



December 15, 2021 – 8:00 A.M.

13805 58th Street N.
Clearwater, FL 33760

Special Meeting of the Board of Directors
Modified¹ Agenda

- I. Welcome and Introductions** Barclay Harless, Chair
- II. Public Comment**
- III. Roll Call**
- IV. Action/Discussion Item**
 - 1. Approval of Minutes – November 17, 2021 Page 2
 - 2. Final Decision on Whistle-Blower Investigation Page 31
- V. Adjournment**

**All parties are advised that if you decide to appeal any decision made by the Board with respect to any matter considered at the meeting or hearing, you will need a record of the proceedings, and that, for such purpose, you may need to ensure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based.*

**If you have a disability and need an accommodation in order to participate in this meeting, please contact the executive assistant at 727-608-2551 or admin@careersourcepinellas.com at least two business days in advance of the meeting.*

¹ Modified on 12-13-21 to add draft minutes to Action Item 1.





Action Item 1 Approval of Minutes

In accordance with Article VII, Section 1(H), of the approved WorkNet Pinellas By-Laws: Minutes shall be kept of all Board and Committee meetings. Minutes shall be reviewed and approved at the next CareerSource Pinellas Board or Committee meeting as appropriate.

The official minutes of meetings of the Board and Committees of the Board are public record and shall be open to inspection by the public. They shall be kept on file by the Board Secretary at the administrative office of CareerSource Pinellas as the record of the official actions of the Board of Directors.

The draft minutes from the November 17, 2021, meeting of the Board of Directors have been prepared and are provided to the Board for review.

RECOMMENDATION

Approval of the draft minutes, to include any amendments necessary.

**CareerSource Pinellas
Board of Directors Minutes**

Date: Wednesday, November 17, 2021, at 11:45 am.

Location: *Virtual Zoom

Call to Order

Board of Directors Chair, Barclay Harless, called the meeting to order at 11:46 a.m. There was a quorum present with the following board members.

Board Members in Attendance

Barclay Harless, Belinthia Berry, David Fetkenher, Glenn Willocks, John Howell, Kenneth Williams, Kevin Knutson, Lisa Cane, Mark Hunt, Michael Jalazo, Michael Logal, Michele Mathews, Patricia Sawyer, Scott Thomas, Zachary White, Jack Geller, Elizabeth Siplin

Board Members Not in Attendance

Ivonne Alvarez, Jody Armstrong, Andrea Cianek, Candida Duff, Celeste Fernandez, Commissioner René Flowers, Chris Owens, Debbie Passerini, Dr. Rebecca Sarlo

Board Counsel

Stephanie Marchman

Tucker/Hall – Marketing

Lauren Steif

Thomas Howell Ferguson P.A. CPAs

Allison Harrell

Staff in Attendance

Jennifer Brackney, Steven Meier, April Torregiante, Jacqueline DuChene-Heyward, Kris Lucas, Leah Geis

Public Comments

There were no public comments.

Chair's Report

Board Chair, Barclay Harless, received a possible whistleblower complaint on October 29th, 2021, via email. Under this organization's whistleblower policy, in the employee handbook, which was adopted by the board, it provides for the board chair to conduct an investigation he deems appropriate including requesting the assistance of an outside investigator in circumstances where the CEO is the complaint party's direct supervisor or the complaining party is the CEO. In accordance with this policy, Barclay Harless requested the assistance of an outside investigator to investigate the matter. He requested David Harvey, who is a partner at a Tampa law firm Lewis Brisbois. He is a board-certified labor and employment lawyer has provided legal representation for CareerSource Pinellas in the past.

Barclay Harless request from the board, the possible engagement of Mr. Harvey. Needs to see if Mr. Harvey's services would be contained in our insurance policy. If the insurance does not cover such an investigation, Barclay Harless requests that the board approve the hiring of Mr. David Harvey to ratify all actions taken to date on behalf of CareerSource Pinellas up to the amount of \$20,000. Mr. Harvey agreed to maintain the hourly rates that he would if he was paid by our insurance.

Upon Mr. Harvey's completion of the investigation, the complaint and findings will be brought before the board for final decision in accordance with our policy. While the investigation is active and open, all information related to

the investigation is confidential and exempt by law. For more information, please see Florida Statute 119.071(2)(k). Any questions you may have can be directed to our general counsel, Ms. Stephanie Marchman.

RECOMMENDATION


Barclay Harless offered a motion to request board approval for the hiring of Mr. David Harvey to ratify all actions and approve an amount up to \$20,000.

Motion:	Michael Jalazo
Second:	Mark Hunt

The motion that Barclay Harless offered up to the board, requesting the board's approval for the hiring of Mr. David Harvey to ratify all actions and approve an amount up to \$20,000, was approved.

NOVEMBER 2021
CHAIRMAN'S REPORT



Updates for the Board of CareerSource Pinellas



**CAREERSOURCE
PINELLAS
SUCCESS STORY**

Florida Unemployment: At A Glance

The Pinellas County unemployment rate is 3.6%, which is 1.3% lower than the state unemployment rate of 4.9%. In September, there were 18,825 unemployed residents of Pinellas County of a workforce of 515,219 people.

Program Update: By the Numbers

6,684 Individuals at Career Resource Centers


1,303 Employers Served

We are pleased to share that CareerSource Pinellas has been recognized by Thrive by Five with a 2021 Family Friendly Pinellas Award for our family-friendly employment policies.

This countywide pilot program to recognize family-minded employers lays the groundwork for tomorrow's workforce, promotes a strong workforce today, and builds human capital across generations, to help ensure a prosperous and sustainable Pinellas.

Being distinguished in our community for having employment policies which support our Team Members with young children speaks volumes about the organization's priorities and culture.

We thank our former HR Director, Jaclyn Reilly, for submitting this nomination on behalf of CareerSource Pinellas.



Florida Consumer Sentiment Index

Consumer confidence among Floridians dropped for a second consecutive month in September to 76.1, its lowest level in almost eight years. The current consumer sentiment is half a point lower than the levels recorded in May 2020, at the beginning of the coronavirus pandemic's impact to Florida's economy.




Compared to beliefs a year ago, Floridians' views of personal financial situations decreased 1.6 points from 72.7 to 71.1. Expectations for personal finances in a year increased 6 points to 97.1. Women and people over 60 generally reported less-favorable opinions.

Legislation to Know

During the 2021 legislative session, HB 1507 made significant changes to workforce development at the state and local levels to improve transparency and accountability.

On Sept. 21, the Governor's Office of Reimagining Education and Career Help presented an update to the House Committee on Secondary Education and Career Development on its implementation.

Job seekers in Pinellas County and across Florida deserve the best in education and employment opportunities so that they may gain long-term self-sufficiency.



Partner Highlights




On Sept. 30, CareerSource Pinellas partnered with St. Petersburg College to offer a Fall Career Fair at their EpiCenter in Clearwater. The turnout was phenomenal -- approximately 275 job seekers attended, with 28 employers and five training providers on site.

"I wanted to let you know that William started yesterday and is doing awesome!" Melissa Huck - FRS Team
 "Probably the best hiring event we've seen in years. Quality candidates and very well put together." Tracy - Vangard








CEO Report

Workforce Development Summit

The annual Workforce Development Summit is the pinnacle of learning experiences. It convenes workforce professionals from across the state for strategic dialogues, insights into best practices within the industry and beyond, trend analysis and future-scaping, and the most comprehensive networking that exists in the workforce development arena. Michelle Binette was nominated by the Leadership Team for the Champion Award. This

award is given to a frontline team member who provides services to customers. Michelle Binette is a Coordinator and has been with the organization since 2010.

2021 Florida Veterans Workforce Summit

The Veterans Team had the opportunity to attend the 2021 Florida Veterans Workforce Summit. It convenes veteran professionals from across the state for strategic dialogues, insights into best practices within the industry, and offers the opportunity for training and networking.

Legislative Update – HB 1507 Implementation

During the 2021 legislative session, House Bill 1507 made significant changes to workforce development at the state and local levels to improve transparency and accountability.

On September 21, the Governor's Office of Reimagining Education and Career Help presented an update to the House Committee on Secondary Education and Career Development on its implementation.

Reimagining Education and Career Help (REACH)

Vision: Addresses the evolving needs of Florida's economy by increasing the level of collaboration and cooperation among state businesses and education communities while improving training within and equity and access to a more integrated workforce and education system for all Floridians, [FL Statute 14.36](#)

Partners: Executive Office of the Governor, CareerSource Florida, Florida Department of Education, Florida Department of Economic Opportunity, and Florida Department of Children and Families.

REACH Act: What it Does:

- New REACH Office
- Strengthens Partnerships
- Labor Market Estimating Conference
- Credential Review Committee
- No Wrong Door
- Open Doors Grants
- Increased Accountability
 - Money-Back Guarantee
 - Letter Grades
 - Disclosures
 - Performance expectations and reporting for education and public assistance programs
 - Board member – term limits

Results and Key Metrics (2021-2022)

- 6,684 Individuals visited the Career Resource Centers
- 1,129 Businesses connected with business services
- 1,019 Individuals received a referral for employment through Employ Florida
- 350+ Job seekers attended onsite career fairs and recruiting events
- 4,412 Individuals attended career and professional workshops
- 478 Placements in employment through Employ Florida
- 408 Individuals enrolled in WIOA training programs

HR Updates

We currently have a total of 62 employees providing career and business services throughout Pinellas County, including 47 CareerSource Pinellas employees and 15 DEO state-merit employees. During the past 14 months, the majority, 64% of the turnover has been due to resignations. Of the resignations, 50% had active coaching/corrective action. There were two retirements, three positions eliminated due to COVID, two

employees were discharged, and one of our team members passed away. We currently have 47 CareerSource Pinellas employees and 15 DEO state-merit employees.

Career Resource Center Workshops

CareerSource Pinellas hosted 129 workshops with over 4,412 individuals attending. These workshops help individuals develop clarity, and action plans to connect their interests and abilities with career opportunities. Most workshops are held virtually via Zoom through our partnership with SPC.

Fall Career Fair with SPC

August 25: Hosted a Career Fair at Mid-Town.

September 30: Partnered with St. Petersburg College to offer a Fall Career Fair at their EpiCenter in Clearwater. The turnout was phenomenal -- approximately 350 job seekers attended the events, with 58 employers and five training providers on site.

YouthBuild

We are very proud of the YB Team and the success of this program. It has been offered in partnership with Pinellas County Schools and many other community partners. YouthBuild Tampa Bay is designed to provide students with the opportunity to learn while they earn.

Paychecks for Patriots

CareerSource Pinellas will participate in the 9th Annual Paychecks for Patriots hiring event on Tuesday, November 30. Over the past eight years, more than 6,756 veteran candidates and military family members have participated in Paychecks for Patriots events. This special statewide hiring fair is a partnership between the Florida Department of Economic Opportunity, the Florida National Guard, the Florida Department of Veterans' Affairs, participating Florida employers, and CareerSource Florida. The event, being held at the EpiCenter location, will provide many veterans with meaningful employment from businesses who are dedicated to assisting veterans and their families find careers that match their unique skills and aspirations.

Thrive by Five Recognition

In October, Thrive by Five Pinellas recognized CareerSource Pinellas for our family-friendly employment policies at their Family-Friendly Business Awards Ceremony. Thrive by Five is a community-based organization committed to preparing children for kindergarten and celebrates organizations in our community who are taking the lead in creating a comprehensive childcare system by implementing these family-friendly policies in their workplaces. We thank our former HR Director, Jaclyn Reily, for submitting this nomination on behalf of CareerSource Pinellas.

Workforce Development and Economic Development

We welcome and congratulate Dr. Cynthia Johnson to the position of Director of Pinellas County Economic Development. We are also excited to expand the partnership with the St. Petersburg Area Economic Development Corporation (EDC). We look forward to working with economic development to expand opportunities to work together on behalf of the residents in Pinellas County. We are privileged to work with Pinellas Economic Development and St. Petersburg Area EDC in Pinellas County to support businesses and meet their employment needs.

Performance

These 18 Primary Indicators measurements is how USDOL and DEO evaluate the performance of LWDBs. Based on a change in DEO policy, limiting time for extending participation, there was an increase in the number of participants exited from the program in PY'20-21. These participants were the last of the participants on the rolls from previous practices. Last year, CareerSource Pinellas exceeded 14 measures, met 1 measure and there were three performance measures not met. Because Primary Indicators are lagging indicators, those participants that exited last program year are now measured this program year, based on 2nd and fourth quarter after exit employment status. This program year (PY'21-22), there are 15 performance measures exceeding, 1 meeting and 2 not meeting. It is important to maintain contact with all the participants that exited the program to help ensure they maintain employment for 2nd and 4th quarter. There will be a focus on working with these individuals this

year. Additionally, it is extremely important that our frontline team members understand that the services that they provide and the number of placements that occur, directly impact performance/primary indicators. The team must provide career services, help individuals find employment, and then, ensure they keep employment for 2nd and 4th quarter after exit or LWDB 14 will not meet performance. We have to serve customers with heart, and with a focus on results/performance metrics. Focusing on primary indicators, and the individual team member's impact on performance, is a culture shift for the team at CareerSource Pinellas.

Transitions in the Works – IT

- Information Technology: Transition from CTS to LinkTech
- Electronic Data Management System: Transition from CTS ATLAS to Employ Florida
- Migrate EDMS: Migrate data from CTS ATLAS to Employ Florida
- Kiosk Greeter System: Transition from CTS Kiosk to Employ Florida's Virtual One-Stop VOSGreeter Module
- ✓ Website: Transitioned from CTS hosted site to Blue Host
- ✓ CyberSecurity: Transitioned from CTS to Abacode

Transitions in the Works – Programs and Operations

- Case Management System: Transition from ATLAS to Employ Florida
- Case Management Process: Transition from Decentralized to Centralized
- Remote Work: Transition all team members from remote to in-person

Transitions in the Works – Performance Measures

- Performance Measures: Transition to DEO Policy "limits extending participation"
- Performance Measures: Accountability/ownership and goals/metrics at every level

Action Item 1 – Approval of the Minutes – 9.8.21 Board of Directors

The minutes of the September 8, 2021, Board of Directors meeting were presented for approval.

Discussion: None

Motion:	Jack Geller
Second:	Scott Thomas

The minutes were approved as presented. This motion carried unanimously. There was no further discussion.

Action Item 2 – General Counsel Performance Review

On November 20, 2019, the Board of Directors approved the selection of Gray, Robinson, P.A. for legal counsel services to begin on December 1, 2019, as General Counsel to the Local Workforce Development Board, as well as Counsel to CareerSource Pinellas.

As outlined in the By-Laws, the Ad Hoc CEO/Legal Committee will conduct the annual performance and compensation for the General Counsel. The review addresses the approved General Counsel Performance Goals.

The recommendation from this Committee will be presented to the Board of Directors on November 17, 2021. Performance Review: The members of the Ad Hoc CEO/Counsel Committee requested that the CEO of CareerSource Pinellas, complete the performance review, adding her comments prior to submitting it to the Ad Hoc Committee for consideration.

The CEO draft Performance Review is enclosed. Five Legal Services Summary and Litigation Report memorandums are in the board packet.

RECOMMENDATION

Approval of the General Counsel Performance Review for Stephanie Marchman, Gray|Robinson for the PY'2020-2021.

Discussion: None

Motion:	Jack Geller
Second:	Mark Hunt

The Board of Directors made a motion to approve of the General Counsel Performance Review for Stephanie Marchman, Gray|Robinson for the PY'2020-2021.

ACTION ITEM 3 – General Counsel Letter of Engagement Renewal

On November 20, 2019, the Board of Directors approved the selection of Gray, Robinson, P.A. for legal counsel services to begin on December 1, 2019, as General Counsel to the Local Workforce Development Board, as well as Counsel to CareerSource Pinellas.

Based on the General Counsel Performance review, the renewal of the Letter of Engagement for a two-year period is allowable. The Letter of Engagement expires on 11/30/2021. The actual letter of engagement is included the board packet.

RECOMMENDATION: Approval of the General Counsel Letter of Engagement Renewal for Ms. Stephanie Marchman, Gray|Robinson for a two-year period, effective as of 12/1/2021 through 11/30/2023.

Discussion: None

Motion:	David Fetkenher
Second:	Michael Logal

The Board of Directors made a motion to approve of the General Counsel Letter of Engagement Renewal for Ms. Stephanie Marchman, Gray|Robinson for a two-year period, effective as of 12/1/2021 through 11/30/2023.

ACTION ITEM 4 – PY'2021 – 2022 General Counsel Performance Goals

As outlined in the By-Laws, the Ad Hoc CEO/Legal Committee conducted the annual review of performance for the General Counsel. The Performance Review provided the annual goals, initiatives, actions to be taken, and metrics.

The PY'2021-2022 General Counsel Performance Goals are attached.

RECOMMENDATION

Approval of the PY'2021-2022 General Counsel Performance Goals.

Discussion: None

Motion:	Mark Hunt
Second:	Scott Thomas

The Board of Directors made a motion to approve of the PY'2021-2022 General Counsel Performance Goals. The motion carried unanimously. There was no further discussion.

ACTION ITEM 5 – CEO Performance Review

On November 1, 2019, the Board of Directors approved a three-year employment contract for Jennifer Brackney, as the CEO of CareerSource Pinellas. The Board of Directors also approved the CEO performance review, which provided the annual goals, initiatives, actions to be taken, and metrics. As outlined in the By-Laws, the Ad Hoc CEO/Legal Committee conducted the annual review of performance and compensation for the CEO. The review addressed the approved CEO Performance Goals, including Financial Management, Legal Compliance, Strategic Planning, Governance, Accountability and Transparency, Workforce Development Performance, Key

Relationships and Partnerships, and Organizational Leadership. The recommendation from this Committee was presented to the Board of Directors on November 17, 2021.

Performance Review: The members of the Ad Hoc CEO/Counsel Committee submitted their ratings and comments of the CEO's performance review. Ms. Brackney also included her response to the feedback. The consolidated document is enclosed for your review.

RECOMMENDATION

Approval of the CEO Performance Review for Ms. Jennifer Brackney for the PY'2020-2021.

Discussion: None

Motion:	Mark Hunt
Second:	David Fetkenher

The Board of Directors made a motion to approve of the CEO Performance Review for Ms. Jennifer Brackney for the PY'2020-2021.

ACTION ITEM 6 – CEO Compensation Review

On November 1, 2019, the Board of Directors approved a three-year employment contract for Jennifer Brackney, as the CEO of CareerSource Pinellas. The Board of Directors also approved the CEO performance review, which provided the annual goals, initiatives, actions to be taken, and metrics.

Grantee-Subgrantee Agreement

The Grantee-Subgrantee Agreement between Florida Department of Economic Opportunity and CareerSource Pinellas states that:

- No changes to compensation for executive staff of the Board are allowed without documented Board approval and must be in alignment with local policies and procedures. The Board shall ensure that all bonuses, pay raises, and benefits are reasonable and necessary for the successful performance of the award and are a prudent use of federal funds.

Reimagining Education and Career Help Act (HB 1507)

Additionally, during this past regular legislative session, House Bill 1507 (Workforce Related Programs and Services) was passed. The bill took effect on July 1, 2021. In part, the bill made several changes to Section 445.007, Florida Statutes, related to local workforce development boards, that affect the recently revised grantee/subgrantee agreement including issues around reporting of compensation originally required by Executive Order 20-44. This bill adds subsection (13) to Section 445.007 that clarifies and adds additional requirements to the executive order.

- A compensation schedule is due to DEO within 30 days after the end of the board's fiscal year. The schedule will be based on the fiscal year, not the calendar year.
- The list of Board employees to be included in the schedule is expanded to include executives, officers, directors, trustees, key employees, and the highest compensated employees.
- A declaration from the CFO (or designee) attesting to the truthfulness of the information on the schedule is required.
- The schedule must be published on the board's website for a period of three years after its first publication.

2020 and 2021 Salary Cap Information

The Consolidated Appropriations Act, 2021 (Public Law 116-260), signed into law on December 27, 2020, restricts the amount of direct salary that may be paid to an individual under a Federal grant, cooperative agreement, or

applicable contract to a rate no greater than Executive Level II of the Federal Executive Pay Scale. **Effective January 2021, the Executive Level II salary level is \$199,300 (formerly \$197,300 in 2020).**

An individual's institutional base salary is not constrained by the legislative provision for a limitation of salary. The rate limitation simply limits the amount that may be awarded and charged to Federal awards. For individuals whose salary rates are in excess of Executive Level II, the non-federal entity may pay the excess from non-federal funds.

Every year, each local workforce development board is required to complete a spreadsheet of executive salaries and Certify by the CEO and CFO that no salaries in excess of the cap have been charged to Federal grants whether directly charged or charged through indirect cost rates. The spreadsheet and certification are submitted to DEO by March 31.

Comprehensive Review

The Compensation Review approved by the Board of Directors on June 5, 2019, outlines the Job Title Families with their assigned Grade Level and associated salary range (Exhibit H). **The Chief Executive Officer (CEO) is a Grade Level 221 with an associated salary range of \$142,149 (minimum), \$184,794 (mid) and \$227,438 (max).**

Executive Staff Salary

The purpose of today's discussion is the approval of the annual performance review and the range for the merit increase/one-time performance stipend of 0%-5% for the CEO.

*On May 19, 2021, the Board of Directors approved the award of an increase for employees upon the completion of the annual performance evaluation in the form of either a merit increase or a one-time performance evaluation stipend, leaving the delivery method up to the individual employee.

Employee	Position	Salary Effective:		Increase	
		12/1/2020	12/1/2021	Dollar	Percentage
Jennifer Brackney	CEO	\$188,475.30			0-5%

RECOMMENDATION

Approval of the compensation, 5%, for Ms. Jennifer Brackney, CEO effective December 1, 2021, through November 30, 2022, for presentation and approval by the Board of Directors on November 17, 2021.

Discussion: There was discussion among several board members regarding the compensation.

Motion:	David Fetkenher
Second:	Mark Hunt

The Board of Directors made a motion to approve of the compensation, 5%, for Ms. Jennifer Brackney, CEO effective December 1, 2021, through November 30, 2022, for presentation and approval by the Board of Directors on November 17, 2021. Barclay Harless opposed the 5% increase. The motion passed. There was no further discussion.

ACTION ITEM 7 – PY'2021 – 2022 CEO Performance Goals

As outlined in the By-Laws, the Ad Hoc CEO/Legal Committee will conduct the annual review of Performance for the CEO. The Performance Review provides the annual goals, initiatives, actions to be taken, and metrics. The CEO Performance Goals are attached.

RECOMMENDATION

Approval of the PY'2021-2022 CEO Performance Goals.

Discussion: Chair Harless put forth a motion to create an RFP or RFQ for a 3rd party vendor to conduct a 360-degree review of internal management of the organization. The motion did not pass. Ms. Flowers suggested an internal culture survey instead of a 360-degree review, stating that she felt there were a host of external factors that contributed to resignations. Some of those outside influencers she felt played a role in resignations were mental health factors, family issues, starting their own businesses and COVID-19. Ms. Flowers stated there were many different things that played on their performance and employment. Commissioner suggested that the culture survey be tailored to CareerSource Pinellas and the values and objectives of our organization. Chair Harless volunteered to help set up the survey with the assistance of Human Resources. Ms. Brackney recommended that the compensation committee be involved in creating the survey, as they have had a hand in internal employee surveys in the past. Mr. Logal made an official motion for the creation of an internal culture survey. Ms. Flowers seconded the motion.

Motion:	Belinthia Berry
Second:	Michael Jalazo

The Board of Directors made a motion to approve of the PY'2021-2022 CEO Performance Goals. The motion carried unanimously. There was no further discussion.

ACTION ITEM 8 – Annual 401 (k) Plan Audit – Financial Statements and Supplemental Schedule and Report to Those Charged with Governance

WorkNet Pinellas, Inc. 401k Plan is required to have an annual audit by an Independent CPA firm. The Audit Committee approved Thomas Howell Ferguson P.A. to perform a limited scope audit of the 2020 financial statements at its April 29, 2021, meeting and the Board of Directors followed up with their approval at the May 19, 2021, meeting.

As permitted under the Department of Labor’s Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974, the plan administrator instructed Thomas Howell Ferguson P.A. to perform a limited scope audit and thus, they did not perform any auditing procedures with respect to any investment information which was certified by Reliance Trust Company. Thomas Howell Ferguson P.A. did perform audit procedures on employee eligibility, employer and employee contributions, employee loans, etc. Their responsibility is to express an opinion on the 2020 financial statements based on conducting the audit in accordance with auditing standards generally accepted in the United States. Because Thomas Howell Ferguson P.A. performed a limited scope audit, they did not express an opinion on the 2020 financial statements.

The attached financial statements were filed with Department of Labor, along with the organization’s Form 5500, by the filing deadline of October 15, 2021. If any changes are required to the audit report, an amended audit report will be filed. The Department of Labor allows amended audit reports to be filed without penalty as long as Form 5500 is filed timely.

RECOMMENDATION

Approval of the enclosed WorkNet Pinellas, Inc. 401(k) Plan Financial Statements and Supplemental Schedule for the years ended December 31, 2020, and 2019.

Discussion: None

Motion:	Mark Hunt
Second:	David Fetkenher

The Board of Directors made a motion to approve of the enclosed WorkNet Pinellas, Inc. 401(k) Plan Financial Statements and Supplemental Schedule for the years ended December 31, 2020, and 2019. The motion carried unanimously. There was no further discussion.

ACTION ITEM 9 – DEO Internal Control Questionnaire

The Internal Control Questionnaire and Assessment (ICQ) was developed by the Department of Economic Opportunity (DEO), Bureau of Financial Monitoring and Accountability, as a self-assessment tool to help evaluate whether a system of sound internal control exists within the Local Workforce Development Board (LWDB).

The self-assessment ratings and responses should reflect the controls in place or identify areas where additional or compensating controls could be enhanced. Based on the Grantee-Subgrantee Agreement, the ICQ is required to be completed and certified by the Executive Director and Board Chair or their designee and submitted to DEO by September 30. However, DEO extended the deadline to November to allow the CareerSource Pinellas Audit Committee and Board to review and approve the ICQ at their October and November meetings, respectively. Some of the new controls implemented during the last year were as follows:

- Implemented many IT strategic initiatives that strengthened access and physical controls over IT processes
- Hired external firm to perform semi-annual internal monitoring

Employee	Position	Salary Effective:		Increase	
		7/1/2020	7/1/2021	Dollar	Percentage
Steve Meier	CFO	\$ 131,250.34	\$ 137,812.74	\$ 6,562.40	5.0%

- Improved and strengthened Sub-recipient monitoring
- Elimination of supportive service cards
- Renewed 24/7/365 cyber-security monitoring

RECOMMENDATION

Approval of the enclosed 2021-2022 Internal Control Questionnaire and Assessment.

Discussion: None

Motion:	Jack Geller
Second:	Patricia Sawyer

The Board of Directors made a motion to approve of the enclosed 2021-2022 Internal Control Questionnaire and Assessment. The motion carried unanimously. There was no further discussion.

ACTION ITEM 10 – Executive Compensation

The Grantee-Subgrantee Agreement between Florida Department of Economic Opportunity and CareerSource Pinellas states that:

No changes to compensation for executive staff of the Board are allowed without documented Board approval and must be in alignment with local policies and procedures. The Board shall ensure that all bonuses, pay raises, and benefits are reasonable and necessary for the successful performance of the award and are a prudent use of federal funds.

The purpose of this requirement is full and open disclosure that the Board is specifically aware of the compensation for executive staff. At the May 19, 2021, Board meeting, the Board approved the Annual Evaluation process and the range for either merit increases or one-time performance stipends of 0%-5%. All employees' merit increases or performance stipends were within the approved range including the organization's Chief Financial Officer, Steve Meier, who is considered part of the executive staff.

RECOMMENDATION

Approval of the Chief Financial Officer's salary of \$137,812.74, effective July 1, 2021, to comply with the requirements of DEO's Grantee-Subgrantee agreement.

Discussion: None

Motion:	David Fetkenher
Second:	Belinthia Berry

The Board of Directors made a motion to approve of the Chief Financial Officer's salary of \$137,812.74, effective July 1, 2021, to comply with the requirements of DEO's Grantee-Subgrantee agreement. The motion carried unanimously. There was no further discussion.

ACTION ITEM 11 – CareerSource Pinellas: One-Stop Operator and Workforce Services

CareerSource Pinellas continues to navigate change as the organization maintains ongoing efforts to raise the bar and reinforce a culture of integrity, accountability, and transparency.

CareerSource Pinellas would like to initiate the process for exploring available, alternative options for managing day-to-day operations of multiple Career Resource Centers in Pinellas County, Florida and for delivering a broad range of federally mandated workforce services to employers and job seeking customers in the region in accordance with the federal Workforce Innovation and Opportunity Act (WIOA) and other governing laws and rules.

Background: CareerSource Pinellas currently provides direct services as approved by CareerSource Florida. CareerSource Pinellas is the employer of record for 47 employees and manages the DEO state merit and veteran staff. The entity currently contracted to serve as the one-stop operator is Kaiser Group, Inc. dba Dynamic Works.

The primary objective is to provide a high quality, integrated workforce services program using a model of operation that is responsive to the needs of employers and residents of Pinellas County. At present, CareerSource Pinellas has five career center locations strategically located in Pinellas County. Currently, two of the three Career Resource Centers are considered full-service centers. The full-service locations include the integrated employment and career development system coordinated and structured by CareerSource Pinellas. Currently, satellite career center services consist of case management services, walk-in services, and delivery of other basic services (resume writing, job search, etc.).

The Career Resource Centers have two primary customers: employers and job seekers. The Career Resource Centers also provide job seeker customers with training and employment opportunities using an integrated case management system for the delivery of workforce services to customers eligible under Welfare Transition (WT); Workforce Innovation and Opportunity Act (WIOA); Supplemental Nutrition Assistance Program (SNAP); Trade Adjustment Assistance, (TAA); Wagner-Peyser (WP); Veteran; and Reemployment Services and Eligibility Assessment (RESEA) programs.

CareerSource Pinellas is also designated as the administrative entity and grant recipient for federal workforce investment programs in Pinellas County, Florida.

RECOMMENDATION

To initiate the process for exploring available, alternative options for managing day-to-day operations of multiple Career Resource Centers in Pinellas County, Florida and delivering a broad range of federally mandated workforce services to employers and job seeking customers in the region in accordance with the federal Workforce Innovation and Opportunity Act (WIOA) and other governing laws and rules.

Discussion: None

Motion:	Mark Hunt
Second:	Michael Logal

The Board of Directors made a motion to approve the initiation of the process of exploring available, alternative options for managing day-to-day operations of multiple Career Resource Centers in Pinellas County, Florida and delivering a broad range of federally mandated workforce services to employers and job seeking customers in the

region in accordance with the federal Workforce Innovation and Opportunity Act (WIOA) and other governing laws and rules. The motion carried unanimously. There was no further discussion.

ACTION ITEM 12 – Contract Award/Vendor Selection for IT Services

The Board approved the issuance of a Request for Proposal (RFP) for a qualified IT Services Vendor. CareerSource Pinellas followed standard procurement processes and solicited proposals from qualified and experienced entities to provide IT Services. Each proposal was reviewed by the CareerSource Pinellas review team. Paul Ashe, the vCIO, was part of the evaluation team.

Results of review:

Proposer	Overall Score	First Year Cost
Link Tech Computer Services, LLC	92.0	243,000
Network People, Inc.	86.6	280,865
Plexos Group, LLC	74.8	270,000
BleuStream Corp	72.0	159,000
Ricoh-USA, Inc.	62.8	112,725
Newgentek LLC	54.8	429,219

The incumbent firm, Complete Technology Systems, did not submit a proposal. Their current charge is \$23,242, monthly, or \$278,903, annually. The evaluation team requested the two highest scoring vendors, Link Tech Computer Services and Network People, to submit a project plan to onboard CareerSource Pinellas if selected as a vendor.

Based on overall score, knowledge of our network, previous experience performing projects for CareerSource Pinellas offers, proximity to our locations, total cost, onboarding project plan, and understanding of our IT needs, we recommend contracting with Link Tech Computer Services, LLC.

RECOMMENDATION

Approval to enter into contract negotiations and award a contract for the provision of IT Services with Link Tech Computer Services, LLC, for a one-year term commencing January 1, 2022, with up to three one-year renewals. The annual contract amount in the first year will not exceed \$225,000, with 5% maximum annual cost-of-living adjustments, plus \$18,000 for one-time onboarding fees.

Discussion: None

Motion:	Mark Hunt
Second:	Michael Jalazo

The Board of Directors made a motion to approve to enter into contract negotiations and award a contract for the provision of IT Services with Link Tech Computer Services, LLC, for a one-year term commencing January 1, 2022, with up to three one-year renewals. The annual contract amount in the first year will not exceed \$225,000, with 5% maximum annual cost-of-living adjustments, plus \$18,000 for one-time onboarding fees. The motion carried unanimously. There was no further discussion.

ACTION ITEM 13 – Contract Amendment for vCIO

The Board approved the hiring of a virtual Chief Information Officer (CIO) to act as the central point of contact for information technology services at the July 15, 2020, Board meeting. Securance, LLC, was hired effective July 30, 2020, for a period of one year unless terminated or extended by mutual written agreement by both parties. The contract was extended through June 30, 2022. The current amount available for this program year is \$67,750. However, through September 30, 2021, expenses have been \$38,850. The migration of shared drives and home drives to SharePoint and One Drive has resulted in more time than expected to manage the project. As a result,

funds will be extinguished over the next couple of months. With selection and transition to a new IT provider, it is important to have the CIO available to manage this transition.

2020 IT Accomplishments

- Procured, provisioned, and distributed 75 new laptop computers
- Migrated ATLAS, Email (O365), and anti-virus to the cloud
- Reduced monthly network monitoring cost by 40%

2021 IT Strategic Goals

- Install new and improved firewalls
- Procure and install new network switches
- Continue cloud migration by moving file services
- Proactively work with CSP business leaders to provide IT solutions
- Issue RFP for IT services and manage transition to new manage service provider

RECOMMENDATION

Approval to amend contract for Securance LLC, for an additional amount of \$45,000, with total not to exceed \$106,600 through June 30, 2022.

Discussion: None

Motion:	Jack Geller
Second:	Mark Hunt

The Board of Directors made a motion to approve of amending the contract for Securance LLC, for an additional amount of \$45,000, with total not to exceed \$106,600 through June 30, 2022. The motion carried unanimously. There was no further discussion.

ACTION ITEM 14 – Budget Modification for PY’2021 – 2022 – Budget Modification 1 – Budget Modification Presentation Updated

REVENUE:

Total budgeted revenues estimated to increase from \$9,220,310 to \$9,665,948 for an overall increase of \$445,638,424; or 4.8%.

Workforce Innovation and Opportunity Act (WIOA) Programs (Total decrease of \$63,936:

- Changes in actual amounts carried over to 2021-2022 from June 30, 2021:
 - COVID Dislocated Worker grant - \$39,000
 - Apprenticeship Expansion grant - \$20,000
 - Apprenticeship Navigator grant - \$12,000
- Rapid Response grant - \$116,000
 - New grant awarded from DEO
- Budgeted WIOA Supplemental Grant (\$250,000) consistent with prior years. Per DEO, there will not be any Supplemental Grants this fiscal year.

Welfare Transition:

- Increase in Welfare Transition - \$531,574
 - Increased funding from DEO and increased amount carried over to 2021-2022

Employment Services

- Recovery Navigator - \$102,000
 - New grant awarded from DEO

YouthBuild – Department of Labor

- Decrease in spending due to COVID; grant ends May 2022

EXPENSES:

Total budgeted expenses estimated to increase from \$9,120,785 to \$9,566,422 for an overall increase of \$445,638.

Personnel Expenses

- Personnel Expenses expected to decrease \$328,000, or 7.8% from original budget
 - Changes in the mix of the hiring positions that were in the original budget

Program Expenses

- Outreach/Marketing increasing \$25,000
 - Employer outreach associated with Rapid Response grant
- On-the-Job Training (OJT) increasing \$451,000
 - Represents Welfare Transition Summer PAYS Youth program for spending that already occurred during 2021 and anticipated spending for 2022 program.
- Dislocated Worker Grant (DWG) Work Experience increase of \$41,000
 - Increase due to carry over funding from 2020-2021
- Apprenticeships increase of \$14,000 grant - \$1,350,000
 - Increase due to carry over funding from 2020-2021
- Customer Training increasing \$20,000
 - Training associated with Recovery Navigator grant

Professional Fees

- Governmental Relations Fees increased \$10,000
- Professional Services increasing \$25,000
 - Represents increased Tucker Hall (PR/Marketing expenses)
- Contract Labor increased \$148,000
 - Virtual Chief Information Officer - \$68,000; due to higher involvement with 2021 strategic initiatives and transition to new IT service provider
 - Manpower - \$17,000; contract-to-hire position for administrative assistant
 - Compensation Review - \$37,500 (estimated); approved at Compensation Committee
 - Summer PAYS teachers for both 2021 and 2022 programs - \$38,000

Occupancy

- Increased repairs and maintenance (\$17,000) represents painting of St. Petersburg career center

License, Dues and Other Fees

- Increased Staff Training/Education (\$19,575) represents renewal of annual cyber training for staff

RECOMMENDATION

Approval to amendment revenue budgets and resultant modifications to the expenditures budgets.

Discussion: None

Motion:	Michael Logal
Second:	John Howell

The Board of Directors made a motion to approve of an amendment to the revenue budgets and resultant modifications to the expenditures budgets. The motion carried unanimously. There was no further discussion.

ACTION ITEM 15 – Contract Amendment with Gray|Robinson – Governmental Relations Service

There has been a considerable amount of legislative activity regarding workforce-related programs and services. Representation during upcoming legislative sessions continues to be a priority with a partner taking a laser-focused approach on behalf of CareerSource Pinellas and our region’s unique position.

The Board approved the recommendation to amend the current contract with Gray|Robinson to include governmental relations at the March 17, 2021, meeting. Chris Carmody, Gray|Robinson, has substantial experience handling governmental relations matters. Mr. Carmody is the governmental relations partner that played an instrumental role which helped navigate through the channels, read through each bill to highlight areas of concern, and met with key legislators and staff to represent CareerSource Pinellas.

By continuing to work with Mr. Carmody, we will have a voice in the discussions; one that is both focused on CareerSource Pinellas and the region while partnering on behalf of the workforce system in Florida.

Governmental relations is not an allowable activity with grant funds. It is allowable to utilize private/unrestricted funds for this purpose. The current contract was for a flat fee of \$25,000 broken out into five monthly payments through August 31, 2021. Through the end of August 2021, the organization expended \$20,225 for government relations services.

RECOMMENDATION

Approval to amend the existing contract with Gray|Robinson Government Relations Services for an amount not to exceed \$25,000 and re-engage and expand the scope of services to include Governmental Relations for CareerSource Pinellas through June 30, 2022.

Discussion: None

Motion:	Michael Jalazo
Second:	Patricia Sawyer

The Board of Directors made a motion to approve to amend the existing contract with Gray|Robinson Government Relations Services for an amount not to exceed \$25,000 and re-engage and expand the scope of services to include Governmental Relations for CareerSource Pinellas through June 30, 2022. The motion carried unanimously. There was no further discussion.

ACTION ITEM 16 – Work-Based Learning RFP/Youth Work-Based Training

Request for Proposals (RFP) for work-based training for youth. Youth work-based training will serve Pinellas eligible youth who are in-school youth, ages 16-19 years old, and/or out of school youth ages 18-24 years old. Eligibility may be determined as Workforce Innovation and Opportunity Act (WIOA) Youth and/or Temporary Assistance for Needy Families (TANF). The work-based training and learning activities will take place from March 2022 through July 2022.

Work-based learning serves as a bridge between academics and real-world application of knowledge and skills. Students are expected to learn a concept and apply the concept in an authentic real-world way. These real-world projects may be focused on a community need, a challenge from a local business or industry, or a nonprofit organization. The overarching idea is that the true learning occurs when students “do something” or apply the connects they are learning an authentic “real-world” manner.

Generally, work-based learning is structure on a continuum that includes awareness, exploration, and preparation experiences, combined with an individual’s interests, aspirations, and goals. The continuum includes supporting activities and career-specific work-based learning activities.

RECOMMENDATION

Approval of the issuances of a Request for Proposals for Youth Work-Based Training.

Discussion: None

Motion:	Michael Logal
Second:	Belinthia Berry

The Board of Directors made a motion to approve of the issuances of a Request for Proposals for Youth Work-Based Training. The motion carried unanimously. There was no further discussion.

ACTION ITEM 17 – Policy Approval – WIOA Administrative Policy 091 – Local Workforce Development Board Composition and Certification

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The revised WIOA Administrative Policy 091 is presented to the LWDB following this new process. There will be more to follow.

Based on the re-issuance of WIOA Administrative Policy 091, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlighted changes to align with the requirements of the Reimagining Education and Career Help (REACH) Act:

- References updated LWDB Chairperson requirements linked to Administrative Policy 110, concerning Board Governance.
- Limits LWDB Board members to service terms of no more than eight (8) consecutive years for service terms commencing after July 1, 2021, with the exception of government entity representatives.
- Redefines “For Cause” to include gross mismanagement and waste.

RECOMMENDATION

Approval of WIOA Administrative Policy 091 - Local Workforce Development Board Composition and Certification with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Michael Jalazo
Second:	John Howell

The Board of Directors made a motion to approve of WIOA Administrative Policy 091 - Local Workforce Development Board Composition and Certification with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 18 – Policy Approval – TAA Administrative Policy 101 – Trade Adjustment Assistance Training and Other Activities Funding

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Trade Adjustment Assistance (TAA) Administrative Policy 101 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of TAA Administrative Policy 101, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Communicates the requirements for TAA training and other activities, and the procedures associated with training, case management, job search and relocation, and administrative funds.

RECOMMENDATION

Approval of WIOA Administrative Policy 101 – Trade Adjustment Assistance and Other Activities Funding with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Michael Jalazo
Second:	Mark Hunt

The Board of Directors made a motion to approve of WIOA Administrative Policy 101 – Trade Adjustment Assistance and Other Activities Funding with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 19 – Policy Approval – WIOA Administrative Policy 110 – Local Workforce Development Area and Board Governance

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The revised WIOA Administrative Policy 110 is presented to the LWDB following this new process. There will be more to follow.

Based on the re-issuance of WIOA Administrative Policy 110, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlighted changes to align with the requirements of the Reimagining Education and Career Help (REACH) Act:

- Limits the maximum number of terms of the LWDB Chairperson to no more than two (2) terms as Chair.
- References new term limit requirements linked to Administrative Policy 091, concerning Board Composition and Certification.
- Adds a section outlining WIOA Sunshine Provision, Public Disclosure and Transparency.
- Redefines “For Cause” to include gross mismanagement and waste.

RECOMMENDATION

Approval of revised WIOA Administrative Policy 110 - Local Workforce Development Area and Board Governance with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Jack Geller
Second:	Michael Jalazo

The Board of Directors made a motion to approve of revised WIOA Administrative Policy 110 - Local Workforce Development Area and Board Governance with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 20 – Policy Approval – WIOA Administrative Policy 113 – Disaster Recovery Dislocated Worker Grants

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Workforce Innovation and Opportunity Act (WIOA) Administrative Policy 113 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of WIOA Administrative Policy 113, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Provides guidance to LWDBs, LWDB executive directors and management, LWDB and One-Stop staff, and other workforce system partners on the requirements for the administration of Disaster Recovery Dislocated Worker Grants.
- Outlines requirements for funding and eligibility, activities and services, performance and outcomes, worksite coordination, and monitoring.

RECOMMENDATION

Approval of WIOA Administrative Policy 113 – Disaster Recovery Dislocated Worker Grants with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Jack Geller
Second:	Michael Logal

The Board of Directors made a motion to approve of WIOA Administrative Policy 113 – Disaster Recovery Dislocated Worker Grants with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 21 – Policy Approval – WIOA Administrative Policy 114 – Rapid Response Program Administration

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Workforce Innovation and Opportunity Act (WIOA) Administrative Policy 114 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of WIOA Administrative Policy 114, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Provides notification of the minimum Rapid Response requirements and activities mandated by WIOA.
- Outlines the framework for LWDB 14 to design and implement a local business engagement strategy and articulates the role of layoff aversion within effective Rapid Response systems.

RECOMMENDATION

Approval of WIOA Administrative Policy 114 – Rapid Response Program Administration with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Jack Geller
Second:	Belinthia Berry

The Board of Directors made a motion to approve of WIOA Administrative Policy 114 – Rapid Response Program Administration with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 22 – Policy Approval – WIOA Administrative Policy 115 – Wagner-Peyser, Trade Adjustment Assistance – Common Exit

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Workforce Innovation and Opportunity Act (WIOA) Administrative Policy 115 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of WIOA Administrative Policy 115, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Provides guidance on the minimum requirements for the common exit of program participants for WIOA, Wagner-Peyser (WP), and Trade Adjustment Assistance (TAA) programs, and procedural guidance for the associated processes.
- Defines processes intended to ensure efficient and effective integrated service delivery, track coordination of services, and align performance reporting.

RECOMMENDATION

Approval of WIOA Administrative Policy 115 – Common Exit with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Michael Jalazo
Second:	Belinthia Berry

The Board of Directors made a motion to approve of WIOA Administrative Policy 115 – Common Exit with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 23 – Policy Approval – WIOA Administrative Policy 116 – Trade Adjustment Assistance – Trade Adjustment Assistance and Workforce Innovation and Opportunity Act Dislocated Worker Co-enrollment

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Trade Adjustment Assistance (TAA) and Workforce Innovation and Opportunity Act (WIOA) Administrative Policy 116 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of TAA Administrative Policy 116, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Communicates the requirement to co-enroll eligible trade-affected workers in the WIOA Dislocated Worker program, as well as the TAA program, and the associated procedures.
- Defines processes intended to improve performance outcomes, decrease enrollment times, and increase access to supportive services leading to training completion, credential attainment and obtaining suitable employment.

RECOMMENDATION

Approval of WIOA Administrative Policy 116 – Trade Adjustment Assistance and Workforce Innovation and Opportunity Act Dislocated Worker Co-enrollment with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Michael Logal
Second:	Jack Geller

The Board of Directors made a motion to approve of WIOA Administrative Policy 116 – Trade Adjustment Assistance and Workforce Innovation and Opportunity Act Dislocated Worker Co-enrollment with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

ACTION ITEM 24 – Policy Approval – JVSG Administrative Policy 117 – Employment and Advocacy Services

The Florida Department of Economic Opportunity (DEO) has instituted a new process related to Local Operating Procedures (LOPs) that coincides with the release of new administrative policies. The goal of this new process is to ensure DEO is providing the oversight and support needed for Local Workforce Development Boards (LWDBs) to administer and operate workforce programs in a manner that meets federal and state requirements. The process creates a timeline for introducing new and revising current administrative policies issued by DEO.

The Jobs for Veterans’ State Grant (JVSG) Administrative Policy 117 is presented to the LWDB following this new process. There will be more to follow.

Based on the release of JVSG Administrative Policy 117, this Administrative Policy with LOPs includes all the DEO administrative policy requirements.

Highlights:

- Provides guidance on the minimum requirements for delivery of employment and advocacy services to participants of the JVSG program.
- Defines multiple duties and responsibilities of Disabled Veteran Outreach Program Specialists (DVOPs) and Local Veterans’ Employment Representatives (LVERs).
- Policy rescinds DEO Memorandum Disabled Veterans Outreach Program (DVOP) Specialist and Individualized Career Services (ICS) Codes, issued April 1, 2019.

RECOMMENDATION

Approval of JVSG Administrative Policy 117 – Employment and Advocacy Services with Local Operating Procedures (LOPs).

Discussion: None

Motion:	Michael Jalazo
Second:	Jack Geller

The Board of Directors made a motion to approve of JVSG Administrative Policy 117 – Employment and Advocacy Services with Local Operating Procedures (LOPs). The motion carried unanimously. There was no further discussion.

General Counsel Update – Stephanie Marchman, Gray|Robinson

Other Administrative Matters

None

Information Items

Information Item 1 – Subrecipient Monitoring for Period July 1, 2020 – June 30, 2021

2 CFR 200.331(d) requires that awarding agencies “monitor the activities of the subrecipient as necessary to ensure that the subaward is used for authorized purposes, in compliance with Federal statutes, regulations, and the terms and conditions of the subaward.” CareerSource Pinellas conducts business with two entities that are considered subrecipients, Pinellas Education Foundation (Youth Connect) and Dynamic Workforce Solutions (One-Stop Operator).

Pinellas Education Foundation

Period Reviewed – July 1, 2019 – July 31, 2020

Contracted Amount - \$588,583

Observations

- Document and certify cost allocation plan
- Ensure proper internal controls are in place for prepaid supportive services cards
- Strengthen controls surrounding preparation of personnel activity reports
- Utilize training vouchers whenever possible to prevent being overcharged
- Ensure that timesheets are properly approved (repeat of prior year observation)

Technical Assistance

- Document procurement policy consistent with 2 CFR 200
- Florida Reemployment Taxes were not charged to Youth Connect grant
- Strengthen password requirements for financial systems
- Consider revising accounting policies and procedures (repeat of prior year technical assistance)
- Consider applying for an indirect cost rate or elect to charge a de minimis rate of 10% (repeat of prior year technical assistance)

Dynamic Workforce Solutions

Period Reviewed – July 1, 2019 – August 14, 2020

Contracted Amount - \$47,000

Other Non-Compliance Issue

- Recommendation to update indirect cost rate

Observation

- Recommendation to update cost allocation plan

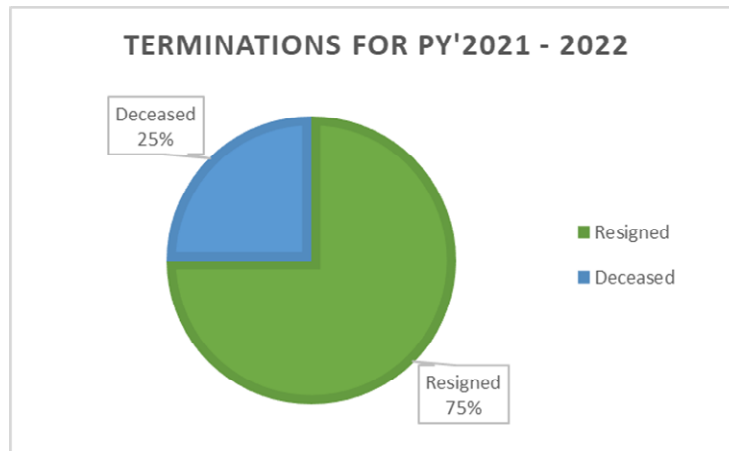
The Internal Control Questionnaire from DEO that each Local Workforce Develop Board (LWDB) is required to complete on an annual basis specifically asks whether LWDB monitors all subrecipients and communicates the monitoring results to the LWDB’s board of directors.

Information Item 2 – Compensation Summary Report

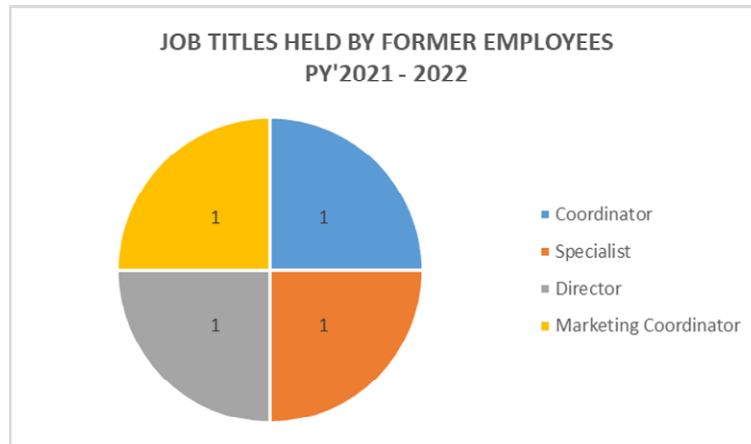
During the November 14, 2019, meeting, the Compensation Committee requested compensation summary reports for review.

Based on this request, we present the following compensation summary reports, including turnover data, the total number of active staff, a pay range summary, notice of newly hired positions, and the average salary.

For PY’2021 – 2022 as of September 23, 2021, four employees exited the organization. The reasons for separation are listed below:



The breakdown of positions for these former employees is as follows:



Additionally, for the program year as of July 1, 2021, a total of three new hires were chosen to join the organization for the following positions:



As of September 23, 2021, CareerSource Pinellas employees 47 individuals, and the average salary is \$54,692 annually.

Information Item 3 – CareerSource Pinellas Pay Range by Job Family

For your review, please see the attached chart detailing pay ranges by Job Family for the 47 active employees as of 09/23/2021.

There is one Technician exceeding the maximum salary threshold due to seniority, having held a position since 06/29/2010.

There is one Navigator exceeding the maximum salary threshold due to seniority, having held a position since 07/01/2009.

There is one Lead exceeding the maximum salary threshold due to seniority, having held a position since 07/01/2009.

There are two Coordinators exceeding the maximum salary threshold due to industry experience.

Information Item 4 – RFQ for 2022 Compensation Review

In February 2019, hrEdge Consulting was retained by CareerSource Pinellas to conduct a Compensation Review. The review was designed to focus on salary range equity externally, as well as internal structure of position titles. The review included the following deliverables:

- Review of all active positions and recommendations for continued, discontinued, and merged position titles.
- Review of external Compensation Survey Reports and analysis of CareerSource ranges for each position.
- Review of CareerSource Pinellas Compensation versus other Florida CareerSource Compensation Structures.
- Development of new pay structure to include Min-Mid-Max for each Grade and the Spread between Grades.
- Analysis of employee impact and cost of implementation.

Job Family Titles										
Job Title Family	Grade Level	No of Employees at min salary	No of Employees at mid-point	No of Employees at max salary	Min Salary	Mid Salary	Max Salary	Actual Salary - Single Position	Annual Benefit Stipend	401(k) Retirement Plan
Technicians	102	2	3	1	\$33,580	\$38,640	\$43,700		\$13,080.00	5% of base pay
Instructor	103				\$36,500	\$42,000	\$47,500		\$13,080.00	5% of base pay
Specialist	103	8	2		\$36,500	\$42,000	\$47,500		\$13,080.00	5% of base pay
Career Counselor	104	7	4		\$39,420	\$45,360	\$51,300		\$13,080.00	5% of base pay
Navigator	104			1	\$39,420	\$45,360	\$51,300		\$13,080.00	5% of base pay
Instructor, Trades	105		1		\$42,574	\$48,989	\$55,404	\$54,995.20	\$13,080.00	5% of base pay
Business Services Representative	105	1	1		\$42,574	\$48,989	\$55,404		\$13,080.00	5% of base pay
Lead	105	1	1	1	\$42,574	\$48,989	\$55,404		\$13,080.00	5% of base pay
Coordinator	206	1	4	2	\$45,979	\$52,908	\$59,836		\$13,080.00	5% of base pay
Supervisor	208	1			\$53,630	\$64,356	\$75,083	\$62,899.46	\$13,080.00	5% of base pay
Partner	210				\$62,555	\$75,065	\$87,576		\$13,080.00	5% of base pay
Director	214	2	1		\$82,943	\$103,841	\$124,741		\$13,080.00	5% of base pay
CFO/COO	219	1			\$121,870	\$158,431	\$194,992	\$137,812.74	\$13,080.00	5% of base pay
CEO	221		1		\$142,149	\$184,794	\$227,438	\$188,475.30	\$13,080.00	5% of base pay
Total Staff		24	18	5						
Percentage		47.06	35.29	9.80						

* Information as of Sept. 23 2021

Grade	Exemption
100s	Non-Exempt
200s	Exempt

An important aspect of being an Employer of Choice includes offering our Team Members the best employment experience possible, which also incorporates robust benefit offerings to support Employees' well-being. To remain competitive in this incredibly tight talent market, CareerSource Pinellas will issue a Request for Quotes (RFQ) from various third-party HR practitioners to conduct an updated Compensation Review.

Information Item 5 – Organizational Chart

As part of the Compliance Review and the request to continuously review and update the Organizational Chart, please see the attached version updated as of July 1, 2021.

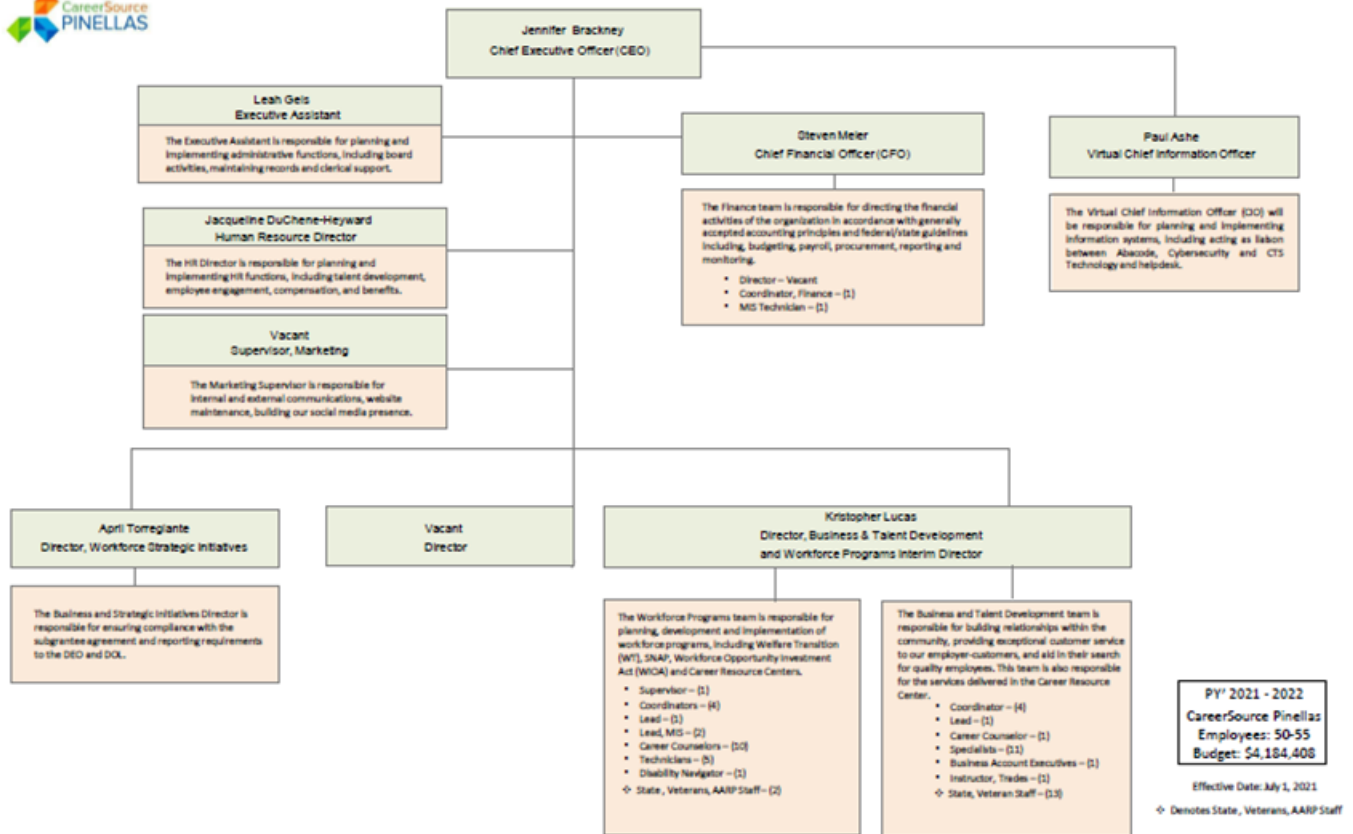
Since March 1, the Finance Department has decreased by one Coordinator. As part of the succession planning efforts within the organization, we are currently sourcing for a senior finance professional to add to the department.

Since the beginning of the current Program Year, the Workforce Programs team has decreased by one Director. The Director of Business and Talent Development has stepped in to serve as the Interim Workforce Programs Director.

The Marketing Coordinator resigned her position with the organization, and at current, Tucker Hall is handling the Marketing function.

Since the beginning of the current Program Year, the organization has welcomed the following employees to the CareerSource Pinellas team:

- Jacqueline DuChene Heyward, Director of Human Resources
- Melissa Ehrhardt, Business Services Coordinator
- Deithre Brown, Business Services Representative



Information Item 6 – Benefits Renewal Process

With the end of the 2021 Benefit Plan Year soon coming to a close, CareerSource Pinellas' HR Director has initiated the Benefits Renewal Process for 2022 Open Enrollment.

HUB International Southeast is CareerSource Pinellas' benefits broker, and two members of their team will be assisting CareerSource Pinellas' HR Director with the insurance renewal process:

- John D. Arcaro, Director of Payroll Services & Employee Benefits Advisor
- Felicia Hernandez, Account Manager

As of September 23, 2021, CareerSource Pinellas' HR Director has scheduled meetings with Mr. Arcaro and Ms. Hernandez to discuss benefit plan details and performance, as well as an outline the next steps for this process. The HR Director plans on focusing benefits plan design around developing a total rewards package that will allow CareerSource Pinellas to further its employer value proposition, as well as attract and retain new top talent.

The Board of Directors approved the Employee Health and Wellness Plan on November 14, 2019.

The Hybrid Benefit Plan is awarded in three parts 1) Medical stipend to equal the premium of the minimum essential plan (\$8,190), 2) Benefit stipend of a flat rate, standardized amount of \$4,390 to spend on cafeteria plan offering of benefits, and 3) Defined benefit of Life Insurance, AD&D, Long and Short-Term Disability. The estimated cost per each employee of the latter is \$500. The cost of the Hybrid Benefit Plan is approximately \$13,080 per employee.

As of September 2021, the current census is 47 eligible full-time employees with 24 employees (55%) currently enrolled in CareerSource Pinellas-sponsored health insurance.

The Benefit Renewal Process for 2022 Open Enrollment will be finalized soon for roll out to employees in December 2021.

Information Item 7 – CSPINs Thrive By Five’s Family-Friendly Employment Policies Award

CareerSource Pinellas’ HR Director was notified by Dr. Paul Wirtz that the organization has won an award from Thrive by Five recognizing our family friendly employment policies. Being distinguished in our community for having employment policies that support our Team Members with young children speaks volumes about the organization’s culture and priorities, and certainly positions CareerSource Pinellas as an Employer of Choice.

Thrive by Five Pinellas is a community-based organization committed to preparing children for kindergarten by building an early childhood system that’s equitable, accountable, and responsive to children and their families.

CareerSource Pinellas was honored at Thrive by Five’s 1st Annual Family Friendly Virtual Business Awards Ceremony, that was held on October 19, 2021.

Information Item 8 – August 31, 2021, Financial Statements

Actual Year-To-Date Results compared to Prior Year

- Surplus for the two months-ended of \$2,226 compared to surplus of \$37,081 last year. Decrease resulted from lower Ticket-to-Work revenue this year (\$19,000), increased governmental relations expenses (\$10,000) and payment of annual Florida Workforce Development Association dues (\$4,250) which are all unrestricted items.
- Federal grant revenue was \$313,000 higher this year; driven by Welfare Transition Summer Youth Program (increase of \$278,000) and Training and Work-based initiatives for COVID Dislocated Worker grant (\$97,000) offset by lower WIOA Dislocated Worker training (\$87,000).
- Personnel expenses were slightly lower than prior year.
- On-the-Job Training expenses of almost \$166,000 represents Summer Youth Program participants wages.
- Dislocated Worker Work Experience of \$63,000 represents wages and fees paid related to COVID dislocated worker grant.
- Youth Stipends this year comprise milestone and attendance payments to YouthBuild students (\$8,200) and summer youth participants (\$2,800)
- Customer training is about \$64,000 lower this year as focus was on summer youth program.
- Internal monitoring is \$26,000 higher this year representing Taylor Hall’s second compliance review in August.
- Contract Labor is almost \$50,000 higher this year; teachers’ wages associated with summer youth program (\$17,600), virtual CIO expenses (\$22,000) and administrative assistant (\$8,600) in contract-to-hire position.
- Increase in Contract IT services attributable to SharePoint and One-Drive data migration.
- Repairs and maintenance this year represents painting of the St. Petersburg career center.

Actual YTD Results compared to Year-to-Date Budget

- Surplus for the month-ended of \$2,226 compared to a budgeted surplus of \$7,467.
- Federal grant revenue higher than budget due to Welfare Transition Summer Youth Program.
- Personnel costs behind budget due to change in the mix of positions.
- Service Provider Contract (with Pinellas Education Foundation) spending behind budget.
- On-the-Job Training expenses of almost \$156,000 higher than budget; represents Summer Youth Program participants wages.
- Dislocated Worker Work Experience of almost \$63,000 represents wages paid related to COVID dislocated worker grant; higher than budget by almost \$43,000.
- Training behind budget by about \$46,000.
- Contract Labor over budget due to teachers’ wages associated with summer youth program, administrative assistant position on a contract-to-hire basis, and more time required by vCIO to manage IT strategic initiatives.
- Contract IT Services slightly higher than budget due to timing of SharePoint and One-Drive migration.

- Repairs and maintenance unfavorable spending; represents painting of St. Petersburg career center.

*Financial statements are available for viewing in the board packet on the CareerSource Pinellas website.

Information Item 9 – Migration of Career Center Kiosk System to Employ Florida – Procurement of VOSGreeter Module PY’2021-2022

CareerSource Pinellas, like all other workforce boards throughout the state, utilizes Geographic Solutions’ Employ Florida (EF) system for case management for all WIOA, Wagner Peyser, and TAA cases. In addition, Florida’s Department of Economic Opportunity (DEO) has required that all case management for Welfare Transition, SNAP, and Veterans transition to EF to consolidate all case management for all DEO funded programs into one system.

CareerSource Pinellas utilizes a proprietary system, ATLAS from Complete Technology System (CTS), as its Document Management System; however, it is in the planning phase of transitioning to EF from ATLAS for its document management system. In addition, CareerSource Pinellas presently uses ATLAS as its kiosk greeter system in the career centers. In order to further integrate with the EF environment, thus increasing efficiency and capability of the CareerSource team, CareerSource Pinellas has made a strategic decision to migrate the kiosk system to EF’s Virtual One-Stop VOSGreeter Module. Customer wait times will further be reduced and will allow for a better customer experience.

Geographic Solutions’ EF system is the preferred vendor of DEO and DEO strongly encourages CareerSource Pinellas to fully utilize Employ Florida. The first-year cost is as follows:

Description	Amount
Initial Setup Fee	\$ 19,950
Annual License Fee	\$ 24,950
Total Cost	\$ 44,900

The current cost of ATLAS is \$6,000 per year as it is bundled with all other CTS services. Since the decision to procure another IT service provider is in process, the cost of ATLAS as a stand-alone product is expected to increase.

Information Item 10 – All Programs Monitoring Schedule

Ron DeSantis
GOVERNOR



Dane Eagle
SECRETARY

Final Programmatic Monitoring Review Schedule Program Year 2021-2022

LWDB	CareerSource	Review Start/End Dates
2021		
11	Flagler Volusia	10/18/2021 - 10/22/2021
2	Okaloosa Walton	10/25/2021 - 10/29/2021
16	Pasco Hernando	11/01/2021 - 11/05/2021
7	Florida Crown	11/15/2021 - 11/19/2021
19	Heartland *	12/06/2021 - 12/10/2021
6	North Florida	12/13/2021 - 12/17/2021
2022		
20	Research Coast *	01/10/2022 - 01/14/2022
12	Central Florida	01/24/2022 - 01/28/2022
21	Palm Beach County*	01/31/2022 - 02/04/2022
5	Capital Region	02/07/2022 - 02/11/2022
13	Brevard	02/21/2022 - 02/25/2022
9	North Central Florida	02/28/2022 - 03/04/2022
18	Suncoast *	03/07/2022 - 03/11/2022
1	Escarosa	03/14/2022 - 03/18/2022
17	Polk *	03/21/2022 - 03/25/2022
8	Northeast Florida	03/28/2022 - 04/01/2022
14	Pinellas	04/04/2022 - 04/08/2022
15	Tampa Bay*	04/11/2022 - 04/15/2022
10	Citrus Levy Marion	04/25/2022 - 04/29/2022
24	Southwest Florida *	05/02/2022 - 05/06/2022
3	Chipola	05/23/2022 - 05/27/2022
4	Gulf Coast	06/06/2022 - 06/10/2022
22	Broward	06/13/2022 - 06/17/2022
23	South Florida*	06/21/2022 - 06/27/2022

*MSFW Significant LWDBs
Last Updated: 09/20/2021

Florida Department of Economic Opportunity | Caldwell Building | 107 E. Madison Street | Tallahassee, FL 32399
850.245.7105 | www.Florida.jobs.org
[www.twitter.com/FLDEO](https://twitter.com/FLDEO) | www.facebook.com/FLDEO

An equal opportunity employer/program. Auxiliary aids and service are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TTD equipment via the Florida Relay Service at 711.

Open Discussion

None

Adjournment

Barclay Harless adjourned the meeting at 1:32 PM.



Action Item 2

Final Decision on Whistle-Blower Investigation

Barclay Harless, Chair, received a whistle-blower complaint on October 29, 2021 (“Complaint”). The Whistle-Blower Policy contained in the Employee Handbook and adopted by the Board (“Policy”) provides for the Chair to conduct investigations he deems appropriate, including requesting the assistance of an outside investigator, in circumstances where the CEO is the complaining party’s direct supervisor or the complaining party is the CEO, with the final decision to be made by the Board.

In accordance with this Policy, Chair Harless asked for the assistance of an outside investigator to investigate the Complaint. Specifically, David Harvey in the Tampa office of Lewis Brisbois, who is a board certified labor and employment lawyer and has provided legal representation to CareerSource Pinellas in the past, was engaged. The Board approved the hiring of Mr. Harvey and ratified all actions he took to date on behalf of CareerSource Pinellas as an outside investigator, up to an amount of \$20,000, at a regular meeting of the Board on November 17, 2021.

Mr. Harvey has investigated the Complaint and issued an investigative report making findings and conclusions with respect to the allegations in the Complaint. The investigative findings and conclusions are now before the Board for a final decision, in accordance with the Policy.

Chair Harless has called this special meeting of the Board pursuant to Article VII, Section 1.F. of the CareerSource Pinellas By-Laws and in order for the Board to make a final decision within the deadline provided by Policy.

Recommendation of the Board Chair:

The Board adopt the findings and conclusions in the investigative report as the Board’s final decision on the Complaint.

The Board refer the findings and conclusions in Section IV of the investigative report to the Compensation Committee for further review and recommended action, if any. Any recommended action of the Compensation Committee shall be submitted to the Board for review and any action the Board deems appropriate.

Attachments: Whistle-Blower Policy, Complaint,² and Investigative Report

² For the same reasons stated in the Investigative Report, the Complainant’s name has been redacted for purposes of this Special Meeting.

MAINTAIN CONFIDENTIALITY:

You are expected to maintain the confidentiality of CareerSource Pinellas' confidential information. Do not create a link from your blog, website or other social networking site to the Company website without identifying yourself as a Company employee. Express only your personal opinions. Never represent yourself as a spokesperson for CareerSource Pinellas. If the Company is a subject of the content you are creating, be clear and open about the fact that you are an employee and make it clear that your views do not represent those of the Company, fellow employees, clients or clients working on behalf of CareerSource Pinellas. If you do publish a blog or post online related to the work you do or subjects associated with the Company, make it clear that you are not speaking on behalf of CareerSource Pinellas. It is best to include a disclaimer such as "The postings on this site are my own and do not necessarily reflect the views of CareerSource Pinellas".

USING SOCIAL MEDIA AT WORK:

Refrain from using social media while on work time, unless it is work-related as authorized by the CEO or consistent with Company policy. Do not use a Company e-mail address to register on social networks, blogs or other online tools utilized for personal use.

PRESERVATION OF YOUR SECTION 7 RIGHTS:

Nothing in this policy will be interpreted or applied by CareerSource Pinellas to interfere, restrain or coerce employees in their exercise of rights guaranteed by Section 7 of the NLRA, including, but not limited to, the rights of employees to communicate with each other regarding wages, hours and terms and conditions of employment, and otherwise to engage in concerted activities for their mutual aid and protection or to refrain from such communications or activities.

Travel

CareerSource Pinellas shall make reimbursement and/or payment for the authorized travel expenses of its officers and employees in accordance with Florida law. To be eligible for expense reimbursement and/or payment, travel shall be for official business or welfare of the Company.

Whistle-Blower Policy

CareerSource Pinellas expects all individuals, including directors, officers, employees, staff, volunteers, contractors, interns, vendors or others, to act in accordance with all applicable laws, rules, regulations, ethical rules and Company policies at all times and to assist in ensuring that the Company conducts its business and affairs accordingly. If an individual has knowledge of unlawful, improper or unethical activities or conduct, he or she is obligated to report it as soon as possible as provided in this policy. Intentional and unintentional violations of laws, regulations, rules, internal controls, policies and procedures may occur and may constitute improper activities as defined within this policy.

The purpose of this whistle-blower policy is to formalize the policy to encourage all individuals to report to the Company, in writing, any activity, policy or practice that violates any law, rule or regulation. As provided by law, the Company does not tolerate retaliation against any individual because that individual has engaged in protected activity. It is a violation of this policy, however, for an individual to report information that the individual knows to be false. This policy does not provide an exhaustive description or recitation of the various laws that may provide protection against retaliation. The Company complies with any and all laws, including those that encourage reporting of misconduct and prohibit retaliation. It takes this obligation very seriously. As a result, the Company has established an initial administrative process for employees who allege that they have been retaliated against in response to activity protected by law. Additionally, any violation of this policy may result in disciplinary action, up to and including termination.

All individuals are obligated to report in writing to the CEO of CareerSource Pinellas, or, if the allegation concerns the CEO, to the Board Chair, any misconduct, improper or unethical activities, or violation of any law, rule, regulation, internal control or policy for investigation. In making a report, the reporting party is requested to be as specific as possible, including identifying witnesses, documents and other sources of information. This reporting may be the individual's only form of complaint or it may be supplemented by a further complaint to outside authority. The contact information for the CEO and Board Chair are as follows:

CEO
13805 58th Street N
Suite 1-401
Clearwater, FL 33760

Chair of the Board of Directors
c/o Equal Opportunity Officer
13805 58th Street N
Suite 1-401
Clearwater, FL 33760

The CEO or Board Chair, if the allegation is made about the CEO, will determine the appropriate investigation and action to be taken after reviewing the written complaint. The CEO or Board Chair must provide a copy of the complaint to the HR Business Partner.

During an active investigation of the complaint, all information related to the investigation is confidential and exempt from public access under Section 119.07(1), Florida Statutes, to the extent provided by law.

The initial administrative remedy for any individual who, after making a complaint, believes that he or she has been subjected to retaliation in violation of law or this policy, is as follows:

1. Within sixty (60) days of the alleged retaliatory action, the individual must make a written complaint to the Company's Human Resources Department. The Human Resources Department can be contacted at:

Human Resources Department
13805 58th Street N
Suite 2-140
Clearwater, FL 33760

2. The Human Resources Department shall provide a copy of the written complaint to the CEO. Within twenty (20) days after receipt of the complaint from the Human Resources Department, the CEO shall schedule a meeting with the individual. The individual may present any evidence or information at this meeting supporting his or her complaint and/or identify witnesses or other supporting documentation. In addition, the individual may be represented by legal counsel at this meeting. The CEO may conduct any investigation he or she deems appropriate, including requesting meetings with other individuals or a follow-up meeting with the complaining party, seeking other information or documents, or requesting the assistance of another internal or outside investigator. Within thirty (30) business days of the meeting with the complaining party, the CEO shall make a final decision and communicate that decision to the individual. The CEO shall have the authority to take any appropriate action, including, but not limited to, reinstating the employee with or without pay or affirming the adverse personnel action.
3. If the CEO is the complaining party's direct supervisor or if the complaining party is the CEO, then the Board Chair shall serve in the role as the CEO in this procedure with the Board making the final decision.

LAW OFFICE OF
NICHOLAS E. KARATINOS, ESQ.

18920 NORTH DALE MABRY HIGHWAY, SUITE 102
LUTZ, FLORIDA 33548
FACSIMILE (813) 949-0373
VOICE (813) 345-5945
TOLL-FREE (813) 898-8703

Admiralty and Maritime Law
Labor and Employment Law
Insurance Litigation

TO: Barclay Harless, Board Chairman
CareerSource Pinellas - Worknet Pinellas

FROM: Nicholas E. Karatinos, Attorney
[REDACTED] Coordinator, CareerSource Pinellas

SUBJECT: Whistle-blower Complaint Pursuant to Policy #019-A12

DATE: October 29, 2021

I represent [REDACTED] for the purpose of filing the instant whistle-blower complaint. This complaint is filed pursuant to CareerSource Pinellas Policy #019-A12. Policy #019-A12 requires that all whistle-blower complaints from CareerSource Pinellas staff be initiated by serving the complaint upon the President and CEO of CareerSource Pinellas, in this instance Jennifer Brackney. Since the complaint is directed against Ms. Brackney, Policy #019-A12 requires that it be filed with the Board Chair. Accordingly, this complaint is filed with you on this the 29th day of October, 2021, by e-mail attachment [barckays.harless@OZK.com]. CareerSource Pinellas is referenced below as C/S/P; [REDACTED] as [REDACTED]

[REDACTED] was initially hired by C/S/P on November 14, 2006, and left her employment on June 30, 2009, for a position with Hillsborough Kid, Inc. She was re-hired by C/S/P on March 15, 2010, and has been employed continuously since that time by C/S/P. Her appraisal for the period July 1, 2019 to June 30, 2020, is attached as Exhibit 1. Her appraisal for the period July 2, 2020 to June 30, 2021, is attached as Exhibit 2. In both instances, her work was rated as excellent. C/S/P recommended [REDACTED] in June 2021 for the “Workforce Champion Summit Nominee” and the “Workforce Excellence” awards. See e-mail attached as Exhibit 3.

In late March, 2021, [REDACTED] spoke to Jaclyn Riley, C/S/P’s director of human resources, as to her concerns with the management decisions of CEO Jennifer Brackney. Since Ms. Brackney’s appointment as CEO in 2018, the C/S/P has suffered with excessive employee turnover which has materially diminished the agency’s ability to serve the public, including: (1) reduced interaction with employers in Pinellas resulting in inability to job match with them. Some employers continue to post job openings with the C/S/P, but staff no longer is available to coordinate with employers to secure jobs for C/S/P job seekers resulting in significantly reduced direct job placements; and (2) reduced services to job seekers who are no longer provided with

individualized assessments for possible employment by C/S/P staff. Currently, job seekers who visit our office no longer meet with a staff member for a skills assessment which would provide guidance and recommendations as to a career path. Their visit is limited to use of the resource room equipment such as a FAX machine, or a computer for them to conduct their own job search, or to apply for unemployment, or for public assistance food stamps or cash assistance. On March 26, 2021, Ms. Riley sent a note to [REDACTED] thanking her for her input, which is attached at Exhibit 3; but, nothing further was achieved from this approach by [REDACTED] to human resources.

[REDACTED] concluded that nothing could be accomplished by seeking improvements in performance by C/S/P top management without going outside the agency. Thus, in June through early August, 2021, at home during evenings and weekends, she wrote her complaints with C/S/P CEO, Jennifer Brackney, in a document attached as Exhibit 5. On August 9, 2021, she sent an unsigned copy of Exhibit 5 to Governor DeSantis, representative Chris Latvalla, representative Chris Sprowls, and to Casey Penn, Chief of One Stop and Program Support for the Florida Department of Economic Opportunity. [REDACTED] is unaware if there was any follow-up by C/S/P. On October 12, 2021, [REDACTED] submitted it under her name to Mr. Penn, and spoke to you as Board Chair for the C/S/P on October that day. She sent a copy of Exhibit 5 to you on the evening of October 13, 2021.

On October 13, 2021, [REDACTED] was reassigned to a new position by Kristopher Lucas, director of business and talent development, and the highest manager in C/S/P other than CEO Brackney. See e-mail attached as Exhibit 6, announcing a "Position Change". [REDACTED] two reports were taken away from her and were reassigned to Caleb Weeks. [REDACTED] was asked to train Mr. Weeks which she did from October 13th to the present and continuing. [REDACTED] did not lose pay.

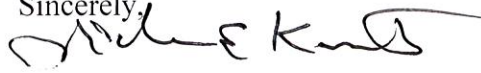
On October 25, 2021, [REDACTED] received a written warning for alleged "Transparency, Accountability, and Integrity". Attached as Exhibit 7. Also on October 25, 2021, [REDACTED] received another written warning, attached as Exhibit 8, for alleged "Not Following a Directive/Insubordination". These written warnings appear to be in retaliation of [REDACTED] voicing whistle-blower concerns.

This complaint is filed to initiate proceedings pursuant to Florida's Public Sector Whistle Blower Act. Please review these matters with your legal advisor. We will make every effort to work with you and the C/S/P to resolve this matter informally.

Please send responses to my e-mail address: nicholas.karatinos@outlook.com. Sent by e-mail to Barklay Harless [barklay.harless@OZK.com] on this the 29th day of October, 2021, by Nicholas E. Karatinos, attorney, together with Exhibits 1 through 8.

Thank-you for your consideration. Please be advised in the premises.

Sincerely,



Nicholas E. Karatinos, Attorney

Concurrence:



Date: 10.29.2021

cc: Jennifer Brackney [jbrackney@careersource.com]



**WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION**

[Redacted]

Job Title: Coordinator

Supervisor: Shawna Peer

	Relative Impact (weight)	Employee's Rating	Supervisors Rating	Final Rating	Points RI x rating	Comments
Soft Skills						
Decision Making	5		3.0	3	15	
Dependability	5		3.0	3	15	
Teamwork / Interpersonal Skills	5		3.0	3	15	
Job Related Skills						
Job Knowledge and Adherence to Policies	5		3.0	3	15	
Quality and Quantity of Work	5		3.0	3	15	
Service Delivery / Communications	5		2.0	2	10	
Goal Attainment (per attached sheet)	70				169.00	
Total Points	100.00	0.0	17.0	17.0	254.00	
Overall Rating					3	

OVERALL EVALUATION COMMENTS

[Redacted]

[Redacted]

7/29/2020

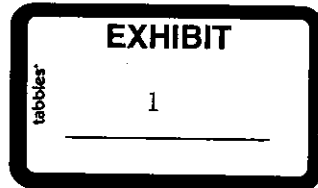
Employee Signature

Date

Supervisor Signature

Date

Rating	Level of Performance	Range of Overall Rating (points)
3	Performance is above standards for the position	201-300
2	Performance meets the standards for the position	101-200
1	Performance is below standards for the position	0-100



WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION

Name: [REDACTED] Job Title: Coordinator, WIOA Supervisor: Shawna Peer

Goals - List and evaluate goals set for this position and employee.	Impact	Self-Eval Rating	Supervisor Rating	Final Rating	Points	Comments
Program Enrollment: Employee will ensure the WIOA team provide access to quality training by successfully enrolling a sufficient number of Adult, Dislocated Workers and Youth into approved training occupations. This will enable the job seeker to acquire education in demand fields with higher wages than basic entry level jobs meeting the needs of local employers.	10		3	3	30	During the 19-20 Program Year, [REDACTED] lead the WIOA team to yet another year of increased enrollments, enrolling 620, of which 50 were Youth. That is highest number of Youth enrollments for the last 3 years.
Accountability via Accuracy: Employee will ensure the WIOA team maintains a high level of accuracy in completing all aspects of case management. This includes but is not limited too required paperwork, data entry/scanning of that paperwork, ensuring files have valid and correct eligibility documentation and all necessary steps are completed in EF prior to submitting a new intake file or RFO to MIS. The agency is focused on an increased level of compliance therefore data will be gathered in a variety of reporting efforts including; MIS compliance reviews, bi-annual internal OSO monitoring, and annual DEO monitoring.	10		2.75	2.75	27.5	By starting the PY by reviewing every training file [REDACTED] was able to train all the CCs and the MIS Lead on how a quality WIOA file is presented for a score of 3. WIOA did have an increase in Findings and ONI in this year's DEO monitoring with 1 finding and 2 ONIs for a score of 2.5 and an overall score of 2.75.

WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION

<p>WP Workforce Development Performance: Employee will promote employer and job seeker connections by ensuring the WIOA team completes a high level of EF staff assisted services and EF job referrals. Job referrals that will be of quality by matching job order details with customer skills. A sufficient number of job referrals should lead to direct placements while employee also maintains a sufficient number of 880/881 placements. EF data entry will show the team has a full understanding of all these performance measures. Success of this goal will also be measured by submission of success stories in order to generate community involvement.</p>	15		1.66	1.66	24.9	<p>The WIOA team completed a total of 29 EF referrals from July 2019 to the present for a score of 1, 151 EF placements for a score of 1. The WIOA submitted more success stories than any other program for a score of 3. Average and overall score is 1.66. The WIOA team is encouraged to increase the number of job referrals provided to customers. By providing quality employment referrals, EF placement numbers should increase.</p>
<p>Increase overall level of public image through quality customer service: Assist in ensuring customers receive customer service that reflects integrity. Methods include timely response to all customer inquires, outreach to customers prior to case action, timely completion of service/training requests, resume assistance, job development and job referrals. Employee will complete and document meaningful attempted contact on a monthly basis. This includes SARA outreach and timely responses to alerts and inquires. SARA will be determined by bi-weekly usage report and a random sample review of response time.</p>	15		2	2	30	<p>When reviewing the overall level of public image, customer contact is not the only factor that has to be taken into consideration. WIOA has made great strides in being the example and all efforts are appreciated. We look forward to working with you, as a vital team member to elevate the overall public image.</p>
<p>WIOA Workforce Development Performance: Specifically MMR/WIOA Indicators and training related employment: Employee will be responsible for meeting or exceeding Regional MMR goals, WIOA Indicators of Performance and training related employments. MMR and training related placements will be based on regional results, Indicators will be based on the most current available state published quarters.</p>	20		2.83	2.83	56.6	<p>All 8 WIOA Indicators are over 100% of the targeted goal for a 3. The combined WIOA wage rate for PY 19-20 is \$25.20 for a score of 3 and the YTD WIOA EER is 99.4% for a score of 2.5. Average and overall score is 2.83, exceeding expectations.</p>

Coordinator; WIOA		
Enrollment into Programs		
AD/DW Training Enrollments (annually for Region):	Youth Training Enrollments (annually for Region):	
3 - More than 200	3 - More than 190	
2.5 - 175 to 199	2.5 - 180 to 189	
2 - 151 - 174	2 - 170 - 179	
1.5 - 135 - 150	1.5 - 160 - 169	
1 - Less than 150	1 - Less than 160	
Accountability via Accuracy		
OSO Monitoring	MIS Compliance Reviews	DEO Monitoring
3 - less than 3 combined WIOA related findings and systemic issues on all 3 audits	3 - 98% and Above	3 - less than 3 combined WIOA related findings and systemic issues on all 3 audits
2.5 - 3 to 4	2.5 - 96 - 97%	2.5 - 3 to 4
2 - 5 to 6	2 - 94 - 95%	2 - 5 to 6
1.5 - 7	1.5 - 90 - 93%	1.5 - 7
1 - More than 7	1 - Below 90%	1 - More than 7
WP Workforce Development Performance (Provided by WIOA Team)		
Referrals	Placements	Success Stories (annually)
3 - More than 500 referral completed by the WIOA team	3 - More than 500	3 - More than 30 stories submitted by the WIOA team
2.5 - 450 to 500	2.5 - 450 - 500	2.5 - 25 - 30
2 - 425 to 449	2 - 425 - 449	2 - 20 to 24
1.5 - 400 to 424	1.5 - 400 - 424	1.5 - 15 to 19
1 - Less than 400	1 - Less than 400	1 - Less than 15
Public Image		
Contact Monitoring:	SARA, Bi- Weekly Usage	
3 - Above 99%	3 - Over 350	
2.5 - 97 - 99%	2.5 - 300 - 350	
2 - 94 - 96%	2 - 250 - 299	
1.5 - 92 - 93%	1.5 - 200 - 249	
1 - Below 92%	1 - Below 200	
WP Workforce Development Performance (Provided by WIOA Team)		
Primary WIOA Indicators	Combined DW & AD Wage Rate YTD:	AD & DW EER
3- All DW/AD Indicators exceed 100%	3- Above \$19	3- 100%
2.5 - 1 Indicator failed to exceed 100%	2.5 - \$18.50 - \$18.99	2.5 - 97 - 99%
2 - 2 Indicators failed to exceed 100%	2 - \$17.50 - \$18.49	2 - 95 - 96%
1.5 - 3 Indicators failed to exceed 100%	1.5 - \$17 - \$17.49	1.5 - 92 - 94%
1 - More than 3 Indicators failed to exceed 100%	1 - below \$17	1 - Below 92%

WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION

Name: [REDACTED] Job Title: Coordinator Supervisor: Shawna Peer

Goals - List and evaluate goals set for this position and employee.	Impact	Self-Eval Rating	Supervisor Rating	Final Rating	Points	Comments
Consistently meeting and exceeding performance and program goals.	20	4	3.5	3.5	70	<p>Indicators: Meets or exceeds state performance goals in 11 of 13 Primary Indicators in the last quarter and 12 of 13 indicators in the previous two quarters. CIP: CSP was awarded performance for 2 of 3 metrics. [REDACTED] is encouraged to continue developing a deeper understanding how to calculate both Primary Indicators and CIP. Additional Performance Goals: [REDACTED] team completed 466 training enrollments with over 86.2% of cases active in WP. While the goal for PY 20-21 was 100% of the caseload to have an active WP w/ PIRL, this practice was stopped during the PY. For PY 20-21, part of the WIOA team's goals included 25% of new enrollments completing training and finding employment within 12 months. While 25.4% of the caseload completed training within 12 months, those cases only had an employment rate of 10.6%, only partially meeting this goal. [REDACTED] team provided 867 service codes and 97 job referrals. Even though the WIOA team did not meet the goal of 50% of job referrals given resulting in employment, [REDACTED] team secured 6 direct placements and 142 other placements.</p>

WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION

<p>Honoring our role as stewards of the public trust by managing human and financial resources respectfully and responsibly.</p>	15	4	4	4	60	<p>For PY 2020-2021, the WIOA continues to thoroughly assess the suitability of each applicant for eligibility and appropriateness to receive WIOA training services, to ensure funds are only spent on applicants that need training to remain or retain employment leading to self-sufficiency. Career Counselors receive regular training to equip them with the knowledge to maintain a program where funds are spent in accordance with federal, state and local guidance and do so with integrity. All WIOA Career Counselors were able to ensure that 25% or less of their caseload had training closed for more than 6 months.</p>
<p>Contributing to and ensuring the successful implementation of the goals and key initiatives outlined in the Strategic Plan, including accountability, communicating the vision and developing robust partnerships.</p>	15	4	4	4	60	<p>During PY 2021- The individuals on the WIOA team have worked to strengthen the relationships with existing partners of CSP, as well as developed new relationships within the community. The WIOA program relies on great partnerships in order to ensure we are providing quality services to all participants. Demonstration of strong partner relationships has been evident by the success of WIOA OST AD, DW and OSY programs as well as the special projects implemented within the PY. ██████████ is encouraged to highlight the customer service that the WIOA team provides with the submission of Success Stories throughout the PY as only 2 Career Counselors on her team reached their Success Story goals for PY 20-21.</p>
<p>Conducting ongoing review of current programs to ensure alignment with policy guidance from USDOL, DEO, CSF, and the Board of Directors. Establishing standard of work and follow SOPS and Desk Guides.</p>	25	4	5	5	125	<p>Commitment to WIOA policy, at the federal, state and local levels is a strength of the CSP team. ██████████ was instrumental in updating WIOA Local Operating Procedures, flow charts, and Desk Guides for PY 20-21. Continuous review of guidance has resulted in the development of best practices that led to zero findings in the DEO audit.</p>

WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION

Additional goals.	0				0	
Total:	75				315	

By my signature below, I confirm that I have received and reviewed the performance standards and objectives for my CSPIN position. I understand that I will be rated based on a scale that will award either: "5 Exceptional Performance"; "4 Successful Performance"; "3 Meeting Performance"; "2 Developing Performance"; "1 Not Meeting Performance" which requires a written performance improvement plan.

Staff Signature: _____

Date: ____/____/____

management _____

Signature: _____

Date: ____/____/____

**WORKNET PINELLAS
STAFF PERFORMANCE EVALUATION**

Employee Signature

6/2/2021
Date

Kristopher Lucas
Supervisor Signature

8/1/2021
Date

Rating	Level of Performance	Range of Overall Rating (points)	Range of Increase (points)
5 Exceptional Performance	Consistently exceeds the performance expectation of the position.	451-500	5%
4 Successful Performance	Consistently meets and often exceeds the performance expectation of the position.	351-450	4%
3 Meeting Performance	Consistently meets and may occasionally exceed the performance expectation of the position.	251-350	2%-3%
2 Developing Performance	Exhibits inconsistent job performance, but has the capacity to improve to meet the performance expectation of the position.	151-250	1%
1 Not Meeting Performance	Consistently fails to meet the designated performance performance expectation.	0-149	0%

CareerSource Pinellas Staff Evaluation

SOFT SKILLS JOB RELATED SKILLS STANDARDS/EXPECTATIONS

<p>DECISION MAKING</p> <p><i>Seek Solutions:</i> We go beyond the superficial to find the root cause. We ask meaningful questions until all possible excuses are removed. We incorporate data, experience and intuition when making decisions.</p>	<p>Prioritizes conflicting demands, exercises good judgment, delegates authority, takes appropriate action based on reliable data.</p> <p>Demonstrates the ability to identify a problem, gather information, critically evaluate options, seek alternative perspectives to identify root causes and develop prompt, practical solutions to the problem after taking into consideration resources, constraints, opinions of others and alternative courses of action.</p> <p>Focuses on solving the problem as opposed to blaming someone for it.</p> <p>Brings proposed recommendations to supervisor in a timely manner.</p> <p>Separates assumptions or anecdotal information from hard evidence.</p>
<p>DEPENDABILITY</p> <p><i>Ownership:</i> We take responsibility for our mistakes and our results (and our teams). We quickly acknowledge our mistakes and are honest about our shortcomings and ask for help. We hold ourselves accountable. We look upstream and downstream for all potential impacts of actions and decisions and are responsible for bringing solutions forward. We keep our word and we do what we say we will do. We lead by example. We are responsible with confidential and sensitive information. We particularly seek feedback from all levels and change based on lessons learned.</p> <p><i>Integrity:</i> We do what is right even when no one is looking. We uphold our values at all times. We own our mistakes and we apologize and forgive, even when not asked.</p> <p><i>Earns Trust:</i> We do what we say we are going to do. We are open, transparent, positive and clear in our communications. We deliver difficult messages with sensitivity and empathy. We commit to consistently providing performance feedback, expectations, plans and strategy and the "why" behind them. We apologize when necessary and</p>	<p>Meets deadlines and completes projects on schedule; Follow through; honors commitments</p> <p>Exhibits regular and punctual attendance and remains on task for the duration of the assignment.</p> <p>Is constantly relied upon by others - can be counted on.</p> <p>Produces consistent results time and time again.</p> <p>Demonstrates efficient time management skills by effectively using available work time to the greatest advantage.</p>
<p>TEAMWORK / INTERPERSONAL SKILLS</p> <p><i>Champion our Culture:</i> We embody our Mission, Vision and Values and set the example for our people. We bring our competencies to life through each interaction, conversation, email and activity. We seek opportunities to educate and inspire others to exhibit desired competencies. We clearly articulate the "why" behind each competency. We align our daily interactions and decisions with our competencies and our culture.</p> <p><i>One Team-Inclusion & Belonging:</i> We recognize the value in our differences. We celebrate and encourage differing opinions, ideas and solutions. We know we are better when we all have a voice, feel respected and invited to the table. We listen to understand, we serve others, make personal connections and are wholehearted in our interactions.</p> <p><i>Collaborate, Learn & Be Curious:</i> We seek to understand first. We ask questions when unsure. We have a passion for learning and acknowledge when we don't know something. We seek opportunities to learn and leverage all resources available. We have a genuine curiosity to learn and grow.</p>	<p>Maintains professional and positive relationships with supervisors, peers, and subordinates; exhibits positive leadership; provides and accepts input in a constructive manner.</p> <p>Demonstrates the ability to work with others as a team and express individual viewpoint while considering and learning from the input of others. Shows respect for the opinions of others. Works successfully with others that have different personalities to find a mutually agreeable outcome.</p> <p>Demonstrates integrity, fairness, positive attitude, flexibility, adaptability, helpfulness, diplomacy, tact, optimism, empathy, tolerance of others, deals effectively with stress, and a collaborative attitude.</p> <p>Fosters a team approach; encourages input and involvement where appropriate; is accessible to other employees; recognizes and acknowledges others' accomplishments; creates a cooperative atmosphere.</p> <p>Is able to recognize both the strengths and weaknesses of co-workers and adjusts behavior, interactions and expectations accordingly.</p> <p>Is cooperative; willing to assist co-workers as needed to get the job done on time and accurately. Attempts to bring about agreement and understanding; even in a situation involving conflict.</p>
<p>QUALITY and QUANTITY OF WORK</p> <p><i>Raise the Bar:</i> We seek opportunities to make the best even better in every moment. We champion ideas, innovate and give 100%. We speak up, even when it's unpopular. We challenge the status quo in order to achieve excellence. We clearly define excellence and its measures. We model quality through our methods, resourcefulness and results. We inspire and encourage others in their strengths.</p>	<p>Demonstrates the ability to consistently produce work that is comprehensive in scope, complete in detail, accurate in content, and neat in appearance.</p> <p>Demonstrates the capability to produce an acceptable volume of work at a rate consistent with time available, working conditions, resources and schedules.</p> <p>Quality of work does not suffer to achieve quantity.</p> <p>Demonstrates timely completion of work; able to adjust to changes in work demands to meet expected timetables; works at sufficient pace to perform the essential functions of the job and the work assigned accurately and in a timely manner.</p> <p>Effectively manages multiple tasks and responsibilities in an organized and efficient manner.</p>
<p>SERVICE DELIVERY / COMMUNICATIONS</p> <p><i>Agility & Adaptability:</i> We empower employees and simplify processes to work faster and more efficiently. We foster an environment where employees freely share new ideas. We look for ways to reduce redundancy and dependency on antiquated processes and systems looking to automate what we can allowing for faster and meaningful response to internal and external influences. We quickly respond to external and internal changes and influences to serve the business and our customers.</p> <p><i>Customer Experience:</i> We start with the customer and work backward. We earn our customers' trust with each and every interaction. We recognize both internal and external customers and strive to exceed expectations. We understand our customer's perspective and problem solve through the eyes of the customer. Advocate for our customers in meetings and decisions. Recognizes and seeks feedback from internal and external customers.</p>	<p>Operates with a customer-friendly approach and responds expeditiously to customer needs (both external and internal customers) and service delivery issues. Gives a high priority to customer satisfaction.</p> <p>Demonstrates a dedication to exceeding the expectations and requirements of internal and external customers. Goes out of way to be courteous, tactful and helpful even in unpleasant situations.</p> <p>Represents our organization in a positive and informative manner. Presents a professional image.</p> <p>Communicates accurately, clearly, and appropriately, orally and in writing, to customers, supervisors and employees. Ensures that communications are understood; understands oral and written communications from others. Demonstrates good listening skills.</p> <p>Keeps appropriate parties informed of activities, problems, ideas and decisions.</p>
<p>JOB KNOWLEDGE & ADHERENCE TO POLICIES & PROCEDURES</p>	<p>Possesses and displays the technical knowledge of all essential duties of the job and the various concepts, methods, desk guides/department procedures, techniques and skills necessary for efficient completion of tasks. Demonstrates the ability to apply this knowledge and skills in meeting the requirements of the job.</p> <p>Remains up-to-date on changes in technical / programmatic knowledge related to the job.</p> <p>Follows written and verbal instructions; seeks clarity from supervisor if job duty or task is not thoroughly understood.</p> <p>Demonstrates the ability to effectively and quickly adapt to and master changing, modified policies, desk guides, and instructions with a positive attitude and minimal disruption of productivity and the work environment.</p> <p>Adheres to the organization's policies as issued. Questions supervisor about any policy that is not thoroughly understood.</p> <p>Interprets and applies policies accurately and consistently.</p>



FW: Notification - Summit Nominees



1 message

@careersourcepinellas.com>


Tue, Oct 26, 2021 at 10:45 AM



Program Coordinator
CareerSource Pinellas
2312 Gulf to Bay Blvd.
Clearwater, FL 33765

@careersourcepinellas.com


Fax: 727-791-5891

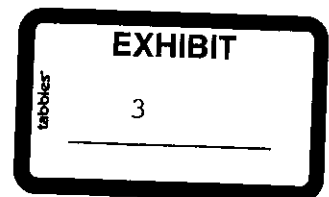


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[REDACTED] & Rebecca,

April said it well, so please read below.

Kindly,

Kristopher D. Lucas, MBA

Director, Business & Talent Development

CareerSource Pinellas

13805 58th St. North, Suite 2-140

Clearwater, FL 33760

klucas@careersourcepinellas.com

Cell: 727-415-4386

Fax: 727-534-4350



Visit us at www.careersourcepinellas.com

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From: April Torregiante <ATorregiante@careersourcepinellas.com>

Sent: Tuesday, August 3, 2021 2:41 PM

To: Kristopher Lucas <klucas@careersourcepinellas.com>

Subject: Notification - Summit Nominees

Importance: High

Kris,

The Workforce Champion Summit Nominee will be contacted today for an interview by the FWDA Summit Committee. Would you please notify [REDACTED] that she has been nominated for this honor? They will ask her about her passion

for workforce and what drives her to do the work she does, among other things. Her responses are reflective of CareerSource Pinellas and will be taken into consideration during the committee's decision-making process.

You may also want to notify Rebecca that she has been nominated for the Workforce Excellence award, as well. I do not believe there will be an interview for that award nominee.

Thanks!

April Torregiante

Director, Workforce Strategic Initiatives

CareerSource Pinellas

13805 58th St. North, Suite 2-140

Clearwater, FL 33760

atorregiante@careersourcepinellas.com

Tel: 727-608-2356

Fax: 727-534-4350



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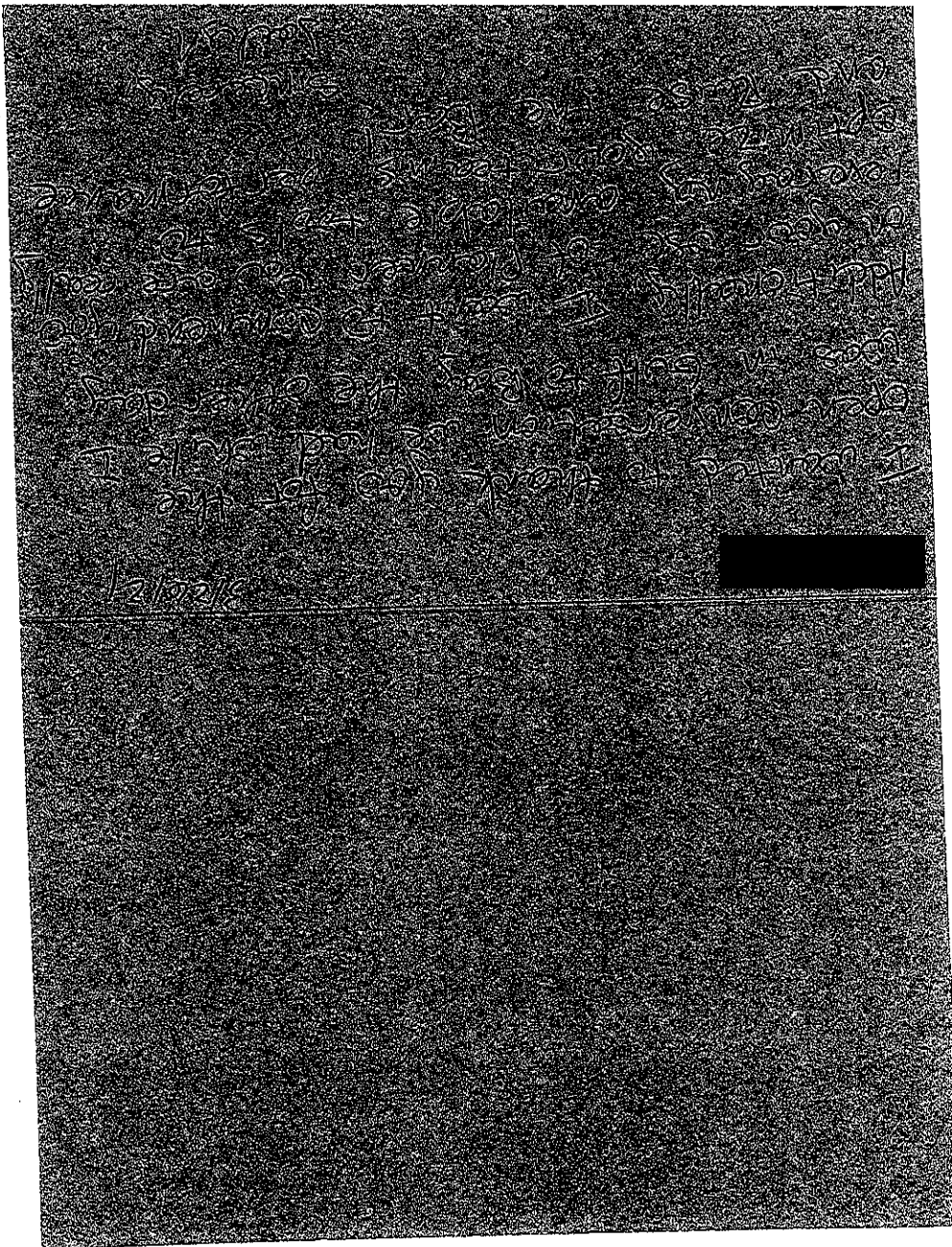


EXHIBIT
tabbles
4

Good Morning,

This letter is being submitted on behalf of the stakeholders of CareerSource Pinellas regarding the egregious misuse of power and gross mismanagement of federal workforce programs by Chief Executive officer (CEO) of CareerSource Pinellas, Jennifer Brackney.

You are receiving this urgent request for help as a result of the CSP Board of Director's failure to respond to multiple complaints of egregious misuse of power and gross mismanagement of federal workforce programs which has only accelerated the decline in ability to achieve agency objectives. Currently, without immediate intervention, any ability for CSPIN to return to being an asset to the community is solely dependent on actions taken with the information provided in this document.

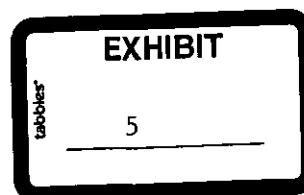
In efforts of being concise and objective, documentation of the failure to execute of her role as CEO of CareerSource Pinellas in this report directly corresponds to the governing contracts outlining the requirements of the position.

Ms. Brackney has provided nothing to the community except the illusion of a productive workforce agency. In short, the truth of what Ms. Brackney has achieved during her tenure as CEO of CareerSource Pinellas is the demise of an already struggling workforce agency. The lack of attention to the purpose of the Workforce Innovation and Opportunity Act, and compliance with program guidance is evident in the following summary of the failures to the community and of agency objectives.

Ms Brackney has developed a system that inflates participants through mandating agency staff to enroll every individual entering the Career Centers as participants into WP whether receiving reportable services or not. Job seekers are receiving limited Basic Career Services, and staff that once provided workforce services to job seekers are now tasked with data mining to report employment. The system has created the appearance that CSP is effective in connecting job seekers to employment, but is nothing more than reporting employment on those that obtained employment themselves.

State representatives are questioning the failures of the Florida workforce system; this report attempts to shine light on how the manipulation of data and recording of employment that was obtained without CSP assistance can be documented as success. In the last two years, CSP has greatly reduced the workforce once in place and required to provide adequate service provision. Services have been limited to UI assistance, use of resource rooms with only minimal staff assistance, WIOA occupational Training and case management of SNAP and WT. She presents as though she is motivated with passion to achieve the mission of CSP, however, her lack of transparency, mistreatment of staff and attention focused only on image has resulted in almost ten million dollars spent to connect 22 direct placements of job seekers to employment.

The numbers of Services provided, job referrals, Career Center visits and website traffic show extensive need for the workforce services, so how does the budget of almost ten million dollars come down to 22 direct placements. The answer is because Ms. Brackney is manipulating numbers and achieving only technical compliance of program requirements, and has stripped Pinellas County residence of Career Services.



The report only touches on a few of the constraints Ms. Brackney has created in achieving the mission of serving Pinellas County, however, due to the rapid escalation of the demise of CareerSource, we ask that you care about the Pinellas County residents, as Jennifer Brackney has so clearly demonstrated she does not. Actions speak louder than words, please look into her actions, without doubt, you will see the created of a façade of a workforce agency, enrolling participants and reporting income without any true service provision. Ms. Brackney is articulate and able to present success to you, but the lack of transparency and effectiveness can be seen if investigated. Furthermore, due to the urgency of the concern, time has not permitted the completion of addition support of Ms. Brackney's failure to be transparent and multiple other topics of concern that affect the success of CSP.

Observations of non-compliance of Interlocal Agreement with Pinellas County. Full Document attached

3. Duties and Responsibilities of CSPIN

The County hereby designates CSPIN as the local subgrant recipient and local fiscal agent for all WIOA and workforce development programs operating within this Local Workforce Development Area ("Program"). In that capacity, CSPIN shall act as its own administrative entity, and be responsible for all Program activities as required by the Acts, including and/or subject to the following:

- A. CSPIN shall employ personnel to carry out the effective and efficient operation of the Program and to provide necessary technical assistance to CSPIN, acting in partnership with the County as provided herein, including establishing an Ad Hoc Chief Executive Official/Excutive Director and Legal Counsel Selection Committee to screen and rank candidates, with the membership and specific duties to be determined in the bylaws

Observation-

The CEO of CSPIN, Jennifer Brackney has failed to comply with the duties and responsibility identified and agreed upon within the Interlocal Agreement with Pinellas County. As CEO of CareerSource Pinellas, Jennifer Brackney has failed to employ the adequate Personnel necessary to meet the operational objectives of the agency. The immense reduction of personnel providing services to the entire County of Pinellas, combined with the crippling absence of workforce development knowledge and disregard for program regulations within the executive management team at CSPIN, guarantees continued failure to meet objectives of the workforce programs that Jennifer Brackney is responsible for delivering to the community.

Observational Support-

The consequence of excessive turnover, inconsistent guidance, abusive leadership, elimination of partner agency presence and assistance to the service structure at CareerSource Pinellas lack of workforce development experience of executive management, Ms. Brackney has designed workforce system that fails to provide significant value to the workforce of Pinellas County. Despite endless requests to increase staffing to

accommodate community need, Ms. Brackney has reduced the Career Services, Business Services and Program personnel so extensively that the staffing structure does not allow the time to provide services that truly connect job seekers to employment.

Reduction of CSP Workforce-

From the date Ms. Brackney accepted the role as Interim CEO, the sheer reduction of the workforce at CSP (Attachment A) is astounding. The effects of the continuous turnover within administration, eliminated positions, discontinued partner contracts, terminations, resignations, and employees retiring have been crippling. Many of the eliminated positions and/or contracted partners functioned as support to the provision of workforce services; the absence of the support has greatly impacted the ability to achieve the CSP mission.

Department	Responsibilities	Staffing Structure
Resource Rooms	<p>Provide Career Services and technical assistance to all job seekers visiting Career Service Centers and document according to policy mandates for approximately one-hundred job seekers per day at Gulf to Bay and St. Petersburg Locations; five to fifteen daily at Lealman and Tarpon locations.</p> <p>NOTE- The Lealman and Tarpon Springs resource rooms are staffed with managers of programs, creating a secondary concern where program management and oversight is being compromised</p>	<p>St. Petersburg Career Center 2 AJC Team Members Gulf to Bay Career Center 2 AJC Team Members Lealman 1 AJC Team member Tarpon Springs 1 AJT Team Member</p>
SNAP-	Provide Career Services and program case management for all SNAP participants in Pinellas County in accordance with federal, state and local policy/guidance.	2 Career Counselors
WTP-	Provide Career Services and program case management for all WTP participants in Pinellas County in accordance with federal, state and local policy/guidance.	2 Career Counselors
WIOA-AD/DW	<p>Initial contact, orientation, assessment, intake, and enrollment(if applicable) for applicants of the WIOA AD/DW training assistance program. (Over eleven hundred WIOA OST online applications completed in PY 2020-2021)</p> <p>-Provide ongoing and effective case management from enrollment through post closure follow-up, for all WIOA participants for Region 14. (Caseloads of over 100 participants per Career Counselor. Note. In addition to working with WIOA AD/DW applicants/participants, one Career Counselor also tasked with handling all DWG applicants, not reported in WIOA OST online applicant completers data above. The Same Career Counselor completes the intake and enrollment activities for the CSF Soft skills grant as well as PWE and OJT enrollments.</p>	3 WIOA Career Counselors
WIOA Youth	<p>Initial contact, orientation, assessment, intake, and enrollment(if applicable) for applicants of the WIOA youth training assistance program.</p> <p>Provide ongoing and effective case management from enrollment through post closure follow-up, for all WIOA youth applicants for CareerSource Pinellas.</p>	1 Career Counselor (currently out on Maternity leave)
BSU Account Executive	Creating partnerships with employers, educating them on the benefits to them for participating in work based training; completing all agreement and program required documentation gathering and reporting, managing job orders, recruitment of perspective applicants, sharing partnership information to all staff and available employment opportunities, solving any conflicts or concerns related to participants working with employers for OJT, PWE, supporting employers, ensuring employer compliance with program expectations and regulations.	1 Account Executive
Note:	Any special projects/programs, events etc. are executed by program staff that are already unable to affectively complete the duties of their roles due to staffing constraints.	

Staff Turnover-

Alarming turnover within the roles of Executive Assistants, Marketing Personnel, Directors and Human Resources alone should have activated scrutiny by the CSP Board of Directors. Yet, despite multiple attempts to seek assistance from the CSPIN Board of Directors regarding the mistreatment of staff, so severe that three Program Directors resigned prior to being able to secure new employment, nothing was done by the Board of Directors to protect the employees of CSP, and in turn, the success of the federal workforce programs. Even as recently as August 5th, during the Compensation Committee, Ms. Brackney was questioned about the excessive resignations, which Ms. Brackney responded with “Covid has had everyone really assessing their lives”, which was accepted and ended the discussion of the topic. Please do not read this report and dismiss the abusive treatment and affects to the workforce programs as it has been done to date. Although, in time CSP performance will support this report, and her ability to lead the agency will be questioned, the community needing workforce services cannot wait.

- B. CSPIN shall organize and train such staff as necessary to conduct the functions and operations of CSPIN as provided herein;

Observation:

As already documented, Ms. Brackney has failed at implementing a successful organizational structure for CSP, she has also demonstrated no commitment to the training and development of the LWDB workforce professionals as demonstrated on the year-to-date CSP expenditure report within the Finance Committee Agenda Packet on February 28, 2021.

In addition to the lack of quality training provided to the CSP Workforce Professionals to ensure the required skill to meet agency objectives, and failure Ms. Brackney has positioned an inexperienced new hire as Director of all Programs, Employer Services and Career Services personnel. As seen in the Organizational chart below, there is one single Director, who holds no experience with workforce programs, in charge of all implementation and oversight of programs and services. Staff have no guidance and when guidance is given, it fails to comply with federal mandates.

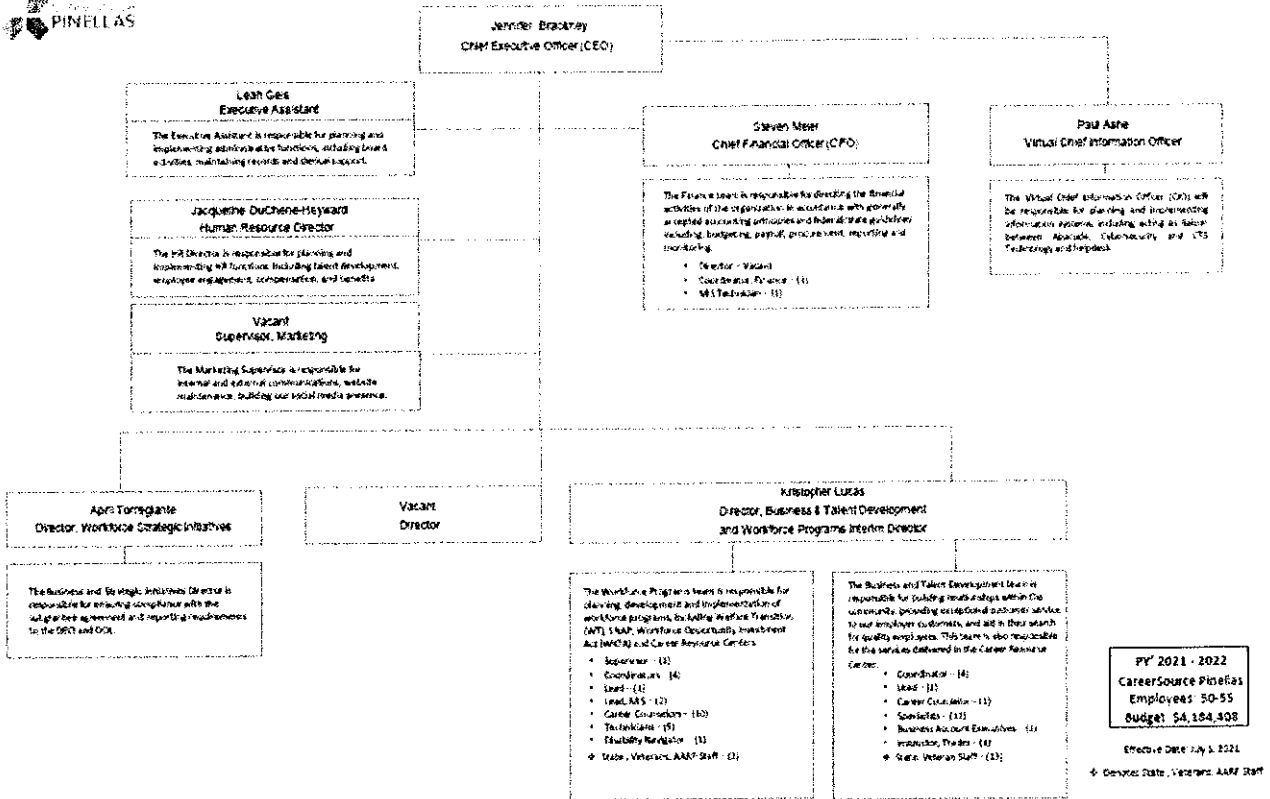
Observational Support:

CSP Expenditure report 02/28/2021

Very little attention is paid to ensuring staff development. Training is obtained through online webinars, and emails sent to staff to read and sign as a result of issues found on program audits.

Pooled Costs

<u>Expenditures to Date:</u>	WIOA	Employment services	WTP	SNAP	TAA	Total Direct Grants and Special Projects	Total
Program Cost Pool							
Business Services	223,197	21,311	100,957	6,019	-	-	351,484
One-Stop Operating	30,780	177,918	71,154	-	5,033	-	284,885
MIS\Technology	35,842	206,106	108,869	-	4,311	-	355,128
Outreach and Marketing	4,560	29,434	15,695	-	595	-	50,284
Staff Training and Development	-	5,219	2,866	-	-	-	8,085
Indirect Program Costs	5,583	1,918	4,059	64	74	886	12,584
Administrative	404,328	115,631	208,676	41,965	8,433	29,351	808,384



c. CSPIN, through the actions of said personnel and as authorized, approved or directed by the CSPIN Board of Directors, shall:-

1. Develop and implement policy and program procedures for program management, planning, operation, evaluation and other necessary functions;

Observation:

Ms. Brackney does not follow policy and program procedures related to employee performance evaluations.

Observational Support:

While working with senior management on performance evaluations for PY 2019/2020, Ms. Mrs. Brackney mandated Directors to lower the scores for the majority of the evaluations with no consistency or documented reasoning. Mrs. Brackney also initially instructed the DEO Staff Manager to issue an eval below what is allowable under DEO without justification. The scores had to be changed upon the supervisor addressing the requirement with the Director.

For PY 2020/2021, Ms. Brackney revised the employee evaluations to be subjective to allow for manipulation of ratings.

2. Conduct oversight with respect to activities, programs and expenditures under

WIOA and such other federal programs that assign responsibility for oversight over programs, activities and expenditures. Oversight shall include monitoring related to administrative costs, duplicated services, internal controls, career counseling, record maintenance and retention, economic development, equal access, compliance and accountability, and performance outcomes;

Observation:

Ms. Brackney has failed to adequately Conduct oversight of the CSP programs, activities and expenditures.

Observational Support:

Support for non-compliance relating to oversight of programs, activities and expenditures is provided in alternate sections of this report. No response here is in efforts to prevent redundancy, not as a result of compliance.

3. Develop and administer a system to hear and resolve all grievances or complaints filed by participants, subcontractors or other interested parties, subject to approval by the County, as required by the Acts, Regulations or State Laws,;

Observation:

Ms. Brackney has not created a system that successfully addresses the grievances or complaints files by participants, subcontractors, or other interested parties. Fear of retaliation and observing failed attempts to seek Board assistance, has left those wanting to file a complaint/grievance without hope that such reports would be handled fairly and professionally.

Observational Support:

Observation-In response to the hostile work environment created by Ms. Brackney, multiple current and former employees discussed concerns with Human Resources, as well as provided information to multiple members of the CSPIN Board of Directors. Lack of action taken regarding the abuse of staff and failure to execute successful program operations documents non-compliance with this duty and responsibility of CSP.

4. Adopt and update corporate bylaws with input from and subject to approval by the County;

Observation:

Although updated, Ms. Brackney has failed to comply with elements outlined in the CSP by laws.

Observational Support:

See non-compliance observations of bylaws in this report.

Non-Compliance of BY-LAWS of WorkNet Pinellas

The provisions of this document constitute the By-Laws of WorkNet Pinellas, Inc., a Florida not-for-profit corporation, which shall be utilized to govern the management and operation of WorkNet Pinellas, Inc. for all purposes.

CSPIN Bylaws. Article II-Purpose and Use of Funds

Section 1-Purpose (A-D)

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

- A. To deliver customer-focused Value-added workforce solutions designed to meet the specific needs of customers, both employers and job seekers alike.

Observation: Under direction of Jennifer Brackney, CareerSource Pinellas (CSP) fails to deliver customer-focused value-added workforce solution to the job seekers and employers of Pinellas County. During her Tenure as Chief Executive Officer (CEO) for CSP, the quality and quantity of workforce programs and career services previously offered to jobseekers and employers of Pinellas County, have either been eliminated or minimally are significantly downsized. Dedicated job seekers are not able to be connected to local employers due to limited staffing not being able to quality relationships. Where CSP staff have maintained the ability to refer job seekers, do not have adequate time to follow up with job seekers and/or employers for placement follow through. Staff are also limited to ability for community based partner referrals, resulting in Career resource centers not being adequately staff to provide employment/career services.

Employer engagement has also been at an all-time low due to the staff deficiencies in the Business Services Unit over the last two years. Jennifer Brackney has constructed a chiseled down workforce or staffing totaling forty-eight employees to end Program Year (PY) 2020-2021. Forty-eight employees cannot successfully set up a large workforce agency for success, especially one with the increased need for workforce services in a county as populous and diverse as Pinellas County. Ms. Brackney has only delivered constraints to serving the community, added barriers for job seeker, added barriers to the existing limited staff and has utilized the federal workforce funds to paint a picture of successful operations when the real unused data provided within this will show otherwise.

The impact of the excessive turnover and lack of filling vacant positions has resulted in a lack of quality service provisions and customer or participation success. The data reported below/within this document has been reported to the appropriate governing entities and published on the CSP website, however, no-one has addressed the shortcomings in the success of CSP in meeting agency objectives. As a non-profit entity that is provided an operational budget of \$9,681,044 to establish and maintain an effective workforce system while complying with federal/state/local regulatory requirements. It is beyond comprehension how a budget of close to ten million dollars can be justified with service and program status information as outlined below.

Data below, obtained from the 06/08/2021, Workforce Solution Committee Meeting Agenda packet <https://www.careersourcepinellas.com/wp-content/uploads/2021/06/06.08.21-Workforce-Solutions-Committee-Packet-1.pdf> demonstrates a failed workforce system.

Training Programs

OST and WBT Programs-Decrease in enrollment and completers for OST and WBT from PY 19/20. Additional notes of observation within image. Excerpts from the packet include observations to the

Occupational Skills and Work-Based Training							Observations
Category	PY 20-21 YTD(03/31/21)			PY19 -20			
	Enr	Comp	Served	Enr	Comp	Served	
AD/DW	210	192	1,079	541	303	832	<ul style="list-style-type: none"> The numbers identified as served are based on those who have received services and those participants enrolled in training, where the PED of activities have been extended despite having no involvement with CSPIN; PED's were extended to not allow negatives per direction of senior management to manipulate performance. LWDB definition of serve is not an accurate representation of customers receiving services and/or contact to not include automated responses. LWDB should consider redefining definition of services to match Department of Economic Opportunity (DEO) definition of service.
Youth	124	8	318	187	6	235	
OJT	2	1	2	0	2	6	
OJT-Young Adult	4	2	4	7	1	7	
Total	340	276	1,403	735	367	1,080	

Paid Work Experience (PWE) and On-the-Job Training (OJT) -Total enrollments for PY 2020/2021

Below reporting supports CSP inability to obtain Paid Work Experience and On the Job Training opportunities to the community. Observations for failure to provide these services is the consequence of maintaining a lack of sufficient personal and experience within the organization.

Eight youth enrolled into Paid Work Experience and Two participants enrolled into On-the-Job Training, although extremely concerning, is shadowed by the fact that the development and execution of the PWE program has not been void of questionable practices. A few examples of concern-

- Participants of the work-based training program did not receive payment for part or all of their employment/training period.

- None of the individuals enrolled into PWE or OJT (aside from Pinellas Works and DWG placements) were of participants seeking OJT/PWE work based training assistance. All participants were either reverse referrals from the employer or participants identified by reviewing participants in case loads for placement into available WBT opportunities.
- Continued partnership with employer that terminated an individual after the employer verified the job seeker began employment because the participant did not meet requirements of the job which is required for OJT placement.

Paid Work Experience:

From 07/01/2020-03/31/2021 CSP enrolled eight youth into Paid Work Experience

Period	Performance	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
PY 2019-2020	Total Funding Expended													\$242,224
	# of Enrollments	0	0	1	0	0	0	0	0	0	0	1	6	8
	# of Completers	0	0	1	0	0	0	0	0	0	0	0	6	6
	# of Employers	0	0	1	0	0	0	0	0	0	0	1	2	4
	Avg Placement Wage	0	0	11	0	0	0	0	0	0	0	10	10	\$10.19
PY 2020-2021	Total Funding Expended													\$137,412
	# of Enrollments	3	0	1	0	0	0	0	2	2				8
	# of Completers	0	0	2	1	1	0	0	0	0				4
	# of Employers	2	0	0	0	0	0	0	2	1				5
	Avg Placement Wage	13.00	0	11.00	13.00	12.00	0	0	12.25	12.25				\$12.00

On-the Job Training:

From 07/01/2020-03/31/2021 CSP enrolled two participants into the OJT program.

Period	Performance	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
PY 2019-2020	Total Funding Expended													\$0
	# of Enrollments	0	0	0	0	0	0	0	0	0	0	0	0	0
	# of Completers	0	0	0	0	0	0	0	0	0	0	0	0	0
	# of Employers	0	0	0	0	0	0	0	0	0	0	0	0	0
	Avg Placement Wage	0	0	0	0	0	0	0	0	0	0	0	0	0
PY 2020-2021	Total Funding Expended													\$2,684
	# of Enrollments	0	1	0	0	0	1	2	0	0				2
	# of Completers	0	0	0	0	1	0	0	0	0				1
	# of Employers	0	1	0	0	0	2	0	0	0				3
	Avg Placement Wage	0	0	0	0	12.75	0	0	0	0				\$12.75

Apprentice Programs PY 2020-2021-

Below data and my bullet points will show contradiction with board of directors reporting.

1. New and ongoing apprenticeship since 2018 enrollments are only occurring with "JATC"
2. Lack of apprenticeship enrollments is concerning with the state awarded Apprenticeship grant and reporting as though CSP is successful with Apprentice programs is false.
3. As referenced above, the locally incorrect definition of served demonstrates skewed reporting to CSP Board of Directors

Programs:	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD PY'20-21 # Total Served	YTD PY'19-20 # Total Served
JATC	62	62	67	59	58	58	55	55	52				62	73
RACCA	27	27	27	30	30	30	30	30	26				30	38
Central Florida Meat and Frost	1	1	1	2	2	2	2	2	1				2	4
International Union of Engineers	2	2	2	2	2	2	2	2	2				2	11
Ironworkers	2	2	2	2	2	2	2	2	2				2	5
Plumbers and Pipefitters	36	36	36	42	42	42	42	42	42				43	45
LWDB Totals	130	130	135	137	136	136	133	133	125				141	183

Employment Services

The date reported below is to demonstrate the significant decrease in services for job seeker, which supports the accusation that an emphasis is based only on recording employment, not providing services to actual assist job seekers with workforce services

Job Fairs- significant decrease in offered events

PY2019-2020

Date	Type	No. of Employers	No. of Job Seekers
7/23/19	Professional Career Fair	5	106
8/14/19	Hospitality & Customer Service Career Fair	29	179
9/26/19	Pinellas Intern Fair	10	63
10/23/19	Manufacturing Career Fair	18	74
11/13/19	Veteran/General Career Fair	52	98
1/30/2020	New Year, New You Career Fair	25	75
2/20/20	Hospitality and Customer Svc Career Fair	15	20
3/26-4/1/20	Virtual Career Fair	24	55
6/10/20	Tampa Bay Tech Virtual Job Fair	12	155
Total		190	825

PY2020-2021

Date	Type	No. of Employers	No. of Job Seekers
9/15/2020	Fall Virtual Career Fair	12	104
Total		12	104

Virtual Courses-

Virtual Courses						
Categories:	Q1	Q2	Q3	Q4	YTD PY20-21	YTD PY19-20
	# Utilized	# Utilized	# Utilized	# Utilized	YTD Utilized	YTD Utilized
Florida Ready to Work	25				25	73
eCourses	43				43	775
Penn Foster	14				14	38
LWDB Totals	82				82	886

Employability Workshops-

PY 20-21: Employability Workshop Attendance					
# Attendees	QTR 1	QTR 2	QTR 3	QTR 4	YTD
	315				
PY 19-20: Employability Workshop Attendance					
# Attendees	QTR 1	QTR 2	QTR 3	QTR 4	YTD
	2,232	1,985	1,831	316	6,364

Professional and Career Networking Groups

Period	Performance	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
PY 2019-2020	Attendees	172	196	112	94	61	88	159	74	54	53	133	140	1,336
	Placements	10	15	25	13	13	16	16	16	23	8	10	21	186
	Average Wage \$	31.08	22.61	17.95	27.10	0	28.00	21.00	32.10	13.10	20.00	34.62	23.56	\$22.68
PY 2020-2021	Attendees	122	260	166										548
	Placements	1	5	9										15
	Average Wage \$	25.00	15.00	33.62										\$24.54

NEW Virtual Recruitment Events – former In-House Recruitments Events

Period	Performance	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	YTD
PY 2019-2020	# IHR Events	17	18	13	10	4	8	10	14	0	0	0	0	84
	# IHR Job seekers	141	214	137	92	10	53	106	85	0	0	0	0	838
PY 2020-2021	# VR Events	0	1	3										4
	# VR Job seekers	0	4	0										4

Placement Data:

The data reported, for placement of job seekers through 03/31/2021 of PY 2020-2021 demonstrates the significant mismanagement of the federal workforce programs. The purpose of such programs are to directly connect job seekers to employment in the community. With the budget provided to CSP, the direct placement of only 22 job seekers is unacceptable at best. Furthermore, many of the participants identified as being placed directly, were reverse referrals for the OJT/PWE programs.

Period	Service	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
PY 2019-2020	Direct Placements	13	18	12	7	5	8	1	2	1	1	1	0	65
	Staff Entered Obtained Employment	88	91	105	69	95	86	79	78	59	15	30	99	892
	Automated Obtained Employments	313	262	299	340	120	197	237	188	276	171	114	133	2858
	Total	412	369	416	416	220	289	317	268	336	187	145	232	3607
PY 2020-2021	Direct Placements	1	2	1	4	5	5	1	3	0				22
	Staff Entered Obtained Employment	40	31	39	13	17	27	22	36	16				241
	Automated Obtained Employments	199	147	118	139	155	204	186	169	180				1,497
	Total	240	180	158	156	235	236	209	208	196				1,818

Period	Service	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD
PY 2019-2020	Customer Self Referrals	1812	1777	1745	1553	1709	1976	2079	1515	2232	1533	1464	1434	20,829
	Staff Assisted Referrals	619	502	474	479	414	307	416	436	177	46	52	82	4,004
	Total	2431	2279	2219	2032	2123	2283	2495	1951	2409	1579	1516	1516	24,833
	Unique Customers													5,195
PY 2020-2021	Customer Self Referrals	1653	934	902	670	658	490	454	361	180				6,342
	Staff Assisted Referrals	150	132	171	323	120	444	523	478	308				2,649
	Total	1803	1066	1073	993	778	934	1017	839	488				8,991
	Unique Customers	502	292	282	250	205	273	274	230	138				2,446

Employability Skills Training Workshops-

Below data and my bullet points will demonstrate how contracting employability skill workshops has lessened overall customer services and connectivity of job seekers with employment.

- Laid off staff that provided services outside of just teaching classes
- LWDB Team members, previously when providing direct instruction were able to provide continued services not available through a contractor.
- Contractor offers severely less availability to workshops without any personal customer service.
- Additional staff time, while having limited staff, are required to research and date enter attendance of participation of the UI claimants to prevent loss further loss of benefits.



June 2019 Employability Skills Training

Monday	Tuesday	Wednesday	Thursday	Friday
9 Job Search 8:30-11:30 10/15/19	9 Employability in 60 Minutes 8:30-10:00 10/15/19	9 Employability in 60 Minutes 8:30-10:00 10/16/19	9 Professional Interviewing Skills 8:30-10:00 10/17/19	9 Employability in 60 Minutes 8:30-10:00 10/18/19
10 Resume & Cover Letter 8:30-10:00 10/22/19	10 Employability in 60 Minutes 8:30-10:00 10/22/19	10 Employability in 60 Minutes 8:30-10:00 10/23/19	10 Business Development 8:30-10:00 10/24/19	10 Employability in 60 Minutes 8:30-10:00 10/25/19
11 Resume & Cover Letter 8:30-10:00 10/29/19	11 Employability in 60 Minutes 8:30-10:00 10/29/19	11 Employability in 60 Minutes 8:30-10:00 10/30/19	11 Business Development 8:30-10:00 10/31/19	11 Employability in 60 Minutes 8:30-10:00 11/01/19
12 Resume & Cover Letter 8:30-10:00 11/05/19	12 Employability in 60 Minutes 8:30-10:00 11/05/19	12 Employability in 60 Minutes 8:30-10:00 11/06/19	12 Business Development 8:30-10:00 11/07/19	12 Employability in 60 Minutes 8:30-10:00 11/08/19
13 Resume & Cover Letter 8:30-10:00 11/12/19	13 Employability in 60 Minutes 8:30-10:00 11/12/19	13 Employability in 60 Minutes 8:30-10:00 11/13/19	13 Business Development 8:30-10:00 11/14/19	13 Employability in 60 Minutes 8:30-10:00 11/15/19
14 Resume & Cover Letter 8:30-10:00 11/19/19	14 Employability in 60 Minutes 8:30-10:00 11/19/19	14 Employability in 60 Minutes 8:30-10:00 11/20/19	14 Business Development 8:30-10:00 11/21/19	14 Employability in 60 Minutes 8:30-10:00 11/22/19
15 Resume & Cover Letter 8:30-10:00 11/26/19	15 Employability in 60 Minutes 8:30-10:00 11/26/19	15 Employability in 60 Minutes 8:30-10:00 11/27/19	15 Business Development 8:30-10:00 11/28/19	15 Employability in 60 Minutes 8:30-10:00 11/29/19
16 Resume & Cover Letter 8:30-10:00 12/03/19	16 Employability in 60 Minutes 8:30-10:00 12/03/19	16 Employability in 60 Minutes 8:30-10:00 12/04/19	16 Business Development 8:30-10:00 12/05/19	16 Employability in 60 Minutes 8:30-10:00 12/06/19
17 Resume & Cover Letter 8:30-10:00 12/10/19	17 Employability in 60 Minutes 8:30-10:00 12/10/19	17 Employability in 60 Minutes 8:30-10:00 12/11/19	17 Business Development 8:30-10:00 12/12/19	17 Employability in 60 Minutes 8:30-10:00 12/13/19
18 Resume & Cover Letter 8:30-10:00 12/17/19	18 Employability in 60 Minutes 8:30-10:00 12/17/19	18 Employability in 60 Minutes 8:30-10:00 12/18/19	18 Business Development 8:30-10:00 12/19/19	18 Employability in 60 Minutes 8:30-10:00 12/20/19
19 Resume & Cover Letter 8:30-10:00 12/24/19	19 Employability in 60 Minutes 8:30-10:00 12/24/19	19 Employability in 60 Minutes 8:30-10:00 12/25/19	19 Business Development 8:30-10:00 12/26/19	19 Employability in 60 Minutes 8:30-10:00 12/27/19
20 Resume & Cover Letter 8:30-10:00 12/31/19	20 Employability in 60 Minutes 8:30-10:00 12/31/19	20 Employability in 60 Minutes 8:30-10:00 1/01/20	20 Business Development 8:30-10:00 1/02/20	20 Employability in 60 Minutes 8:30-10:00 1/03/20

KEY: **1** - CareerSource Pinellas; **2** - CareerSource Pinellas; **3** - CareerSource Pinellas; **4** - CareerSource Pinellas; **5** - CareerSource Pinellas; **6** - CareerSource Pinellas; **7** - CareerSource Pinellas; **8** - CareerSource Pinellas; **9** - CareerSource Pinellas; **10** - CareerSource Pinellas; **11** - CareerSource Pinellas; **12** - CareerSource Pinellas; **13** - CareerSource Pinellas; **14** - CareerSource Pinellas; **15** - CareerSource Pinellas; **16** - CareerSource Pinellas; **17** - CareerSource Pinellas; **18** - CareerSource Pinellas; **19** - CareerSource Pinellas; **20** - CareerSource Pinellas

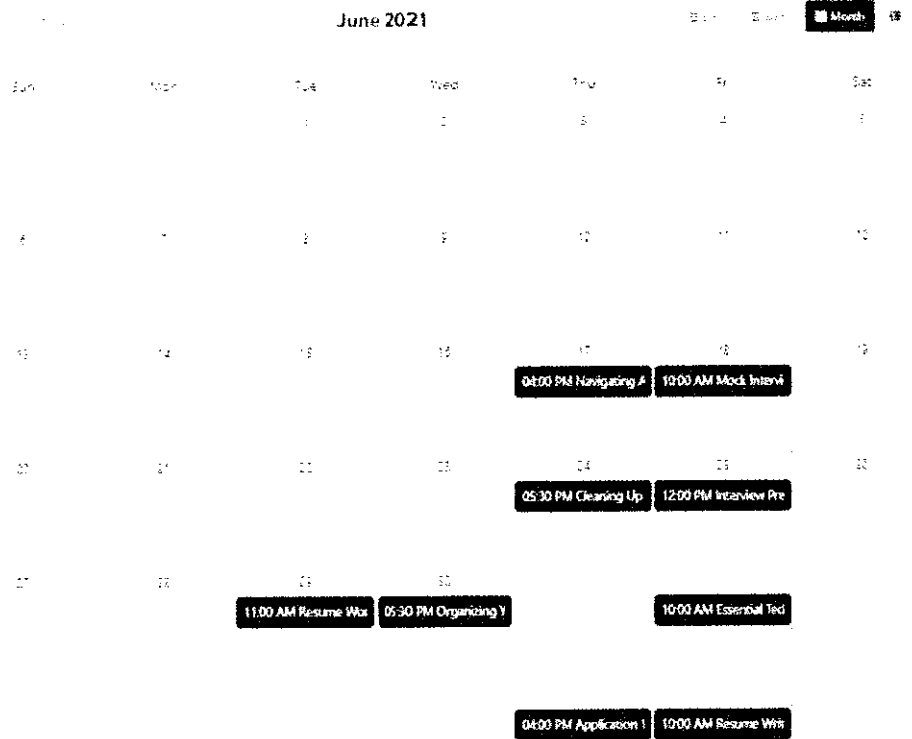
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To register for a workshop, please visit www.careersourcepinellas.com/. Please register 24 hours in advance.



Professional Skills Workshops

Available at NO COST to participants, Career Skills Pinellas professional workshops are designed to help lead you on a path to employment. Workshops are led by certified workshop professionals and cover a variety of topics, including resume writing, interview skills, book review, communication skills and more.



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	Total	1803	1066	1073	993	778	934	1017	839	488				8,991
	Unique Customers	502	292	282	250	205	273	274	230	138				2,446

Non-compliance of CSPIN Bylaws-Article II

Section 2-Use of Funds

SECTION 2 – Use of Funds CareerSource Pinellas shall direct the receipt and expenditure of funds in accordance with the approved local plans and budget, and all applicable Federal, State or Local Laws. This shall be done in ways that will most effectively satisfy the labor demand needs of the residents and business community to enhance the economic well-being of the area.

Ms. Brackney has directed her focus on her image and image of CSP above executing the objectives of the federal workforce programs. Resources utilized to solely increase public image, have taken the place of efforts to enhance service provision, when providing excellent services connecting job seekers to employment would achieve the goal of an improved public presence. During PY 2020-2021, CSP personnel were informed of a new initiative to increase positive google reviews. The goal of the incentive program was to have staff request that the jobseekers/participants utilizing CSP to complete a review for CSP and the team member with the most mentions in the review for a specific period would be awarded an incentive. The current function of CSP focuses on meeting technical requirements of the programs, not the provision

- No DEO representation at CSPIN Board of Directors meetings.

Thank you for your attention to this matter; the community of Pinellas County is relying on you to assist in the return of Workforce Services!

From: Kristopher Lucas
Sent: Friday, October 15, 2021 9:24 AM
To: [REDACTED]
Cc: Shawna Peer
Subject: RE: Position Change

Hi [REDACTED]

We did not create a new position. We are simply moving the management aspect of WIOA to a single coordinator, Caleb. He will work in tandem with you for clarity and vision of proper WIOA execution. This will allow you to focus on a detailed and robust WIOA training plan that will be trained with the entire team. You mentioned last week that you have the training ready and we didn't get a chance to meet. With you being out for a few days we can set a Zoom or teams meeting next week. In the meanwhile, please send over what you have already (or add it to Sharepoint and send a link). I am excited to see what we can do and to get our WIOA case management back on track.

Kindly,

Kristopher D. Lucas, MBA

Director, Business & Talent Development

CareerSource Pinellas

13805 58th St. North, Suite 2-140

Clearwater, FL 33760

klucas@careersourcepinellas.com

Cell: 727-415-4386

Fax: 727-534-4350



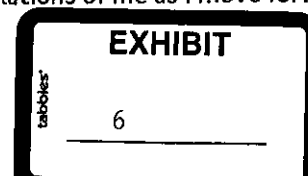
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From: [REDACTED]
Sent: Friday, October 15, 2021 8:39 AM
To: Kristopher Lucas <klucas@careersourcepinellas.com>
Cc: Shawna Peer <speer@careersourcepinellas.com>
Subject: Position Change

Good Morning, Kris.

As I transition into a new role within the agency, I am wondering if there is a job description for the role as I didn't see one and it wasn't posted as an open position. I understand the goal is to have me train all agency staff on proper WIOA implementation, however, I want to make sure that I fully understand all expectations of me as I move forward.



Thank you,

[REDACTED]
Program Coordinator
CareerSource Pinellas
2312 Gulf to Bay Blvd.
Clearwater, FL 33765

[REDACTED]@careersourcepinellas.com

[REDACTED]
Fax: 727-791-5891



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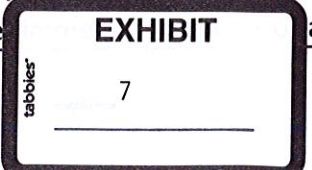
EMPLOYEE DISCIPLINARY ACTION NOTICE

Employee Name: [redacted] Job Title: Coordinator, WIOA Special Projects
Date of Notice: 10/25/2021 Supervisor: Kris Lucas, Director
Office Location: Gulf to Bay Director: Kris Lucas, Director

This corrective action notice is for (check one of the following):
[] Verbal Warning
[X] Written Warning – Transparency, Accountability and Integrity
[] Suspension/Written Record
[] Employee Termination Recommendation
[] Date(s) of previous disciplinary record (if any):

WHY IS THIS ACTION BEING TAKEN?

Specific performance that is not acceptable:
On October 1, 2021, [redacted] contacted the Department of Economic Opportunity (DEO) without first discussing with her immediate supervisor or the Director. Kris Lucas, the Director, specifically directed his Team not to contact the DEO without his knowledge, unless the outreach is routine and customary in accordance with their job duties (timecard approvals for state staff, for example). This instruction was verbalized to the Team on September 6, 2021, and communicated in writing on September 9, 2021, therefore [redacted] was aware that there was a process for communicating with DEO. [redacted] was also aware of the values of this organization, specifically related to transparency, integrity, and accountability. She is aware that Ms. Shawna Peer was her immediate supervisor, and Kris Lucas is the Director.
The concern with this communication to DEO is [redacted] was requesting a change to enrollment status of a cohort of enrollees based on what she perceived was an error in data entry.
In the email to DEO dated October 1, 2021, [redacted] writes, "Thank you again for the information you provided while we were in Orlando; It was very helpful. However, now I have another set of issues that I need assistance with and am not sure who to contact. LWDB 14 has been working with PERC for the Career Pathways softskills grant for over a year. Last program year, we also were brought into a partnership with Florida HIRES re-entry program. The programs are almost identical, just funded by different grants; one we facilitate, one we are a partner to. Due to internal obstacles, participants from the HIRES program were erroneously entered into EF as Career Pathways and I am seeking guidance on how to remedy the error in Data Entry." She also goes on to state, "In efforts to ensure we handle the errors above properly, I am seeking your assistance. If you are not the correct contact, could you provide information on who would be able to assist. As always, thank you for your time and I look forward to working to clear up these issues."
This type of request to change data entry requires DEO approval. Prior to making the request, [redacted] should have at least presented the concern to her Supervisor and/or Director. She failed to include them in discussion regarding the "erroneously entered data" and attempted to circumvent her directed line of supervision to "fix" the problem without their knowledge. By not including her [redacted] and/or



Director in the discussion related to the situation, she failed to approach resolution to the situation with transparency, integrity, and accountability.

When Mr. Lucas inquired with [REDACTED] about when she was planning on notifying him that she contacted the DEO, she advised that it was never her intention to let him know. [REDACTED] has been with the organization for many years, and is well aware of expectations surrounding following responsibility to conduct work with transparency, integrity, and accountability.

Additionally, reaching out to DEO was counterproductive because the eligible individuals were enrolled in WIOA correctly.

Policy or guideline Employee is not following:

If an Employee fails to observe reasonable rules of conduct, including failure or refusal to follow reasonable work instruction from a supervisor on behalf of the organization, disciplinary action will be taken. Transparency, integrity, and accountability are cornerstones of this organization's values. It is a serious violation of CareerSource Pinellas' code of conduct.

Prior discussion(s) held with Employee regarding this issue (if none, so state):

[REDACTED] has been involved in the discussions regarding the organizations mission, vision, and values. She is aware that we bring the mission to life through our actions and behaviors each and every day.

If it is a performance issue, describe the trainings that have been provided and other assistance given the Employee that should have provided a solid foundation for meeting the performance standards.

[REDACTED] received the direction regarding the need to follow the values of this organization. She is aware that Ms. Shawna Peer was her immediate supervisor, and Kris Lucas is the Director of Programs. She failed to include them in discussion regarding the "erroneously entered data" and attempted to circumvent her directed line of supervision to "fix" the problem without their knowledge. [REDACTED] has been with the organization for many years, and is well aware of expectations surrounding following responsibility to conduct work with transparency, integrity, and accountability.

CORRECTIVE ACTION REQUIRED

This conduct is unacceptable and will not be tolerated going forward. Subsequent instances of failure or refusal to follow reasonable work instruction or perform tasks assigned by the Company will result in further disciplinary action, up to an including termination of employment.

EMPLOYEE COMMENTS:

Your signature below simply acknowledges that the content in this disciplinary action notice has been presented to you, and does not necessarily imply consent. By signing below, you confirm that you were given a copy of this disciplinary action notice for your records.

Employee Signature

Date Signed

Supervisor / Director Signature

Date Signed

Witness Signature (as needed)

Date Signed



EMPLOYEE DISCIPLINARY ACTION NOTICE

Employee Name: _____ Job Title: Coordinator, WIOA Special Projects
Date of Notice: 10/25/2021 Supervisor: Kris Lucas, Director
Office Location: Gulf to Bay Director: Kris Lucas, Director

This corrective action notice is for (check one of the following):

- Verbal Warning
- Written Warning – **Not Following a Directive/Insubordination**
- Suspension/Written Record
- Employee Termination Recommendation
- Date(s) of previous disciplinary record (if any): _____

WHY IS THIS ACTION BEING TAKEN?

Specific performance that is not acceptable:

On October 1, 2021, _____ contacted the Department of Economic Opportunity (DEO) without first discussing with her immediate supervisor. Kris Lucas specifically directed his Team not to contact the DEO without his knowledge, unless the outreach is routine and customary in accordance with their job duties (timecard approvals for state staff, for example). This instruction was verbalized to the Team on September 6, 2021, and communicated in writing on September 9, 2021, therefore _____ was fully aware that there was a process for communicating outside of the organization.

The concern with this communication to DEO is _____ was requesting a change to enrollment status of a cohort of enrollees based on what she believed was an error in data entry. This request to change enrollment status requires DEO approval. In the email to DEO dated October 1, 2021, _____ states, "EF functionality and understanding if and how to correct data errors is not an area that I have been overly involved in previously. With the departure of seasoned staff, I am trying to step in and assist and ensure things are done correctly." Prior to making the request, _____ should have presented the concern to her supervisor or director. When Mr. Lucas inquired with _____ about when she was planning on notifying him that she contacted the DEO, she advised that it was never her intention to let him know.

Policy or guideline Employee is not following:

If an Employee fails to observe reasonable rules of conduct, including failure or refusal to follow reasonable work instruction from a supervisor on behalf of the organization, disciplinary action will be taken.

Prior discussion(s) held with Employee regarding this issue (if none, so state):

_____ along with the entire team was provided a directive regarding when/how to communicate with DEO.

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EXHIBIT

8

If it is a performance issue, describe the trainings that have been provided and other assistance given the Employee that should have provided a solid foundation for meeting the performance standards.

██████ received the clear verbal instruction from Mr. Lucas on September 6, 2021, as well as the written instruction on September 9, 2021 in regards to communications to DEO which are not routinely part of an Employee's role. Mr. Lucas' email contained specific instruction, as well as examples for guidance. ██████ was well aware of expectations surrounding following reasonable work instruction.

CORRECTIVE ACTION REQUIRED

This conduct is unacceptable and will not be tolerated going forward. Subsequent instances of failure or refusal to follow reasonable work instruction or perform tasks assigned by the Company will result in further disciplinary action, up to and including termination of employment.

EMPLOYEE COMMENTS:

Your signature below simply acknowledges that the content in this disciplinary action notice has been presented to you, and does not necessarily imply consent. By signing below, you confirm that you were given a copy of this disciplinary action notice for your records.

Employee Signature

Date Signed

Supervisor / Director Signature

Date Signed

Witness Signature (as needed)

Date Signed

November 30, 2021

Barclay Harless
Chairman of Board
CareerSource Pinellas

Re: October 29, 2021 Whistleblower Complaint by Nicholas Karatinos on behalf of current CareerSource Employee¹

BACKGROUND:

On or about October 29, 2021, the Complainant through her counsel sent a forty-one-page document (the “Complaint”) detailing the Complainant’s concerns about CareerSource’s operations and the leadership of Jennifer Brackney (CEO and President). The Complaint’s allegations essentially fall into three (3) distinct categories: (1) an alleged failure to provide an adequate level/scope of services; (2) alleged overreporting of services provided; and (3) alleged retaliatory actions toward the Complainant for her good faith complaints about these issues.

This investigation is being taken under CareerSource’s current Whistle-Blower Policy (found starting on page 54 of the employee handbook). That Policy provides that an individual can report “unlawful, improper or unethical activities or conduct” through prescribed series of channels. Specifically, the individual must report the alleged concerns in writing to the CEO or if the allegation involves the CEO, the Board Chair.

Pursuant to this policy, the Board Chair determines the appropriate investigative action in response to this complaint. Here, the Board Chair decided to have an outside entity conduct an investigation into the allegations. CareerSource retained the undersigned counsel to conduct an independent investigation into the issues raised in the Complaint. This report is the final product of that investigation.

INVESTIGATIVE PROCESS:

Undersigned reviewed the following materials as part of this investigation:

1. Personnel File of the Complainant including recent disciplinary actions (including a post Complaint reprimand);

¹ CareerSource policies require that the Complainant be afforded confidentiality. The Complainant has shared her name in various communications with current and former personnel at CareerSource. However, as this report may be shared in a public meeting of the Board of Directors who may not know her identity and given the public nature of that meeting, her name has been withheld in an abundance of caution. Herein, the individual will be referred to as the Complainant.

2. Various internal emails regarding the discipline at issue;
3. The Complaint and its attachments;
4. The Current Employee Handbook for CareerSource;
5. The prior policy on Whistleblower Complaints – Policy #19-A12 (which is referenced in the Complaint but has been superseded by the current Handbook);
6. Organization Charts for Career Source;
7. The Complainant's Job Description;
8. November 17, 2021, CEO Report by Jennifer Brackney;
9. Additional Materials provided by the Complainant, including Apprentice Lack of Contact Letter, drafts of same and various related emails regarding same;
10. An anonymous letter received on or about January 14, 2020 regarding CareerSource's operations;
11. February 2020 email from Complainant expressing her disagreement with and offense taken by the 2020 anonymous letter;
12. Jennifer Brackney's letter to the BOD (and distributed to employees) responding to the January 2020 anonymous letter and detailing her action plan to respond to various issues and perceptions raised in the letter;
13. Various documents provided by current and/former employees, including writeup responses, written complaints to BOD members about morale and concern that management style was causing unwarranted staff turnover/talent loss.²
14. Emails showing individuals receiving services;
15. Correspondence from Commissioner Rene Flowers dated November 12, 2021.

The following individuals were interviewed as part of the investigation:

1. Complainant
2. CEO Brackney
3. CFO Steven Meier
4. Director of Talent & Business Development, Kristopher Lucas
5. HR Director Jacqueline Heyward
6. Former HR Director Jaclyn Reilly
7. Board Member Michael Jalazo
8. Chairman of the Board Barclay Harless
9. Director of Strategic Initiatives, April Torregiante
10. Three (3) former CareerSource Directors³
11. Lead Jeff Grau

² Because several of the individuals asked not to be identified by name, we have not provided more detailed descriptions of these documents.

³ Two of the three asked not to be identified by name. Therefore, we have not disclosed all three in an abundance of caution.

INITIAL ASSESSMENT OF WITNESS CREDIBILITY AND OTHER ASSUMPTIONS

The Undersigned found all the current and former employees of CareerSource to be credible, forthright, and honest in their opinions. All had a deep passion for the mission and serving others. All have significant experience either in this field or in business.

It is also noted that Complainant has consistently been rated high in her performance evaluations, including the most recent July 2021 evaluation and, until recently, has relatively few coachings or disciplinary actions in her file (for someone of her tenure). She also made several admissions regarding her own conduct and that of the organization which tends to support her good faith belief in her concerns, even if this investigation reaches different conclusions.

It is also obvious that several of the interviewed witnesses have discussed their opinions on CareerSource and this Complaint. Many of the interviewees use the same key words or phrases for the same situation (toxic work place, bullying, etc.), but when pushed have difficulty providing specific examples of the behavior in question (as opposed to generalities or situations that are unique to a single person and that they were not a witness too). This is not improper conduct but it impacts credibility of witness testimony.

We recognize that the time period covered by this Complaint also coincides with the outbreak of COVID. Many organizations in both the private and public sector struggled with their responses to COVID and how to provide goods/services during the pandemic.

Finally, we also recognize that there is an on-going DOL/FBI investigation into various programs run under the prior administration which has not yet concluded.

FINDINGS AND CONCLUSIONS:

I. Alleged Failure to Provide an Adequate Level/Scope of Services

UNSUBSTANTIATED.

We have been unable to find any instances where a law, rule or regulation was violated by CareerSource or CEO Brackney.

Nor did we substantiate any conduct we determined by be “improper” or “unethical” as defined by the policy. “Improper conduct” can include violation of laws, regulations, rules, internal controls, policies and procedures. For the purposes of this investigation, we have interpreted “Improper” to include any continuous pattern of managerial abuses, or wrongful or arbitrary and capricious actions which may have a substantial economic impact on the operations of CareerSource. We are also unable to concluded that CareerSource or CEO Brackney engaged in improper or unethical conduct as defined by the policy. Their actions were not arbitrary, capricious, or wrongful. We did not find any violation of a law, regulation, rule, policy or internal controls.

Complainant acknowledges several points that support this conclusion. This includes that:

- a. it was initially prudent to curtail programs after the DOL/FBI investigation started; and
- b. many organizations misunderstand their obligations under the various programs administered by CareerSource; and
- c. Complainant's February 2020 email praising the organization's efforts.

CEO Brackney acknowledges that CareerSource is not fully pushing programs to the levels they were prior to the DOL/FBI investigation. She is doing this purposely with the intent of waiting for the outcome of that investigation. Individuals could (and here do) disagree on how to manage risk. But, the actual decisions here on this do not rise to the level of being "improper" or unlawful.

The Complainant also takes issue with the pace at which efforts have been made to ramp back up services and programs. In her opinion, it is taking too long and that there are individuals who could use assistance but are not receiving services. This opinion is mirrored by several of the former employee witnesses interviewed above. Several commented that they believed CEO Brackney is too risk adverse and afraid of failing. None of the witnesses believed CEO Brackney or CareerSource had engaged in any violation of law. Rather, they believed CareerSource could be delivering more and was not meeting its mission. They also believed that CareerSource and the CEO were getting too much credit/praise for their actual results and effort. None of which indicates a violation of the CareerSource Whistle-Blower Policy. Indeed, in February of 2020, Complainant was very supportive and complimentary of the efforts taken by the CEO and CareerSource. There is no significant difference in services or reporting from February 2020 until now. CEO Brackney reported that she has decided (due to COVID and DOL/FBI Investigation) to emphasize education and training programs provided by other institutions whose cost was reimbursed by one of the programs.

Again, none of these decisions is a violation of the law or evidence of conduct we would consider improper or unethical.

This conclusion is further bolstered by the impact of COVID during the relevant time period. While several of the individuals believed CareerSource should be providing more in person services and questioned several of the decisions made by CareerSource regarding how it provides services in light of COVID, this is not a violation of the law, rule or procedure. It merely states a difference in opinion, risk tolerance and speculation on the number of recipients that would have been willing to participate in "in person" services.

II. Alleged Overreporting of Services Provided

UNSUBSTANTIATED.

Several allegations raise concerns with the reporting of who received services or the belief that the numbers while correct, give the incorrect impression to the BOD of the success of CareerSource programs.

As mentioned above, Complainant admits that reporting enrollment process is confusing, and many organizations across the United States do it incorrectly. She also admits that the methodology

used has been in place for some time. The question is “did the recipient receive services that qualified under the program in question?” If yes, they can be enrolled in the program. Unfortunately, this question is recipient specific as a recipient of services may come in under one program but qualify and receive services under another. We were unable to find any examples where someone was intentionally reported in the wrong program.

This opinion was supported by the interviews of former Directors.

Further, CareerSource admits several of the programs currently have low participation rates. They attribute this to the impacts of COVID, the DOL/FBI investigation and the conscious decision to focus on certain programs over others pending the DOL/FBI investigation. None of this is evidence of a violation of law/rule/regulation, or unethical/improper conduct.

III. Alleged Retaliatory Actions Toward the Complainant for her Good Faith Complaints about the Issues Described Above.

UNSUBSTANTIATED.

To establish a claim for retaliation, the protected conduct must be the cause of any adverse actions toward the Complainant. This is sometimes explained as “but for” her complaint she would not have received the negative treatment (here discipline or staffing change). An essential part of such a claim is showing that the decision maker was aware of the Complainant’s protected conduct before the alleged adverse actions were taken.

Complainant alleges she reported her concerns to the then-Director of Human Resources Jaclyn Riley in March of 2021. As evidence of this, Complainant provides a note from Ms. Riley thanking her for her input. Ms. Riley (who is no longer employed by CareerSource) denies this allegation. Rather, she claims the note referenced was thanking Complainant for allowing Ms. Riley to “ride along” with her and observe her job. Ms. Riley was impressed with Complainant’s knowledge and use of various computer programs that enabled her to do her job more effectively. Ms. Riley further testifies that Complainant did not raise any concerns about CareerSource or Ms. Brackney. Because Ms. Riley is no longer employed by CareerSource and, given other information she provided which is critical of the organization and the CEO (below), we are crediting her version of events over Complainant.

Complainant also claims she reported her concerns to Governor DeSantis’s office and various elected officials. When they did not respond, she sent her complaints to DEO official Casey Penn and spoke with BOD Chair Barclay on October 12, 2021. **However, the policy provides that an individual with a whistleblower complaint must make such complaint in writing to CEO or Chairman of Board.** Therefore, none of the above complaints satisfy the requirements of the policy.

On October 29, 2021, Complainant (through her counsel) sent a copy of the Complaint to several individuals on the BOD of CareerSource, including the Chairman. This Complaint does comply with the provisions of the policy and triggered this investigation.

Looking at each of the actions complained about toward Complainant, we are unable to conclude they were motivated by her complaints referenced above.

1. On October 13, Complainant's job responsibilities were changed.

Prior to mid-October, two employees reported through Complainant in the organizational chart. Importantly, Complainant did not discipline, hire or discharge these individuals as part of her job. In mid-October, Kris Lucas consolidated all the WIOA employees under one coordinator (Caleb). Mr. Lucas denies knowing about any whistleblower complaints made by of his team at the time of the decision. Further, Complainant did not lose any pay due to that change.

Complainant advises that she did not have a role in hiring, disciplining, or discharging these two employees that reported through her previously. She did provide input on their evaluations. Therefore, it does not appear that she actively managed these employees.

Given Mr. Lucas's denial and the timeline discussed above, we are unable to conclude that the decision was influenced by any complaints made by Complainant. We recognize that Complainant may speculate that one of the individuals/organizations she complained through contacted CareerSource and alerted them to her Complaint. However, even if that were to have occurred, the decision to streamline the organizational assignments does not appear to be "adverse" to Complainant. She lost no pay; she did not actively supervise the individuals previously; and she still works with the WIOA team. Her job description does not include direct supervisory duties as an essential function of the job. Mr. Lucas denies knowing about her Complaint at the time. Further, the re-organizational decision is a plausible business decision on how to provide services.

More importantly, the date of her formal Complaint under the policy was October 29, 2021 and this discipline re-dates that event.

2. October 25 Warnings/Reprimands

On October 25, Complainant received two Written Warnings (discipline) for the same conduct.⁴ The reprimand suffers from the same notice and timing issues discussed above. Therefore, we are unable to conclude they were motivated by Complainant's protected conduct.

Ignoring the timing and notice issues, we are unable to substantiate a claim of retaliation. While Mr. Lucas has a lot of managerial experience, he is relatively new to the program administered by CareerSource. Therefore, to expand his knowledge and to ensure that communications with DEO are occurring in an appropriate and consistent manner, he asked that he be consulted prior to

⁴ CareerSource has a past practice of issuing multiple disciplinary documents for the same conduct. While this practice is not common amongst organizations, it is not by itself unlawful. It may create perception issues of "overkill" and impact opinions on the work environment (discussed below).

contacting DEO on non-routine matters. He made this directive verbally in early September 2021.⁵ Mr. Lucas also believes he made the request in writing via email on September 9, 2021.⁶

On October 1, 2021, Complainant contacted DEO with non-routine questions about two different programs. Further, the email contained side commentary about CareerSource's operations including references to "internal obstacles," "another set of issues," "error in data entry" and "departure of seasoned staff." Complainant believed several participants had been registered under the wrong program and requested that they be removed. She did not let her manager or Mr. Lucas know of her concerns prior to contacting DEO. Complainant further alleges that the participants could not be in the program because there was only two days left in the grant when they were registered and never received services.

CareerSource maintains that the participants were properly registered under the various programs which Complainant admits could be proper if the participants received services. This process was further confirmed by some of the former Directors that were interviewed. CareerSource personnel have demonstrated that the individuals did receive services (training) over multiple days (including testimony of Jeff Grau). Further, the grant allows individuals to be registered during the grant period even if the services are provided after the grant period ends. What an organization cannot do is retroactively put them into the grant after the services are provided. This did not occur.

We do not believe the directive to send non-routine questions through management prior to sending externally to be unreasonable. Further, we understand why any organization would want to avoid unnecessary commentary about services to key partners. Therefore, the reaction to the method and tone of Complainant's email also does not appear inappropriate.

The purpose of disciplinary action is not to punish but to correct behavior. The written warnings appear to be designed with correcting this behavior and also tailored to the level of the offense (no pay was lost and they were "warnings.).

Mr. Lucas admits that Complainant's efforts did prevent CareerSource from improperly submitting for reimbursement certain educational activities. But he also believes she could have achieved the same result without violating his directives. Further, Complainant is incorrect in that the participants were entered into the proper program. He is thankful for Complainant's focus on these participants, without which an error might have occurred. But, Complainant still ignored his direction on the handling of questions, openly admitted she did not intend to tell him it occurred even after the fact and made the unnecessary comments outlined above. [Complainant acknowledges that her commentary might have caused or escalated the reaction to it].

⁵ The reprimand notes the date of this verbal instruction as September 6, 2021. This date is incorrect as that date is Labor Day and the meeting could not have occurred on Labor Day.

⁶ We have reviewed the email and do not believe this instruction is as clear as Mr. Lucas believes. In fact, this email could be read as an instruction not to distract April T. with unnecessary questions.

While reasonable people may differ regarding whether the situation warranted two (2) sets of discipline given the confusing nature of the written direction and the benefit obtained from spotting the tuition reimbursement issue, it still does not appear to rise to the level of retaliation.

3. November 10, 2021 Reprimand for Sending CareerSource Documents to Personal Computer

This reprimand occurred after receipt of the formal Complaint. Therefore, it does not suffer from the same timing issues of the other personnel actions. However, CareerSource policies require that the Complainant's identity be kept confidential. Consistent with that policy, the Chairman of the Board did not disclose the Complainant's identity to the CEO. The Complaint represents that it was sent to CEO Brackney. However, the email address listed is not correct. In short, we have found no evidence that CEO Brackney (or Kris Lucas) knew who the Complainant was on November 10, 2021.

Even if we assume, for the purposes of this investigation, that CareerSource leadership was aware of (or suspected) who the Complainant is at the time of the reprimand, the retaliation claim still fails. Complainant sent over 30 CareerSource documents to her personal email address. Some of these documents included participant information. CareerSource policies prohibit downloading or storing CareerSource documents in personal computer or devices, without written approval by management to do so. The rule appears reasonable and is a common policy in both Public and Private organizations.

Complainant response to the reprimand is that it was her regular past practice to send documents to her personal computer so she could work on them remotely. According to the Complainant she could not access CareerSource documents remotely until December of 2020. Prior to December 2020, this was her work around. Complainant now has been issued a CareerSource Laptop and can access materials remotely without violating the policy. She has no explanation, therefore, why she needed to send 30+ documents to her personal email in October and November 2021. Instead, she raises two excuses for her conduct. First, given her past practice, she simply was not aware that it was a violation of policy. Second, she is concerned that other employees engage in this practice and have not been disciplined or coached. She believes she has been singled out due to her protected conduct.

Being unaware of the rule or procedure is not a valid excuse to being warned about a violation of such rule or procedure. Indeed, the Whistle-blower Policy includes "unintentional violations" of policy as an example of potential improper conduct. Further, as mentioned above, one of the goals of discipline is to change behavior and to document that the employee has been made aware that the conduct is not proper. This appears to have been achieved here.

Disparate application of valid rules can be improperly retaliatory. In other words, "but for" her protected behavior, would Complainant have been disciplined? We conclude that the most likely answer is she would have been disciplined regardless of her various complaints (formal or otherwise).

Kris Lucas reports that he was reviewing the number and use of various generic email accounts⁷ in the CareerSource system. As part of this review, most of the accounts had little to no activity. But in one he found that Complainant had been forwarding documents through it to her personal account. [We also believe that Complainant's use of the generic accounts demonstrates her understanding that what she was doing may not have been compliant with CareerSource policies.] Mr. Lucas was also concerned with the volume of documents being sent. He is not aware of any other employees under his chain of command who have sent this number of documents or attempted to do so through the generic accounts. Mr. Lucas met with Human Resources about the situation and the decision was made that the appropriate response was a written counseling.

Given the way the documents were forwarded, the size/number of documents forwarded and the fact that some of the documents contain participant information, we believe a counseling/warning was warranted. Further, Mr. Lucas is not the focus of the Complaint. All individuals interviewed were complimentary of Mr. Lucas (other than his lack of industry knowledge) and did not raise any concerns of improper animus. Therefore, we credit his denial of animus and his reaction to this situation. CEO Brackney was informed of the discipline after the decision was made by HR and Mr. Lucas to issue it. Therefore, we are unable to substantiate that this discipline was caused or issued in retaliation for the Complainant's protected activities.

IV. Perceptions of Toxic or Hostile Work Environment

A "toxic" work environment does not violate any law, rule or regulation; nor does it appear to rise to the level of "improper conduct" envisioned under the Whistleblower policy. However, the investigation process did reveal a significant perception that such an environment exists and a concern that raising criticism of the organization or its leadership could lead to adverse consequences.

Two of the former directors did not want to be identified by name for fear of retaliation. Several of the current employees also did not want to be identified by name regarding some of the information they provided on the work environment. The former HR Director Riley reported that she decided to leave to obtain worklife balance found in consulting. However, the decision to seek that worklife balance was caused by a workplace altercation with the CEO where she felt she was not treated with dignity and respect (she had been agonizing over whether to make the change until that altercation occurred). Importantly, Ms. Riley was extremely complimentary of the CEO's knowledge base and decision process. Yet, it is evident that the "respect" issue raised by Ms. Riley mirrored many of the impressions of other current and former personnel. It is also apparent that the CEO may share her opinions (too frankly) on the performance of certain employees with individuals on her leadership team. What the CEO may not realize is that many of her leadership team are long time friends of these employees and do not appreciate hearing her unveiled criticisms. [We note the CEO denies this behavior, but similar stories were relayed from too many sources to be discounted. Therefore, the CEO may not recognize she engages in this behavior from time to time.] Further, this behavior caused many of the interviewees to speculate that if the CEO did this to their friends and colleagues, she would make negative comments about them to their peers – even if they had no

⁷ These are accounts not attributable to an individual.

evidence this occurred. This perception may impact the view of the workforce of the work environment and workplace morale.

Every organization has its own culture and what norms of governance is acceptable or appropriate conduct. We suspect that CareerSource's culture may lean away from conflict and open criticism. The fact that a significant majority of those interviewed believe they have not always been treated with dignity and respect while employed is an issue that CareerSource should be aware of and may want to take steps to address. Unwarranted or unnecessary turnover, employee burnout and poor morale can have a negative impact on performance of any organization. CareerSource and CEO Brackney took pro-active steps to respond to the first anonymous complaint letter, but have not maintained those efforts due to COVID. While we understand the impact of COVID, the morale issues are not currently being addressed. We suggest CareerSource review these concerns and develop a response to the perception issues. Moreover, these perceptions over treatment are likely driving some of the opinions on the CEO's overall performance discussed above.

CONCLUSION/SUMMARY:

For the reasons discussed herein, we've reached the following conclusions:

- Complainant made a Complaint under CareerSource's Whistle-Blower policy on October 29, 2021.
- Within 20 days of the receipt of this Complaint, an interview of Complainant was scheduled and conducted.
- We are unable to substantiate any violation of the law, rule, regulation.
- We are unable to substantiate that the CEO engaged in "improper or unethical conduct" under CareerSource's Whistle-Blower policy.
- We are unable to substantiate that the Complainant was retaliated against due to her Complaint. Therefore, we affirm the disciplinary and other actions taken toward the Complainant.