</b> <i>Credit will only count if the placement is a direct result of a staff referral to a job order in EFM. Proper documentation of 114 activity and/or general case note, 123 activity with corresponding case note, staff referral, and placement EFM documentation (activity code) must be processed <u>before</u> placement can be taken. (Refer to JD Desk Guide/Process in its entirety to receive proper credit).</i>  <b>Obtains:</b> <i>A staff member may claim an Obtain if you verified employment directly with the job seeker, properly case noted the interaction in EFM, and submitted the Employment Verification (EV) form to "Return to Work." Processing Team will determine eligibility, complete EFM documentation (880 activity code), and case note. Processing Team will send an approval or denial email to staff. Audit team will confirm with Processing Team the approval email and EFM 880 activity code with an employment verification case note in order to receive credit.</i></p> <p><i>(Excludes any and all employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	300	3600
<p><b>3. PWE/OJT Placements</b>  <i>Any placement resulting from direct sourcing of a candidate that is deemed eligible for PWE/OJT programs and hired by an employer with a signed OJT/PWE agreement. Credit will only count if the placement is a direct result of a staff referral to an OJT/PWE job order prior to the start date. Placement must be determined eligible, employment verification confirmed (person worked at least one day), and EFM documentation (activity code) completed <u>before</u> placement can be taken. Staff referral made to the job order after start date will not count. Regarding on-site recruiting events, staff referral must be made prior to or up to the date of the event in order to receive credit. (Referring from an on-site recruitment event sign-in sheet is strictly prohibited).</i></p> <p><i>(Excludes Job Development Placements, any and all employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	200	2400
<p><b>4. Specialty Placements</b>  <i>Any placement resulting from direct sourcing of a candidate that is deemed eligible for the following programs: (1) WIOA Training Completers, (2) WIOA ABC Application Enrollments, (3) CPC/Science Center Completers, (4) Tech Hire ABC Enrollments &amp; (5) Tech Hire Training Completers.</i></p> <p><i>Credit will only count if the placement is a direct result of a staff referral to a job order in EFM. Placement must be determined eligible, employment verification confirmed (person worked at least one day), and EFM documentation (activity code) completed <u>before</u> placement can be taken. Staff referral made to the job order after start date will not count. Regarding on-site recruiting events, staff referral must be made prior to or up to the date of the event in order to receive credit. (Referring from an on-site recruitment event sign-in sheet is strictly prohibited). For WIOA ABC and Tech Hire Enrollments, application must be submitted prior to candidate's start date and approved by Processing Team in order to receive credit.</i></p> <p><i>(Excludes Job Development Placements, any and all employer hire lists, on-site hire lists, OJT/PWE hire lists submitted by employers, and obtains. Obtains, if applicable, should be listed for credit under Job Developments and Obtains).</i></p>	300	3600
<b>TOTALS</b>	<b>\$1,400</b>	<b>\$16,800</b>

# CSTB-Business Services

## Account Executive

### Staff Performance Incentive Grid PY 2017-2018

Incentives will be based on a tier system for the following performance measures:

Monthly Staff Incentive Summary	Maximum Monthly	Maximum Annual
<p><b>1. Direct Placements</b>  <i>Credit will only count if the placement is a direct result of a staff referral to a job order in EFM. Placement must be determined eligible, employment verification confirmed (person worked at least one day), and EFM documentation (activity code) completed <u>before</u> placement can be taken. Staff referral made to the job order after start date will not count. Regarding on-site recruiting events, staff referral must be made prior to or up to the date of the event in order to receive credit. (Referring from an on-site recruitment event sign-in sheet is strictly prohibited).</i></p> <p><i>(Excludes Job Development Placements, any and all employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	500	6000
<p><b>2. New OJT/PWE Contract with Job Order</b>  <i>Signed contract must be from new employers (no previous signed contract) or current employers who have been inactive in OJT/PWE participation for the last 12 months. In order to receive credit, the signed contract must be accompanied with a job order submitted directly by staff and posted to EFM.</i></p>	250	3000
<p><b>3. Job Order Fulfillment (within 30 days)</b>  <i>Job Order must be "max-placed" within 30 calendar days from the date created in EFM as a direct result of a staff referral and direct placement. Only exception given will be when the staff referral and employer hiring decision has been made within the 30 calendar days, however, the official start date is beyond the 30 calendar days. In such case, email documentation will need to be submitted to Audit Team for validation and approval in order to receive credit.</i></p> <p><i>(Excludes Job Development Placements, Obtains, any and all previous or existing employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	250	3000
<p><b>4. New Employer Hire Lists</b>  <i>Employer Hire list must be submitted directly by staff from a new employer (no previous hire list submitted in last 12 months) to Centralized. In order to receive credit, existing hire lists must be maintained on an on-going basis and submitted along with any new hire list received.</i></p> <p><i>(Excludes any and all previous or existing employer hire lists, on-site hire lists, and OJT/PWE hire lists submitted by employers).</i></p>	200	2400
<p><b>5. Tech-Hire Placements</b>  <i>Any placement resulting from direct sourcing of a candidate that is deemed eligible for the following programs: (1) Tech Hire ABC Enrollments &amp; (2) Tech Hire Training Completers.</i></p> <p><i>Credit will only count if the placement is a direct result of a staff referral to a job order in EFM. Placement must be determined eligible, employment verification confirmed (person worked at least one day), and EFM documentation (activity code) completed <u>before</u> placement can be taken. Staff referral made to the job order after start date will not count. Regarding on-site recruiting events, staff referral must be made prior to or up to the date of the event in order to receive credit. (Referring from an on-site recruitment event sign-in sheet is strictly prohibited). For Tech Hire ABC Enrollments, Tech Hire application must be scanned and submitted by staff prior to candidate's start date and approved by Processing Team in order to receive credit.</i></p> <p><i>(Excludes Job Development Placements, any and all employer hire lists, on-site hire lists, OJT/PWE hire lists submitted by employers, and obtains. Obtains, if applicable, should be listed for credit under Job Developments and Obtains).</i></p>	200	2400
<b>TOTALS</b>	<b>\$1,400</b>	<b>\$16,800</b>



## CSTB & CSPIN - Business Services PY 2017-2018 Staff Performance Incentive Grid Summary

Each position entails job duties and responsibilities which must be met at a minimum if we are to succeed as a department and organization. For Recruiters and Account Executives that perform their job functions at levels exceeding minimum expectations, they have the ability to receive monthly incentives.

Incentive Performance measures have been selected from your job functions that are important to our organization's overall continued success. Meeting the minimum threshold under each performance measure will deem you eligible to begin receiving incentive payments. The incentive payments will be based on individually meeting and exceeding minimum thresholds for all incentivized performance measures, in addition to meeting minimum thresholds for non-incentivized performance measures. Performance incentives are inclusive of all CSTB & CSPIN offices and are subject to change at any time.

The following criteria, limitations and restrictions will be used when calculating incentives on a monthly, quarterly and annual basis:

### General Guidelines

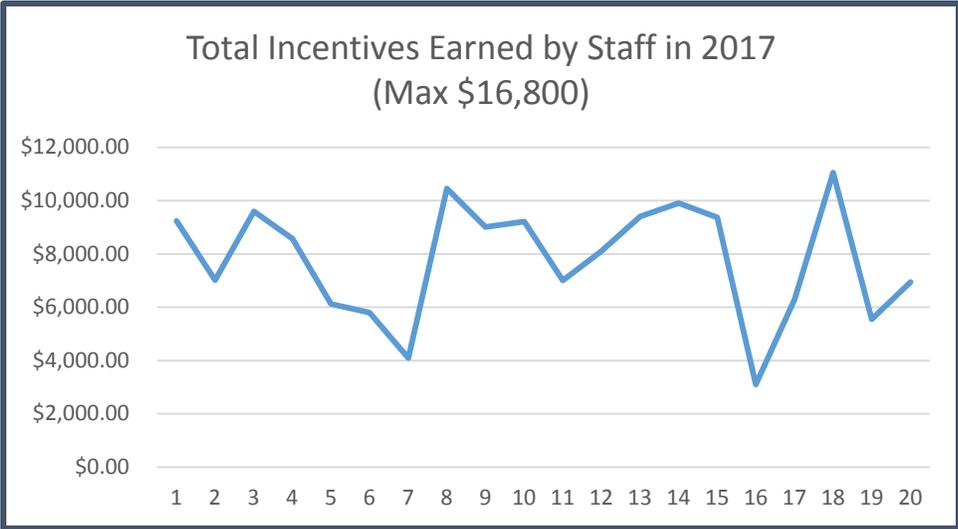
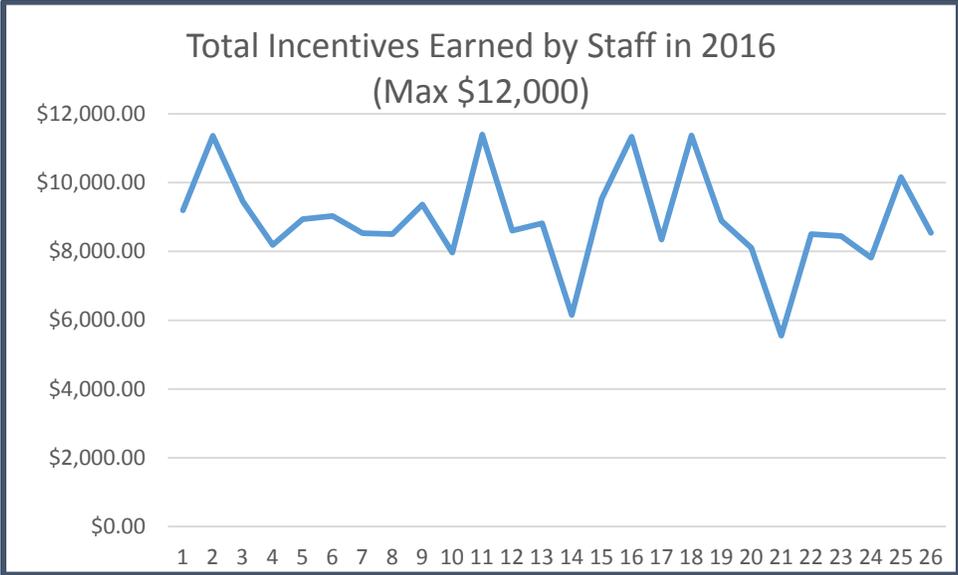
- The Monthly Maximum Incentive Amount is \$1,400 (*\$16,800 yearly maximum*) effective August 1, 2017 to June 30, 2018 and is to be paid on the last pay period of the subsequent month.
- Performance measures for Performance Incentives are defined on the 2017-2018 Staff Performance Incentive Grid.
- After one full month of employment as a recruiter, new hires will be eligible to participate and earn Performance Incentives beginning at month two (2) of employment.
- No dollar amount or metric numbers will carry forward at the end of each quarter. Partial monthly payouts, payout advances, or recouping are not available.
- Staff must meet the minimum threshold under each category in order to become eligible for incentives. Your performance above the minimum threshold will determine which incentive tier amount you meet. Recouping of missed incentives will not be available.
- Staff are expected to meet minimum expectations of all performance measures to include both non-incentivized and incentivized categories. Staff who continually fail to meet minimum performance thresholds for three (3) consecutive months will be subject to disciplinary action. The monthly performance reports will serve as official documentation of incidents as outlined in the WorkNet Pinellas Employee Handbook.
- **For compliance purposes of all state and federal funds, all submitted information on monthly forms will be internally and externally audited. Incentives are not contractual wages. If a staff member, including the Account Executive who is responsible for reviewing and validating individual staff performance, is deemed to have provided any false, misleading, or altered information on the monthly form, it will be considered Fraud resulting in immediate disciplinary action and/or termination.**

### Report Submission Guidelines

- Monthly report submissions, in excel format, are due by the 5<sup>th</sup> to Business Services Reports for initial review by the Audit Team. Upon final review by management, reports will be returned to staff for required signatures and should be sent, in PDF format, by the end of the month to Business Services Reports.
- Do not modify the report template from its original format. Modified forms will be rejected and staff will be reprimanded and required to re-submit.
- Complete the report in its entirety by providing all data requested under each category as to validate your performance. Failure to do so will result in staff receiving no credit for those items that the Audit Team cannot validate. Incomplete or late reports submissions will not be processed and will be ineligible for incentives. If you are in doubt about anything on the form, please direct all questions to your supervisor for clarity prior to submittal.

# Attachment II

# Total Incentives Earned and Paid to Business Services Recruiters and Account Executives



Staff in a Recruiter and/or Account Executive position for a partial year were not included in the above graphs as their earnings would not be representative for comparison purposes.



## Action / Discussion Item 3

### Compensation and Goals for Interim Directors

#### **Background**

With the administrative suspension of the CareerSource Pinellas and CareerSource Tampa Bay President and CEO on February 14, 2018 and February 2, 2018 respectively, the Chairs of each Board appointed a current staff Director to serve as Interim Director to oversee the day to day operations of the organization and ensure a continuity of service delivery. As the length of this assignment was undetermined, no adjustment in compensation was authorized at the time of the appointment.

The roles and responsibilities of the Interim Director position are significantly more comprehensive and wide-ranging than the roles and responsibilities of the positions these individuals had before their appointment as Interim. See position descriptions under Attachment I. Juditte Dorcy was the Director of the Youth Department (Director of Programs) overseeing the delivery of services to youth and Jennifer Brackney was a Director of Projects responsible for various special projects such as grant writing and drafting the organization's five year plan.

Goals were established previously by the Compensation Committee and then full CareerSource Pinellas Board for the President and CEO – those annual goals are shown in Attachment II. In this current situation, these goals may or may not be reasonable and applicable for the two Interim Directors. The goals set for the Interim Directors for their previous position's responsibilities are not applicable to this new role as Interim.

The salary ranges in the compensation plan for these two Director's and President and CEO positions follow:

Position Title	Minimum Salary	Mid Salary	Max Salary
Director of Projects	\$ 74,000.00	\$ 96,200.00	\$ 118,400.00
Director of Programs	\$ 79,900.00	\$ 103,900.00	\$ 127,900.00
President and CEO	\$ 140,000.00	\$ 182,000.00	\$ 224,000.00

Both the CareerSource Pinellas and CareerSource Tampa Bay Boards have, in a publicly noticed meetings, voted to terminate the President and CEO without cause effective with the latest date of a vote by the Board on March 21, 2018.

#### **Discussion**

The CareerSource Tampa Bay and CareerSource Pinellas Committees and Boards should discuss and determine if it is justifiable, reasonable, and defensible to adjust the compensation of both Interim Directors, Jennifer Brackney and Juditte Dorcy and, if so, the method of that

increase (salary increase, monthly bonus tied to goals accomplished, end of interim assignment bonus tied to accomplishments, etc.) and the amount of the adjustment.

In addition, regardless of the decision on compensation, measureable and meaningful goals should be established for the Interim Directors and a process of evaluation of accomplishments should be designed and implemented.

**Attachments**

Attachment I – Position descriptions

Attachment II – President and CEO annual goals

Attachment III – Current compensation

Attachment IV – Accomplishments to date

# Attachment I

## **WorkNet Pinellas Classification Description**

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**Classification Title: Programs Director**

**Pay Grade: 31**

**FLSA Status: Exempt**

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### **Purpose**

This position focuses on the development and operations of workforce programs overseen by WorkNet Pinellas Inc. These programs include but may not be limited to the Welfare Transition, SNAP, Workforce Innovation and Opportunity Act, and One Stop operations. It is responsible for meeting specific program goals with customer satisfaction and job placement being the ultimate outcome for program participants.

### **Job Duties and Responsibilities**

#### **Essential Functions:**

- Plan and direct development of One Stop operations
- Coordinate and facilitate One Stop activities related to service delivery
- Administrative responsibilities for the operation of designated programs to include WT, WIOA and Core
- Manage job seeker expectations
- Monitor and evaluate the performance of the Programs staff and structure; team plan for continual improvement of the efficiency and effectiveness of the group and provide individuals with professional and personal growth
- Ensure employees have knowledge of and comply with departmental goals, objectives, budget, established performance standards, policies and procedures
- Ensure all program goals and objectives are met
- Works with other Directors to ensure customer flow is being addressed and service delivery is seamless
- Respond to and resolve customer complaints
- Maintain effective contacts with other agencies, public officials, community groups and business partners
- Develop short- and long-term plans and budgets for the Programs division and its activities, monitor progress, assure adherence and evaluate performance

- Develop and/or enhance, implement and enforce internal control policies, guidance and procedures for Programs activities of the organization that will improve the overall operation and effectiveness of the operation
- Participate in the development of the organization's plans, programs, policies and long-range goals as a strategic partner
- Evaluate and advise on the impact of long-range planning, introduction of new programs/strategies and regulatory action

**Additional Duties:**

Perform other duties as assigned

**Minimum Education and Training**

- Bachelor's Degree in Business or Public Administration or a related field from an accredited college or university
- Five (5) years experience in related employment and training services including management level experience in developing and managing programs or equivalent combination of education, training and/or experience

**Job Specifications**

- Knowledge of region's community based organizations and employer organizations
- Proficient in the use of computers as well as word processing and spreadsheet software such as Excel and Word
- Ability to access and utilize WorkNet databases and the internet
- Knowledge of public administration principles and practices
- Knowledge and understanding of Federal and State guidelines related to the Welfare Transition, WIOA and Core programs
- Ability to apply independent judgment and discretion based on knowledge of WorkNet's functional and structural organization
- Ability to plan, direct, supervise, coordinate, organize and inspect specialized projects, programs and activities
- Ability to make decisions in accordance with Federal Guidelines and practices
- Understand the basics of program operation
- Ability to plan, direct, supervise, coordinate, organize the work of professional and clerical employees

- Ability to analyze, understand and achieve designated goals
- Ability to establish and maintain effective working relationships with other federal, state and county operational units
- Knowledge of business and management principles involved in strategic planning, resource allocation, leadership techniques, and coordination of people and resources
- Ability to use critical thinking to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems
- Ability to judge and make appropriate decisions when considering the relative costs and benefits of potential actions
- Ability to communicate effectively in writing and verbally and to present and communicate ideas and concepts in public and private
- Ability to monitor and control resources
- Ability to establish and maintain effective and constructive working relationships with others, both internal and external to the organization

## **WorkNet Pinellas Classification Description**

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**Classification Title: Project Director**  
**FLSA Status: Exempt**

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### Purpose

This position is responsible analytical work of writing, maintaining, reviewing and coordinating federal and state grant programs and contract administration. Employees in this class exercise independent judgment evaluating information, initiating action and oversight of assigned projects. Under general direction, the employee facilitates development, review and editing of grant proposals; conducts basic research for potential funding sources; interacts with administration and outside agencies in developing funding sources for WorkNet Pinellas, Inc.

Work requires coordination with fiscal and operational staff within WorkNet as well as other agencies to develop and maintain reports on the status of assigned special projects. Work is performed under supervision of the Executive Director, with considerable independent judgment and is reviewed through observation of results obtained, conferences and periodic reports or evaluations.

### Job Duties and Responsibilities

#### Essential Functions:

- Prepare reports for management, federal and state officials related to various programs/projects funded.
- Insure program/project compliance with local, state, and federal requirements.
- Assist with coordination of on-going marketing of workforce development programs.
- Coordinate the annual Business and Education Summit.
- Assist with the coordination of various Business seminars & roundtables.
- Performs related work as assigned.

### Minimum Education and Training

- Bachelor's Degree in Business or Public Administration or a related field from an accredited college or university
- Five (5) years experience in related employment and training services including management level experience in developing and managing programs or equivalent combination of education, training and/or experience

## Job Specifications

- Knowledge of region's community based organizations and employer organizations
- Proficient in the use of computers as well as word processing and spreadsheet software such as Excel and Word
- Ability to access and utilize WorkNet databases and the internet
- Knowledge of public administration principles and practices
- Knowledge and understanding of Federal and State guidelines related to the Welfare Transition, WIOA and Core programs
- Ability to apply independent judgment and discretion based on knowledge of WorkNet's functional and structural organization
- Ability to plan, direct, supervise, coordinate, organize and inspect specialized projects, programs and activities
- Ability to make decisions in accordance with Federal Guidelines and practices
- Understand the basics of program operation
- Ability to plan, direct, supervise, coordinate, organize the work of professional and clerical employees
- Ability to analyze, understand and achieve designated goals
- Ability to establish and maintain effective working relationships with other federal, state and county operational units
- Knowledge of business and management principles involved in strategic planning, resource allocation, leadership techniques, and coordination of people and resources
- Ability to use critical thinking to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems
- Ability to judge and make appropriate decisions when considering the relative costs and benefits of potential actions
- Ability to communicate effectively in writing and verbally and to present and communicate ideas and concepts in public and private
- Ability to monitor and control resources
- Ability to establish and maintain effective and constructive working relationships with others, both internal and external to the organization

## **WorkNet Pinellas Classification Description**

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**Classification Title: CEO/President**  
**Department: Indirect**  
**Pay Grade: 38**  
**FLSA Status: Exempt**

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### **Purpose**

This is the chief administrative official for WorkNet Pinellas, Inc. The President and CEO is directly responsible to the board of directors for the administration and operation of various workforce programs and compliance with all federal, state, and local laws, policies and strategic plans. The President and CEO is also responsible to the board of directors for the preparation and modifications to the annual budget, and for control of expenditures throughout the budget year. The President and CEO serves as a full time employee at the pleasure of the board of directors. Duties require the exercise of significant judgment where consequence of error can be significant. The President and CEO is responsible for promoting Workforce Programs in Pinellas County to create high quality employment opportunities for job seekers and secure and maintain a skilled employee base for employers.

An employee in this class will serve as a contact point for the workforce development agencies to pursue state and federal funding and coordinate short and long term strategies to meet the objectives of the WorkNet Pinellas, Inc. Board's and County's strategic plan. This position will spend significant time developing community and professional relationships with workforce representatives, boards, committees, legislative delegations, and businesses. Work is performed with considerable independence within the scope of assigned goals and objectives.

The position reports to the WorkNet Pinellas, Inc. Board of Directors. Work is reviewed through conferences outlining desired objectives, observations of results achieved, periodic reports and performance standards established by the Board or Directors of WorkNet Pinellas, Inc.

### **Job Duties and Responsibilities**

#### **Essential Functions:**

- Coordinates with local, state and federal workforce agencies, local municipalities, community development agencies, businesses and other groups to identify workforce development projects to enhance and increase economic development in Pinellas County
- Administers and carries out the directives and policies issued by the board of directors
- Selects and employs personnel to fill all vacancies and terminates employment for cause
- Supervises Chief Financial and Chief Operating Officers
- Coordinates/facilitates long and short term studies, prepares reports and determines regulatory conformance of economic development and workforce proposals

- Confers with governmental officials to effect changes in local and state policies or ordinances to encourage effective job development, incentives and partnerships
- Ensures preparation and required approvals of annual budgets and operational plans
- Coordinates activities such as research, analysis, and evaluation of technical information to determine feasibility and economic impact of proposed job expansions and development
- Coordinates with countywide and local economic development agencies and supports their business recruitment and retention initiatives
- Identifies and applies for appropriate State, Federal public/private funding for economic and workforce development projects
- Facilitates cooperation between local service agencies, educators and businesses to promote workforce programs and economic development for mutual benefit
- Promotes cooperation among local agencies to reduce overlap and duplication of efforts and share resources to enhance workforce development efforts
- Presents reports to the WorkNet Pinellas, Inc. Board, Florida Workforce Board, Board of County Commissioners, County Administration, and governmental agencies on progress of WorkNet projects; recommends changes to the WorkNet master plan

**Additional Duties:**

Perform other duties as assigned

**Minimum Education and Training**

- Master's Degree in Business Administration, Public Administration, Human Resources or closely related field from an accredited college or university
- Five (5) years of professional experience in a high level leadership capacity with workforce or closely related area with large governmental or private sector organizations; or an equivalent combination of education, training and/or experience
- Certified Public Accountant Designation or Juris Doctor preferred

**Job Specifications**

- Knowledge of federal and state workforce legislation and grant funding
- Knowledge of recent developments, current literature and sources of information regarding workforce development, economic development, employment training, job development programs and adult education, training and services

- Knowledge of contract management and negotiations
- Knowledge of economics and finance as it applies to economic development
- Knowledge of research techniques and labor market statistics
- Knowledge of public administration with particular reference to county and municipal administration and budgeting
- Skill at negotiating and managing multiple priorities and interests with diplomacy and tact
- Ability to communicate effectively, both orally and in writing
- Ability to analyze facts and exercise sound judgment in decision-making
- Ability to effectively manage a large staff and delegate responsibility for optimum results
- Ability to work with Boards, Committees, and public and private organizations
- Ability to determine strategy and long range goals for the organization
- Ability to determine allocation of budget to divisions and departments

## Attachment II

**President & CEO GOAL ATTAINMENT**

<b>GOAL</b>	<b>Impact/ Weight</b>	<b>Evaluation Rating Measure Example</b>	<b>Board Member Rating</b>	<b>Weight x Final rating</b>	<b>Comments</b>
Assure administrative and financial compliance of the organization and individual programs.	9	3 – Annual independent auditor delivered an unqualified opinion on financial statements, internal controls, and compliance with the final report having no findings, -0- disallowed costs, -0- questioned costs, no material weaknesses or significant deficiencies, no issues of non-compliance identified and no adjustments to financial statements. Performance demonstrated by Audit committee's review of the annual audit.			
Assure adequate control of all funds, including developing sound financial practices, to ensure that overall financial performance remains within Board approved budgetary parameters and within minimum and maximum limitations established in applicable laws and regulations.	8	3 –The organization stayed within the latest budgetary parameters established by Board. Performance demonstrated by Finance Committee's review of quarterly budget reports.			
Maintain and utilize a working knowledge of significant developments and trends in workforce development to ensure effective and appropriate positioning of the organization for future relevancy and success.	8	3 – Always demonstrates an outstanding working knowledge of all developments and trends in workforce development, at the local, state and national level, and uses this knowledge to appropriately and effectively position the organization for relevancy and success in every circumstance. Performance is demonstrated by ability to quickly respond to questions raised during discussions at board meetings as well as developing and implementing critical strategies based on that knowledge.			

GOAL	Impact/ Weight	Evaluation Rating Measure Example	Board Member Rating	Weight x Final rating	Comments
Promote accountability and transparency by ensuring that this organization's employment and training programs are evidence based and data driven, and accountable to the Pinellas Board of County Commissioners, the local workforce Board, CareerSource Florida, DEO, local employers, job seekers, and the general public.	8	3 – Always promotes accountability and transparency by ensuring that this organization's employment and training programs are evidence based, data driven, and accountable. Performance demonstrated by frequent data driven and evidence based reports that are made available and/or delivered that are clear, accurate and written for the intended audience.			
Strategically align workforce development programs to ensure that employment and training services provided by the core programs identified in the WIOA (WIA, Wagner-Peyser, Vocational rehabilitation and Adult Education) are coordinated and complementary so that job seekers acquire skills and credentials that meet employers' needs.	8	3 – Always aligns core workforce development programs resulting in job seekers acquiring skills and credentials that meet employers' needs. Performance is demonstrated by exceeding all annual goals for the number of job seekers that complete pre-vocational, OJT, EWT, and vocational training with skills and credentials that meet employers' needs.			

Improve services to employers and continue to promote work based training to ensure that our services are employer driven and contribute to the economic growth and business expansion in our community.	8	3 – Always improves services to employers and continues to promote work based training. Performance is demonstrated by exceeding all annual goals for the number of job seekers that are enrolled into OJT and EWT.			
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GOAL	Impact/ Weight	Evaluation Rating Measure Example	Board Member Rating	Weight x Final rating	Comments
Provide access to high quality training to help job seekers acquire industry recognized credentials for in demand jobs.	8	3 – Always provides access to high quality training. Performance is demonstrated by periodic reports that show that 100% of pre-vocational and vocational training enrollments are in occupations that allow job seekers to acquire industry recognized credentials and lead to jobs in demand.			
Place special emphasis on the development, implementation and/or expansion of strategies for meeting the needs of local employers, workers and job seekers through sector partnerships related to in demand industry sectors and occupations.	8	3 – Always places special emphasis on the development, implementation and/or expansion of strategies for meeting the needs of local employers, workers and job seekers through sector partnerships. Performance is demonstrated by convening and listening to leaders in the health care; advanced manufacturing; Business, Financial, & Data Services; and IT industries and industry associations and presenting a plan of action to the Board that responds to these targeted industry recommendations.			
	65				

Rating Scale Legend	Overall Level of Performance	Range of Overall Points
3	Performance is <b>above standards</b> for the position	201-300
2	Performance <b>meets the standards</b> for the position	101-200
1	Performance is <b>below standards</b> for the position	0-100

# Attachment III

## Current compensation

Name	Base salary	Bonus*	401K – 5%	Annual one-time performance incentive in lieu of merit or COL increase. Based on performance evaluation – max 5%**	Total	Benefit stipend to purchase benefits from cafeteria plan – 28%***
Brackney, Jennifer, Interim Director Pinellas	\$85,000	N/A – none scheduled or potential identified.	\$4,250	Due in December 2018	\$89,250	\$23,800
Dorcy, Juditte, Interim Director Tampa Bay	\$90,000	N/A – none scheduled or potential identified.	\$4,500	Due in December 2018	\$94,500	\$25,200

\* Bonus is very unusual. In last several years record only shows 1 provided for a staff who assumed the duties of his supervisor while she was on maternity leave. This was delivered after the supervisor returned for the exceptional job done during the 12 weeks. The amount was \$3000.00.

Last 3 years, 2 staff were provided an increase in salary on a temporary basis for additional responsibilities assigned for limited period of time.

\*\* Availability and maximum amount to be awarded are considered each year by Compensation Committee and then Executive Committee and full Board.

\*\*\* Depending on which benefits are elected and the cost, any remaining stipend rolls through to gross wages.

# Attachment IV

## **Accomplishments to Date by Juditte Dorcy Report to the Compensation Committee**

To promote accountability and transparency of this organization's employment and training programs to the Hillsborough Board of County Commissioners, the community, staff and local business leadership, I have

- Met weekly with the Hillsborough BOCC liaison and once with the Assistant County Administrator to discuss issues and progress.
- Attended the Hillsborough BOCC meeting to be available to answer any questions raised by the Commissioners on the approval of the Workforce plan.
- Attended the Hillsborough Tampa EDC board meeting to answer any questions or concerns posed by other members and continue our part in building relationships with new business development and retention of employers in Hillsborough County.
- Worked with the Hillsborough BOCC to identify and initiate recruitment of new Board members from large county employers to fill the current vacancies on the CareerSource Tampa Bay Board.
- Entered into a short term contract with a public relations firm to assist staff in developing targeted messages to employers, staff and partners. Media training has been scheduled for 15 management staff. As a result of the assistance gained from this public relations firm, we feel we have managed to stop 4 negative stories from printing.
- Developed and I am in the process of implementing an Ethics Hotline which will give staff the opportunity to report/share any actual or perceived violations of policies, including the capability to anonymously report, to an independent 3<sup>rd</sup> party. We are planning to launch this Hotline in early May.
- Visited every One-Stop Center in Hillsborough on multiple occasions to make myself available to staff to discuss any issues with which they have concerns.
- Spearheaded efforts to address rodent and pest problem at the Tampa Center (State owned building) by demanding action by DEO. Daily and weekly updates are being provided to staff and DEO as warranted.
- Worked to provide responses in a timely manner to media record requests.

To assure administrative and financial compliance of the organization and individual programs, I have

- Secured the assistance of DEO to provide training to our front line staff on key program policies. Schedule is being developed for immediate deployment in early May.
- Scheduled, coordinated and managed the DEO Financial monitoring visit and USDOL's abbreviated review for Hillsborough County. Both entities will return the week of April 16<sup>th</sup> to continue their reviews.
- Worked with HR to develop and implement a family member disclosure statement for all new hires. We plan to send this out to current staff within the week.

To assure adequate control of all funds and to ensure that overall financial performance remains within Board approved budgetary parameters and within minimum and maximum

limitations established in applicable laws and regulations I have met with the Finance Director one-on-one to review expenditures and met with HR to discuss the appropriate coding of payroll by staff person. More attention is planned on payroll coding as we move forward.

I am working daily to strategically align our workforce development programs to ensure that employment and training services provided by the core programs are coordinated and complementary so that job seekers acquire skills and credentials that meet employers' needs. To date, I have

- Promoted a current staff to Director of Programs to manage the WIOA adult, WIOA dislocated worker, WIOA youth program, Welfare Transition program, SNAP (food stamp) program, and special grants received.)
- Expanded another current Director's responsibilities to include management and oversight of the Wagner-Peyser programs (resource rooms)
- Met with each Director to align the services under our On the Job training (OJT) program, Employed Worker Training (EWT) Program, and Paid Work Experience program (PWE).
- Secured annual training vendor agreements with approved training providers.

To continue to improve services to employers and promote work based training to ensure that our services are employer driven and contribute to the economic growth and business expansion in our community, I have

- Worked in partnership with Jennifer Brackney to reorganize the Business Services Department. I have also directed Business Services staff to continue to communicate with our current employers, follow-up on their requests for services, answer any questions employers may have about our current situation and emphasize to employers that we are moving forward. This has resulted in 3296 new job vacancies posted since 2/2/18 in Hillsborough County (2952 were employer entered and 344 staff entered) with 104 new employers registered for services. Three of those new employers include Disney, Southwest Airlines and Burger 21.
- Convinced Hillsborough School District to continue their teacher and transportation recruitment partnership with CareerSource Tampa Bay. This allows us to assist in recruitment of 1900 individuals. Teacher recruitment started in January and continues through August for fall start. Hillsborough School District is the 8th largest school district and the largest employer in Hillsborough County.
- Met with the Board Chair and Citi to encourage them to continue the relationship with CareerSource Tampa Bay. The Chair and I were able to begin communication strategies with Citi to keep them informed on the status of their grant to us. We are currently at 36 of the planned 150 enrollments for the Pathways to Progress grant that funds trainings in Welding, Soldering, Building Trades/Construction, Mechatronics Robotics, Microsoft Training and Hospitality. I have assigned additional current staff to manage this important grant to meet all deliverables. We were successful in getting Citi to agree to continue the partnership.

To place special emphasis on the development, implementation and/or expansion of strategies for meeting the needs of local employers, workers and job seekers through sector partnerships related to in demand industry sectors and occupations, I have

- Directed the completion of a grant application for Apprenticeship funding in Hillsborough County, partnering with HCC and a local Migrant and Seasonal Farmworker agency.
- Expanded responsibilities of two key staff to include business outreach and partnership development in the community.
- Authorized the letting of a Business Association procurement action to reach out to chambers and other associations and encourage continued partnership with CareerSource Tampa Bay.
- Coordinated the two Career Fairs held in February and March which had 49 employers in attendance and 239 job seekers. Also worked with Pinellas on the Professional Mixer and Internship Fair which were well received by both job seekers and employers. Candidates for the Professional Mixer are currently in the interview process by New Horizons, Geographic Solutions, Burger 21 and Greenway Health and follow up will continue to provide end results.

Attended the National Association of Workforce Boards annual Conference in Washing DC over the weekend to guarantee that I maintain and utilize a working knowledge of significant developments and trends in workforce development to ensure effective and appropriate positioning of the organization for future relevancy and success.

To provide access to high quality training to help job seekers acquire industry recognized credentials for in demand jobs, I have

- Continued to move forward to outreach for job seekers to enroll in the short-term career ready training programs at the Career Prep Center and employers to get involved in hiring the training graduates.
- New employers working with us on CPC programs include
  - International Paper is one of the world's leading producers of fiber-based packaging, pulp and paper. International Paper visited the CPC on March 14, 2018. Steven Ruiz from our Mechatronics Class is in the final stages of interviewing with this company and is expected to be hired soon.
  - Monsalve Tool & Design (MTD), is the manufacturing division of McManis & Monsalve Associates. Last week I forwarded resumes from our Mechatronics graduating class and they are very interested in these students.
  - Coremark operates a logistics and distribution Center near the Fairgrounds and is interested in some of our CPC Graduates. We sent training graduates to a Recruitment Event that they hosted last Thursday. We are expecting that 1 student will be hired in the next seven days.
  - Hepaco visited the CPC on March 22, 2018. Hepaco is a high quality environmental service provider and they have evolved into one of the market leaders providing solutions to solve the environmental challenges of our

- clients. Hepaco met with our Mechatronics students and conducted an information session. Two of the students were interested, and we're anticipating that they may be hired soon.
- Amalgamated Steel is a steel fabricator in the Palm River-Clair Mel area. I had contacted the HR Manager several times in the last 4 weeks about our services, and they finally responded last week. They have invited us to tour their facility later this week and are very interested in hiring Welder's Helpers from our Welding class.
  - Plastipak provides packaging solutions and has a plant in Plant City. I recently contacted them and they are very interested in the CPC Students. We hope to tour their facility this month.
  - PTR Baler & Compactor manufactures Vertical Balers, Compactors, Tippers and Biogreen Composters in Philadelphia PA. PTR also provides parts, installation and emergency repair service for waste and recycling equipment. They have a plant in Plant City where they hire Welder's Helpers. They recently took a tour of the CPC and were impressed with the knowledge of the Welding students. We are planning to work with them in the near future.

April 9, 2018

Mr. Mike Mikurak, Chairman  
Compensation Committee  
13805 58<sup>th</sup> Street North, Suite 2.140  
Clearwater, Florida 33760

Dear Mr. Mikurak,

As you know, Mr. Aundre Green asked me to serve as Director, Interim on Thursday, February 1, 2018 as Mr. Peachey, President & CEO was placed on paid administrative leave. As part of this appointment, he asked that I oversee the operations of CareerSource Pinellas.

During the past eight weeks, most of my activities have been reactive. I have not had the opportunity to demonstrate many of my proactive accomplishments. I have received 8,257 email and responded to over 2,500; received four anonymous letters and read/filed 105 articles; received a whistleblower letter and subpoena; received 74 records requests from the Tampa Bay Times and 17 requests from DEO, DOL, OIG and Marion Hale; held 12 Board, Executive or special meetings; maintained Programs, managed Business Services and the Science Center; dealt with numerous Fiscal and HR issues; and worked to align staffing duties with payroll.

In addition, I have met with staff and, to the best of my ability, answered questions regarding the transition. I've listened to staff concerns, comforted staff that cried in my office, addressed concerns about past practices, and implemented several immediate changes within Business Services to better align with DEO/DOL expectations.

Some of my proactive accomplishments have been in the areas of HR and Finance. I have attempted to better understand the staffing of the organization and recommended changes to have a direct line of authority for staff and to better align staff activities with payroll. I have also attempted to promote greater transparency in both Finance and HR. Both of these areas were supervised directly and closely monitored by Ed Peachey and there was not a lot of transparency. In addition, I have maintained many of my previous duties, including writing grants, supporting the Science Center and submitting an approved Two-Year Modification to the Local Workforce Plan on behalf of both CareerSource Pinellas and CareerSource Tampa Bay.

I believe we have a committed, professional and dedicated staff. It has been my pleasure to work with them, in this capacity. I have taken my role of supporting staff and the mission of this organization seriously.

As we move forward, the one thing I would ask from the Board is a commitment to move forward with a detailed staffing plan for both regions, clarifying the authority of the Director, Interim and delineating lines of reporting for staff.

Please find attached an outline of some of the specific issues and concerns that I have addressed within the past eight weeks and a copy of my resume for your review. If there is any additional information I can provide to assist with this process, please let me know.

Sincerely,

Jennifer Brackney  
Director, Interim

**SUMMARY OF ACTIVITIES  
February 1, 2018 to Present**

## Jennifer Brackney

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### WORKNET PINELLAS, INC.

Director, Interim (February 1, 2018 – Present)

#### Communications

- Received 8,257 email and responded to over 2,500 email
- Read and tracked 105 articles (Tampa Bay Times, WFLA, Business Journal, etc)
- Read and filed four anonymous letters
- Posted all 2018 Board, Executive, Finance, One-Stop and Workforce Solutions meeting packets and minutes and the 2017 audit online to promote transparency.

#### Public Records Requests and Investigations

- Received and reviewed 74 public records requests, mostly from the Tampa Bay Times and New Channel 8.
- Received and reviewed 17 other requests, including:
  - 3 DEO OCR requests based on anonymous letter
  - USDOL anonymous whistleblower request for information
  - 3 US DOL requests plus 2 Additional USDOL requests
  - DEO/OIG
  - Several requests from Marion Hale

#### Two-Year Modification to the Local Workforce Plan

- Submitted the approved Two-Year Modification to the Local Workforce Plan to DEO.
  - Revised and updated the local workforce development plan for both CSTB and CSPIN.
  - Worked with DEO to obtain an extension so the board members and commissioners had enough time to review and approve the plan.
  - Attended both the CSTB and CSPN Board and Executive committee meeting and Pinellas BOCC to address any questions regarding the plan.

#### Board Meetings, Executive Committee & Special Meetings (12)

- February 9 – Joint Ad Hoc
  - *Purpose was to investigate further into the placement practices. Board counsel conducted a presentation on the CareerSource placement practices, and also addressed the letter from Sheriff Gualtieri, regarding his claim of “forged signature”.*
- February 14 – Executive Committee
  - *Regularly Scheduled Executive meeting. Action items included: CEO administrative leave/Interim Director, Request extension for the Workforce Plan, and withdrawing the charter school application.*
- February 21 - Informational Workshop
  - *Info workshop, opened to both regional boards and the public, to discuss the organizational overview of CSPIN and CSTB. No actions were taken.*
- February 28 – Executive Committee
  - *Special meeting called by Chairman. The purpose was to discuss Mr. Peachey’s employment.*
- March 7 – Executive Committee
  - *Regularly scheduled meeting. Action items included: approving the Workforce Plan: 2-year Modification, and approve the training providers.*
- March 14 – Executive Committee
  - *Special Meeting called by Chairman. To discuss the “Jane Law” “whistleblower letter” and Johnson Pope’s subsequent response. No actions were taken.*

- March 16 – Joint Ad Hoc
  - *Purpose is to receive update on various ongoing investigations, and review organizational and staffing structure. No actions were taken.*
- March 21 – Board Meeting
  - *Regularly scheduled Board meeting. Action items included: approving related party contracts, electing a chair-elect, and a re-vote on Ed Peachey's employment and settlement.*
- March 27 – Board Meeting
  - *Special meeting called by chairman to discuss Ed Peachey's settlement.*
- April 12 – Joint Ad Hoc Meeting
  - *Continue the discussion related to the organizational structure.*

#### **DEO and USDOL Monitoring**

- DEO program monitoring and worked with staff to create a response report (February 1 – February 10)
- DEO Financial monitoring (April 2 – April 6)
- Joint DEO/ETA monitoring regarding governance structure, finance and performance (April 2 – April 20)

#### **Program Operations and Business Services**

- Worked with the Science Center team to piece together information necessary to present to the Commission for Independent Education (CIE) during a hearing held on March 27, 2018 in Orlando. This hearing was imperative for maintaining the Science Center designation as a CyberSecurity School.
- Maintained Program Operations at the Science Center, including Career Ready, STEME, STEM Camp, and CyberSecurity.
- Maintained program operations as it relates to WIOA, SNAP, Welfare Transition, RESEA and other grants.
- Wrote and submitted a CareerSource Florida Apprenticeship Grant.
- Working with the Business Services team to align staffing duties and to ensure we continue to maintain relationships with employers in Pinellas County.

#### **Finance**

- Reviewed financial documents related to expenditures.
- Scheduled an internal audit to review internal controls.
- Working with the Director of Finance to develop a report that allows us to adjust staffing patterns based on available resources

#### **Human Resources**

- A week after Mr. Peachey was placed on administrative leave I was made aware that he continued to have full access to his office and all computer system. I directed HR to revoke that access on Thursday, February 8, 2018.
- Created an organizational chart from an ADP report. According to HR, an organization chart did not exist prior to February 1, 2018.
- Worked with HR and counsel to determine the best way to proceed with several staff terminations, as deemed necessary for the continued operation of the organization.
- Worked with HR and the local police department to investigate the theft of over \$15,000 in visa cards from one of the local one-stops.
- Continue to work with the CSTB Director, Interim to align staff duties with payroll and the organizational chart.

#### **Community Outreach and Continuing Education**

- Maintained responsibilities as a board member for the following: Starvos Workforce and Education Board, Early Learning Coalition, Forward Pinellas Local Coordinating Board and Pinellas Opportunities Council.
- Attended Suncoast HR meetings to maintain my Senior Professional Human Resource (SPHR) certification and to stay informed regarding trends and opportunities in talent management.

**RESUME**

## PROFESSIONAL EXPERIENCE

### WORKNET PINELLAS

Saint Petersburg, Florida

Director, Special Projects

- Provides oversight and leadership in researching and writing federal, state and local grants.
- Implements an annual giving campaign including both email and direct mail, personally solicits sponsorships and conducts fundraising activities.
- Raised over \$2.5M in federal, state and foundation grants, corporate sponsorships, and individual contributions to provide expanded services for pre-vocational training, youth services and educational programs for children.
- Provides leadership for developing and maintaining the local workforce strategic plan.
- Manages projects and contracts to ensure adherence to guidelines and budget.

### MIDSTATE COLLEGE

Peoria, Illinois

Chief Operating Officer

- Reviewed and aligned policy to accommodate the objectives of the organization and to update the staff handbook.
- Provided professional level support leading impactful continuous process improvement initiatives within human resources, career services, security and information technology.

### CITY OF PEORIA

Peoria, Illinois

Director/Workforce Development Manager

- Provided leadership for talent management and workforce planning, including understanding business recruitment needs, managing candidate pipeline, building organizational capacity, and implementing recruitment campaigns.
- Conducted human resource activities in accordance with policies, procedures and applicable law including interviewing, hiring, onboarding, conducting new employee orientations, assigning work, conducting performance evaluations, following collective bargaining agreements, investigating employee issues and managing employee relations.
- Supervised all aspects of career and academic services, including providing career counseling, developing strategies to improve student success and retention, coordinating training workshops, organizing career fairs, identifying student internship opportunities and developing training programs.
- Worked in collaboration with internal departments and outside partner agencies to develop and execute strategic marketing and communication initiatives across a wide variety of channels.
- Coordinated special events including conferences, workshops and the annual meeting.
- Directed and participated in the preparation of departmental budgets and financial reports. Managed procurement activities including reviewing and selecting vendors.
- Maintained positive working relationships with public officials, key community leaders, employers, students, staff, faculty and federal, state and local representatives.
- Motivated and led a high performance, professional team and fostered a success-oriented, accountable environment.

**EDUCATION**

**SENIOR PROFESSIONAL IN HUMAN RESOURCES SPHR CERTIFICATION (2014 – 2018)**

Human Resources Certification Institute (HRCI)

**MASTER OF ARTS (M.A.)**

**TYPE 75 EDUCATIONAL ADMINISTRATION CERTIFICATION**

**BACHELOR OF ARTS (B.A.)**

**ELEMENTARY EDUCATION TEACHING CERTIFICATION**

Bradley University, Peoria, Illinois

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**PROFESSIONAL AFFILIATIONS**

Stavros Career and Education Board, *Board Member*  
Pinellas Early Learning Coalition Board, *Board Member*  
Forward Pinellas Local Coordinating Board, *Board Member*  
Pinellas Job Corp – Community Development Committee, *Member*  
Suncoast Human Resources Association and SHRM, *Member*  
Human Resource Certification Institute (HRCI), *Member*  
National Association of Workforce Board, *Member*  
Illinois Employment & Training Association, *Board Member*  
Midstate College, *Board of Directors, Treasurer (1999-2013)*

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**RECOGNITIONS**

NBC NEWS with Katie Couric, *“American Hero” Award*  
WEEK 25 *“Women in Leadership” Award*  
Bradley University *“ELH Exemplary Alumni” Award*  
Illinois Workforce Partnership *“President” Award*  
InterBusiness Issues *“Forty Leaders under Forty” Award*  
Community Leadership School *“1<sup>st</sup> Place Team Project” Award*  
Illinois Employment & Training Association *“Professional of the Year” Award*  
Toastmasters *“Outstanding Club President” Award*

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**COMMUNITY INVOLVEMENT**

Saint Petersburg Women’s Club, *Member*  
Tazewell Animal Protection Society (TAPS), *Vice President, Board of Directors, Fundraising Committee (2010-2016)*  
OSF Paws for Healing, *Certified Therapy Dogs (2012-2014)*  
Foster Pet Outreach, *Board of Directors (2007-2010)*  
Alpha Chi Omega, *Member*

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**TECHNICAL SKILLS**

Constant Contact • HRIS • Excel • Word • PowerPoint • Outlook