



**September 13, 2023 - 11:45 A.M.**

Hybrid Meeting – EpiCenter

13805 58<sup>th</sup> St. N.

Room 1-451 & 1-453

Clearwater, FL 33760

**Zoom**

\*Join via Zoom – Meeting ID: 338 034 9468

[Zoom Link](#)

\*Dial In via Phone – Meeting ID: 338 034 9468

Phone: +1 646-558-8656

## **Board of Directors**

### **Agenda**

- I. Welcome and Introductions** ..... Scott Thomas, Chair
- II. Public Comment**  
*Members of the public may raise their virtual hand during the Public Comment portion of the meeting. Members of the public who do so will be acknowledged by the Chair and provided up to three minutes to make public comment.*
- III. Roll Call**
- IV. Chair’s Report**
- V. CEO Report**
- VI. General Counsel Update – Gray|Robinson**..... Page 1
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Collaborate.

Innovate.

Lead.

careersourcepinellas.com

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## IX. Open Discussion

## X. Adjournment

**Audit Committee – October 25, 2023 (11:00 am – 12:00 pm)**  
**Compensation Committee – October 5, 2023 (11:00 am – 12:00 pm)**  
**Finance Committee – October 25, 2023 (10:00 am - 11:00 am)**  
**Workforce Solutions Committee – October 19, 2023 (2:30 pm - 3:30 pm)**  
**One-Stop Committee – October 12, 2023 (9:00 am - 10:00 am)**  
**Next Board of Directors Meeting – November 15, 2023**

*\*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](mailto:admin@careersourcepinellas.com) at least two business days in advance of the meeting.*



**Senator Nick DiCeglie**

Hope Villages of America



**Nikisha Lezama**

CoreRx



**Benjamin Friedman**

Duke Energy



**Russell Williams**

Power Design



## MEMORANDUM

**TO:** CareerSource Pinellas Board of Directors  
**FROM:** Stephanie Marchman, CareerSource Pinellas General Counsel  
**DATE:** September 1, 2023  
**SUBJECT:** Legal Services Summary and Litigation Report

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The following is a summary of legal services provided to CareerSource Pinellas since the General Counsel issued her last Legal Services Summary and Litigation Report to the Board of Directors at its meeting on July 12, 2023:

- Reviewed the LWBD 14 Programmatic and Financial Monitoring Report and to ensure CareerSource Pinellas's contracts were in compliance.
- Reviewed agreements for form and legality, including the Sail Future Subaward Agreement.
- Provided legal counsel regarding the Compensation Committee Meeting Agenda Packet, including recommended revisions as to the employee handbook and implementation of retention bonuses.
- Reviewed Board of Directors, One-Stop Committee, Workforce Solutions Committee, and Finance & Audit Committee Meeting Agenda Packets as to form and legality; attended Board of Directors meeting.
- Attended meetings with Pinellas and Hillsborough representatives regarding consolidation implementation and reviewed proposed interlocal agreement and consolidation flow chart, providing legal advice on establishing a new Consortium, board, and by-laws.
- Coordinated with outside counsel and CareerSource Pinellas staff regarding discovery responses and mediation in the pending litigation below.
- Reviewed by-laws to determine if additional revisions are needed due to prior vote of Board of County Commissioners.
- Responded to sunshine law questions.

Pending litigation report:

*Worknet Pinellas, Inc., Tampa Bay Workforce Alliance, Inc., v. Federal Insurance Company, Westchester Fire Insurance Company*, currently pending in the United States District Court, Middle District of Florida, Case Number 8:23-cv-00602-SDM-TGW.



## **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 July 12, 2023, Board of Directors meeting have been prepared and are enclosed.

### **RECOMMENDATION**

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

**CareerSource Pinellas  
Board of Directors Minutes**

**Date:** Wednesday, July 12, 2023, at 11:45 am.

**Location:** Hybrid meeting – Zoom/EpiCenter, 13805 58<sup>th</sup> St. N., Rooms 1 - 451 & 1 - 453, Clearwater, FL 33760

**Call to Order**

Chair, Scott Thomas, called the meeting to order at 11:45 a.m. There was a quorum present with the following board members in attendance.

**Board Members in Attendance**

Scott Thomas (In person), Barclay Harless (Zoom - 11:49am), Belinthia Berry (Zoom), Jack Geller (Zoom), John Howell (In person), Kenneth Williams (Zoom), Mark Hunt (Zoom), Michael Jalazo (In person), Shawn McDonnell (Zoom), David Fetkenher (Zoom – 12:02pm), Dr. Rebecca Sarlo (Zoom – 11:58am), Glenn Willocks (Zoom), Esther Matthews (Zoom), Kevin Knutson (In person), Larry Morgan (In person), Candida Duff (Zoom), Celeste Fernandez (Zoom), Dawn Peters (In person)

**Board Members Not in Attendance**

Commissioner René Flowers, Elizabeth Siplin, Zachary White, Bart Diebold, Zac Holland, Ivonne Alvarez, Patricia Sawyer

**Board Counsel**

Stephanie Marchman (Zoom)

**Staff in Attendance (all attended in person)**

Steven Meier, Jay Burkey, Michelle Moeller, Leah Geis, David Zirilli, Jason Druding, Lysandra Montijo, Raymond Westergard, Juan Toribio

**Guests in Attendance**

Danielle Weitlauf – Tucker Hall (In person)  
Austin T. (Zoom)  
Mary jo Schmick (Zoom)  
Daniel Harper – DEO/Department of Commerce (Zoom)  
Yvette McCully – DEO/Department of Commerce (Zoom)  
Shawn Brown – DEO/Department of Commerce (Zoom)

**Public Comments**

There were no public comments.

**CEO Report**

Steve Meier gave a report of activities since the last Board meeting.

**General Counsel Update – Gray|Robinson**

Stephanie Marchman, legal counsel from Gray|Robinson, gave General Counsel update. The memo was included in the packet.

**ACTION Item 1 – Approval of the Minutes**

The minutes of the May 17, 2023, Board of Directors meeting were presented for approval.

**RECOMMENDATION**

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

**Discussion:** None

Motion:	Jack Geller
Second:	Mark Hunt

*The minutes were approved as presented. This motion carried unanimously.*

## **ACTION Item 2 – CEO Contract**

### **BACKGROUND**

On May 17, 2023, the CareerSource Pinellas Board of Directors (“Board”) approved Steven Meier as the Chief Executive Officer (“CEO”) of CareerSource Pinellas, subject to the approval of the Pinellas County Board of County Commissioners. Subsequently, the Pinellas County Board of County Commissioners approved Mr. Meier’s appointment as CEO, in accordance with the organization’s by-laws, at its June 13, 2023, meeting. The Board additionally recommended and approved that an employment contract be negotiated with Mr. Meier consistent with past CEO contracts. Mr. Scott Thomas, Board Chair, and Ms. Stephanie Marchman, Board General Counsel, negotiated the contract with Mr. Meier, subject to the approval of the Board.

The proposed contract contains the following clauses:

1. Compensates Mr. Meier a salary of \$175,000 for a three-year term. Mr. Meier’s salary was approved at the March 15, 2023, Board meeting retroactive to January 1, 2023.
2. Provides Mr. Meier twenty (20) weeks of severance pay if Mr. Meier’s employment is terminated prior to the expiration of the contract term by Mr. Meier for “good reason” or by CareerSource Pinellas for a reason other than “cause.” However, Mr. Meier will not receive severance pay if within 90 days of his termination date he becomes employed as an executive by an organization which takes over the majority of operations or functions of CareerSource Pinellas.
3. But for minor changes to comply with the DEO Agreement and law, all other contract provisions are consistent with previous CEO contracts.

The proposed contract was included in the packet.

### **RECOMMENDATION**

Approve the CEO employment contract for Steven Meier for the period of July 1, 2023, through June 30, 2026.

### **Discussion:** None

First motion was to approve the contract itself.

Motion:	Jack Geller
Second:	Michael Jalazo

There was a second motion made to confirm that the contract would take effect, retroactively, on July 1<sup>st</sup>, for a three year term.

Motion:	Michael Jalazo
Second:	Mark Hunt

*The Board of Directors made a motion to approve the CEO employment contract for Steven Meier for the period of July 1, 2023, through June 30, 2026. The motion carried unanimously.*

## **ACTION Item 3 – One-Stop Operator Contract**

Under The Workforce Innovation and Opportunity Act (WIOA), one-stop operators are required to be selected through a competitive process. As detailed in TEGL 15-16, local boards must reissue a competitive operator selection process at least every four years under WIOA. Competition is intended to promote the efficiency and effectiveness

of one-stop operators by providing a mechanism for local boards to regularly examine performance and costs against original expectations.

The Board approved contracting with The Kaiser Group (DE), LLC, dba Dynamic Workforce Solutions, for a one-year term commencing July 1, 2022, with the option of up to three one-year renewals. The contract for 2022-2023 was for \$45,000. The renewal for the period July 1, 2023, through June 30, 2024, is \$52,000. The \$7,000 increase in the budget allows for 3% salary increase for the Customer Advocate, a small increase in time allocated for the Director of One-Stop Services from 15% to 17% and slight increase in travel costs and supplies. CareerSource Pinellas policy requires all contracts in excess of \$50,000 to be approved by the Board.

#### **RECOMMENDATION**

Approval of the One-Stop Operator renewal contract for The Kaiser Group (DE), LLC, dba Dynamic Workforce Solutions, for a one-year term commencing July 1, 2023, for \$52,000.

**Discussion:** None

Motion:	Mark Hunt
Second:	Michael Jalazo

*The Board of Directors made a motion for approval of the One-Stop Operator renewal contract for The Kaiser Group (DE), LLC, dba Dynamic Workforce Solutions, for a one-year term commencing July 1, 2023, for \$52,000. The motion carried unanimously.*

#### **ACTION Item 4 – Regional Targeted Occupation List**

The Department of Economic Opportunity's (DEO) Bureau of Labor Market Statistics (LMS) published the 2023-2024 Statewide Demand Occupational Lists on the Department's website. The Statewide Demand Occupations list identifies the labor market needs of Florida's business community and encourages job training based on those needs, with emphasis on jobs that are both in high demand and high skill/high wage and is used as a baseline for establishing the local Targeted Occupations List (TOL). The Local Workforce Development Boards (LWDBs) develop and use their TOLs to identify occupations for which eligible adults and dislocated workers may receive training assistance under the Workforce Innovation and Opportunity Act (WIOA).

A TOL must be updated when occupations are deleted or added. Each LWDB must update and publish the updated TOL to its website and submit a link to DEO by June 30, 2023.

Staff reviewed the new Regional Demand Targeted Occupations List (TOL) for Pinellas County published by the Labor Market Unit with DEO, analyzing the changes from the 2022-2023 TOL previously approved by the board in June 2022.

Lists of potential additions and deletions were drafted with accompanying Labor Market Information to request review and approval to finalize the 2022-2023 TOL.

In accordance with the REACH Act, CareerSource Pinellas will begin working with CareerSource Tampa Bay on regional approaches prior to the impending consolidation. The accompanying list combines the RTOLs of both regions to create a regional occupation list.

\*The list was included in the packet.

#### **RECOMMENDATION**

Approval to adopt the combined list as the 2023-2024 Regional Demand Occupation List for CareerSource Pinellas.

**Discussion:** None

Motion:	Mark Hunt
Second:	Michael Jalazo

*The Board of Directors made a motion for approval to adopt the combined list as the 2023 - 2024 Regional Demand Occupation List for CareerSource Pinellas. The motion carried unanimously.*

#### **ACTION Item 5 – Eligible Training Provider List**

CareerSource Pinellas enters into individual training provider agreements with each approved Training provider. Training providers are also regularly required to:

- Provide most recent Florida Education & Training Placement Information Program (FETPIP) Reports to include: enrollment, completion, retention, employment rates of students.
- Provide Training Provider Renewal Application.
- Provide Program Cost details (tuition, books, supplies and testing fees) and a copy of current catalog and schedule or website link with required information.
- Provide a copy of a valid license from the Commission for Independent Education (CIE).
- Remain in compliance with performance, financial and other mandated requirements.

In consideration of the consolidation of CareerSource Pinellas with CareerSource Tampa Bay, the two organizations will begin working together on regional approaches for some processes prior to actual date of consolidation. The accompanying list combines the Eligible Training Provider List (ETPL) of both regions to create one regional approved training provider list. The criteria to approve training providers in Hillsborough and Pinellas is very similar.

CareerSource Tampa Bay Executive Committee approved this recommendation on June 15, 2023.

\*The list was included in the packet.

#### **RECOMMENDATION**

Approval to adopt the combined Regional Eligible Training Provider List for CareerSource Pinellas.

**Discussion:** None

Motion:	Mark Hunt
Second:	Belinthia Berry

*The Board of Directors made a motion for approval to adopt the combined Regional Eligible Training Provider List for CareerSource Pinellas. The motion carried unanimously.*

#### **Action Item 6 – PWE/OJT Outside of Pinellas County**

Current Paid Work Experience (PWE) and On-the-Job Training (OJT) Policies and Procedures require the business or work-based learning (WBL) partner to have a physical presence in Pinellas County.

We are requesting the approval to change the policies to reflect the ability to contract with employers and WBL partners in other counties when it will be of benefit to the participant.

In addition to career and geographic value for an individual, this change will be especially beneficial to take advantage of apprenticeship opportunities in surrounding counties.

CareerSource Tampa Bay's policies do not limit employers to Hillsborough county.

#### **RECOMMENDATION**

Approval of the change in CareerSource Policy to allow for PWE/OJT opportunities with employers located outside Pinellas County.

**Discussion:** None

Motion:	Jack Geller
Second:	Dr. Rebecca Sarlo

*The Board of Directors made a motion for approval of the change in CareerSource Policy to allow for PWE/OJT opportunities with employers located outside Pinellas County. The motion carried unanimously.*

#### **Action Item 7 – New Training Provider – Genuine Healthcare**

Genuine Healthcare Institute, LLC is seeking initial provider approval. They have a provisional license from the Commission for Independent Education.

- Years in operation: 4 years in business, nearly 2 years in operation
- Total enrollments for 2022-2023: 38
- Nursing Assistant and Home Health Aide are on the CareerSource Tampa Bay Regional Targeted Occupation List
- Prior positive CRA Grant partnership with St. Pete Works!

#### **RECOMMENDATION**

Approval to add Genuine Healthcare as an eligible training provider.

**Discussion:** None

Motion:	Jack Geller
Second:	Belinthia Berry

*The Board of Directors made a motion for approval to add Genuine Healthcare as an eligible training provider. The motion carried unanimously.*

\*DEO (Now known as the Department of Commerce) conducted our required annual performance presentation via Zoom.

#### **INFORMATION ITEM 1 – REACH Act Realignment Update**

Steven Meier gave an update on the transition plan/status for the REACH Act realignment with CareerSource Tampa Bay.

#### **INFORMATION ITEM 2 – Work-Based Learning Providers through 4.30.2023**

A Work-based learning and OJT training spending report for July 1, 2022 – April 30, 2023 was included in the packet for review.

#### **INFORMATION ITEM 3 – Training Provider Spending through 4.30.2023**

A training provider spending report for July 1, 2022 – April 30, 2023 was included in the packet for review.

#### **INFORMATION ITEM 4 – Workforce Solutions Goals Update**

Director of Business Services, Jason Druding, gave an update on Workforce Solutions goals.

#### **INFORMATION ITEM 5 – Q3 WIOA Primary Indicators**

The WIOA primary indicators were included in the packet for review.

#### **INFORMATION ITEM 6 – May 31, 2023 Financial Statements**

Financial statements were included in the packet for review.



### **INFORMATION ITEM 7 – PY'2023 – 2024 Committee Assignments**

A list of the current committee assignments was included in the packet for informational purposes.

### **INFORMATION ITEM 8 – 2023 Executive Compensation**

The executive compensation form for 2022 – 2023 that is required to be posted online per Florida Statutes 445.007 (13) and Executive Order 20 – 44, was completed, certified and submitted to DEO and posted to the CareerSource Pinellas website (the due date was July 30, 2023). The certified form was included in the packet for the Boards reference.

**Other Administrative Matters** – There were no other administrative matters.

**Adjournment** – Scott Thomas (board chair) asked for a motion to adjourn. Esther Matthews made a motion to adjourn, and Scott Thomas adjourned the meeting at 12:57pm.



## **ACTION ITEM 2**

### **Annual 401(k) Plan Audit**

The Board of Directors elected to have an annual audit of WorkNet Pinellas, Inc. 401k Plan performed by an Independent CPA firm. The Audit Committee approved Thomas Howell Ferguson P.A. to perform an ERISA Section 103 (a)(3)(c) audit (previously “limited scope audit”) of the 2022 financial statements at its February 22, 2023, meeting and the Board of Directors followed up with their approval at the March 15, 2023, meeting.

Management, having determined it is permissible in the circumstances, has elected to have the audits of the Plan's financial statements performed in accordance with ERISA Section 103(a)(3)(C) pursuant to 29 CFR 2520.103-8 of the Department of Labor's (DOL) Rules and Regulations for Reporting and Disclosure under ERISA. As permitted by ERISA Section 103(a)(3)(C), the audits need not extend to any statements or information related to assets held for investment of the Plan (investment information) by a bank or similar institution or insurance carrier that is regulated, supervised, and subject to periodic examination by a state or federal agency, provided that the statements or information regarding assets so held are prepared and certified to by the bank or similar institution or insurance carrier in accordance with 29 CFR 2520.103-5 of the DOL's Rules and Regulations for Reporting and Disclosure under ERISA (qualified institution). Thomas Howell Ferguson P.A. did perform audit procedures on employee eligibility, employer and employee contributions, employee loans, etc. Accordingly, the objective of an ERISA Section 103(a)(3)(C) audit is not to express an opinion about whether the financial statements as a whole are presented fairly, in all material respects, in accordance with U.S. GAAP.

The attached financial statements along with the organization's Form 5500, will be filed with the IRS and Department of Labor by the October 15, 2023, deadline.

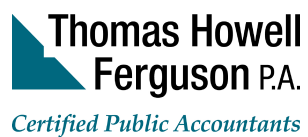
### **RECOMMENDATION**

Approval of the enclosed WorkNet Pinellas, Inc. 401(k) Plan Financial Statements and Supplemental Schedule for the years ended December 31, 2022, and 2021.

Financial Statements  
and Supplemental Schedule

**WorkNet Pinellas, Inc. 401(k) Plan**

*Years ended December 31, 2022 and 2021  
with Report of Independent Auditors*



WorkNet Pinellas, Inc. 401(k) Plan

Financial Statements  
and Supplemental Schedule

Years ended December 31, 2022 and 2021

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## Report of Independent Auditors

Plan Administrator  
WorkNet Pinellas, Inc. 401(k) Plan

### ***Scope and Nature of the ERISA Section 103(a)(3)(C) Audit***

We have performed an audit of the financial statements of WorkNet Pinellas, Inc. 401(k) Plan (the Plan), an employee benefit plan subject to the Employee Retirement Income Security Act of 1974 (ERISA), as permitted by ERISA Section 103(a)(3)(C) (ERISA Section 103(a)(3)(C) audit). The financial statements comprise the statements of net assets available for benefits as of December 31, 2022 and 2021, and the related statement of changes in net assets available for benefits for the year ended December 31, 2022, and the related notes to the financial statements.

Management, having determined it is permissible in the circumstances, has elected to have the audits of the Plan's financial statements performed in accordance with ERISA Section 103(a)(3)(C) pursuant to 29 CFR 2520.103-8 of the Department of Labor's (DOL) Rules and Regulations for Reporting and Disclosure under ERISA. As permitted by ERISA Section 103(a)(3)(C), our audits need not extend to any statements or information related to assets held for investment of the Plan (investment information) by a bank or similar institution or insurance carrier that is regulated, supervised, and subject to periodic examination by a state or federal agency, provided that the statements or information regarding assets so held are prepared and certified to by the bank or similar institution or insurance carrier in accordance with 29 CFR 2520.103-5 of the DOL's Rules and Regulations for Reporting and Disclosure under ERISA (qualified institution).

Management has obtained certifications from a qualified institution as of December 31, 2022 and 2021, and for the year ended December 31, 2022, stating that the certified investment information, as described in Note to the financial statements, is complete and accurate.

### ***Opinion***

In our opinion, based on our audits and on the procedures performed as described in the Auditor's Responsibilities for the Audit of the Financial Statements section:

- The amounts and disclosures in the accompanying financial statements, other than those agreed to or derived from the certified investment information, are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America (U.S. GAAP).
- The information in the accompanying financial statements related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

***Basis for Opinion***

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Plan and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our ERISA Section 103(a)(3)(C) audit opinion.

***Responsibilities of Management for the Financial Statements***

Management is responsible for the preparation and fair presentation of the financial statements in accordance with U.S. GAAP, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error. Management's election of the ERISA Section 103(a)(3)(C) audit does not affect management's responsibility for the financial statements.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern within one year after the date that the financial statements are issued or available to be issued.

Management is also responsible for maintaining a current plan instrument, including all plan amendments, administering the Plan, and determining that the Plan's transactions that are presented and disclosed in the financial statements are in conformity with the Plan's provisions, including maintaining sufficient records with respect to each of the participants, to determine the benefits due or which may become due to such participants.

***Auditor's Responsibilities for the Audit of the Financial Statements***

Except as described in the Scope and Nature of the ERISA Section 103(a)(3)(C) Audit section of our report, our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if, there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Plan's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern for a reasonable period of time.

Our audits did not extend to the certified investment information, except for obtaining and reading the certification, comparing the certified investment information with the related information presented and disclosed in the financial statements, and reading the disclosures relating to the certified investment information to assess whether they are in accordance with the presentation and disclosure requirements of U.S. GAAP.

Accordingly, the objective of an ERISA Section 103(a)(3)(C) audit is not to express an opinion about whether the financial statements as a whole are presented fairly, in all material respects, in accordance with U.S. GAAP.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.



***Other Matter - Supplemental Schedule Required by ERISA***

The supplemental schedule, Schedule H, Line 4i - Schedule of Assets Held at End of Year, for the year ended December 31, 2022, is presented for purposes of additional analysis and is not a required part of the financial statements but is supplementary information required by the DOL's Rules and Regulations for Reporting and Disclosure under ERISA. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information included in the supplemental schedule, other than that agreed to or derived from the certified investment information, has been subjected to auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with GAAS. For information included in the supplemental schedule that agreed to or is derived from the certified investment information, we compared such information to the related certified investment information.

In forming our opinion on the supplemental schedule, we evaluated whether the supplemental schedule, other than the information agreed to or derived from the certified investment information, including its form and content, is presented in conformity with the DOL's Rules and Regulations for Reporting and Disclosure under ERISA.

In our opinion:

- The form and content of the supplemental schedule, other than the information in the supplemental schedule that agreed to or is derived from the certified investment information, are presented, in all material respects, in conformity with the DOL's Rules and Regulations for Reporting and Disclosure under ERISA.
- The information in the supplemental schedule related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

Tallahassee, Florida  
NEED DATE

WorkNet Pinellas, Inc. 401(k) Plan

Statements of Net Assets Available for Benefits

	December 31,	
	2022	2021
<b>Assets:</b>		
Investments	\$ <u>2,865,017</u>	\$ <u>3,863,905</u>
Receivables:		
Notes receivable from participants	<u>54,076</u>	<u>110,411</u>
Total receivables	<u>54,076</u>	<u>110,411</u>
Total assets	2,919,093	3,974,316
<b>Liabilities:</b>		
Excess contributions payable	<u>6,475</u>	<u>6,182</u>
Total liabilities	<u>6,475</u>	<u>6,182</u>
Net assets available for benefits	\$ <u><u>2,912,618</u></u>	\$ <u><u>3,968,134</u></u>

*See accompanying notes to the financial statements.*

WorkNet Pinellas, Inc. 401(k) Plan

Statement of Changes in Net Assets Available for Benefits

Year Ended December 31, 2022

**Additions:**

Interest income on notes receivable from participants \$ 4,376

Contributions:

Participant 76,136

Employer 126,429

202,565

Total additions 206,941

**Deductions:**

Benefits paid to participants 628,977

Administrative expenses 27,492

Net Decrease in Fair Value of Investments 605,988

Total deductions 1,262,457

Net decrease in net assets available for benefits (1,055,516)

**Net assets available for benefits:**

Beginning of year 3,968,134

End of year \$ 2,912,618

*See accompanying notes to the financial statements.*

# WorkNet Pinellas, Inc. 401(k) Plan

## Notes to Financial Statements

Years ended December 31, 2022 and 2021

### **1. Description of Plan**

The following description of the WorkNet Pinellas, Inc. 401(k) Plan (the Plan) provides only general information. Participants should refer to the Plan agreement for a more complete description of the Plan's provisions.

#### **General**

The Plan was organized effective July 1, 2004. The plan has been amended throughout the years to comply with tax legislation, most recently restated effective January 1, 2022. The Plan is a defined contribution plan as described in Section 401 of the Internal Revenue Code (the Code) covering all employees. The Plan is subject to the provisions of the Employee Retirement Income Security Act of 1974 (ERISA). WorkNet Pinellas, Inc. (the Company) has overall responsibility for administering the Plan. The Plan's Custodian is responsible for the management and control of the Plan's assets. The Plan's Custodian and administrative agent, John Hancock, is responsible for the management and control of the Plan's assets. The Board of Directors is responsible for oversight of the Plan. The Investment Committee determines the appropriateness of the Plan's investment offerings, monitors investment performance, and reports to the Plan's Board of Directors.

The Plan was amended during 2022 to reflect certain requirements stipulated by the Setting Every Community Up for Retirement Enhancement Act of 2019 (the SECURE Act) and the Coronavirus Aid, Relief, and Economic Security Act (the CARES Act). Additionally, the plan was restated during 2022, effective January 1, 2022, in accordance with the IRS Revenue Procedure 2017-41.

#### **Eligibility**

The Plan covers all employees of the Company. Employees of the organization are eligible to participate in the deferral, employer nonelective and matching components of the Plan after completing six months of service. There is no minimum age requirement to participate in the Plan.

# WorkNet Pinellas, Inc. 401(k) Plan

## Notes to Financial Statements

### 1. Description of Plan (continued)

#### Contributions

Each year, participants may authorize the Company to contribute to the Plan up to 80% of their eligible annual compensation, subject to the maximum annual amount permitted under the Internal Revenue Code (IRC). Participants who attain age 50 before the end of the Plan year are eligible to make catch-up contributions. Participants may also make rollover contributions from amounts representing distributions from other qualified plans. Eligible employees may make pretax or post-tax contributions to the Plan. The Company may make nonelective contributions in a discretionary amount as determined by the Company, and such contributions are not contingent on current or retained earnings. During the year ended December 31, 2022, the Company contributed 5% of each eligible employee's salary on a bi-weekly basis. The Company may elect to make contributions in the form of a matching contribution, in relation to the participants' elective salary deferral contributions, subject to IRS limitations. The Company did not elect to make matching contributions for the year ended December 31, 2022. Participants direct the investment of contributions into various investment options offered by the Plan, subject to IRS limitations.

#### Participant Accounts

Each participant's account is credited with the participant's contribution, the Company's contributions, and Plan earnings.

Participant accounts are charged with an allocation of administrative expenses that are paid by the Plan. Allocations are based on participant earnings, account balances, or specific participant transactions, as defined. The benefit to which a participant is entitled is the benefit that can be provided from the participant's vested account.

#### Vesting

Participants are immediately fully vested in their contributions plus actual earnings thereon. Vesting in the Company's portion of their accounts and earnings thereon is based on years of continuous service. Participants are fully vested after one year of credited service. Participants become 100% vested upon death or becoming totally and permanently disabled while employed by the Company.

# WorkNet Pinellas, Inc. 401(k) Plan

## Notes to Financial Statements

### 1. Description of Plan (continued)

#### Notes Receivable from Participants

Participants may borrow from their accounts a minimum of \$500 up to a maximum equal to the lesser of \$50,000 or 50% of their vested account balance. Three outstanding loans are allowed at a time. Loan terms range from one to five years and are repaid in equal payroll period installments. The loans are secured by the balance in each participant's account and bear interest at rates 5.25% to 7.50%. The interest rate on any loan to a participant shall be a reasonable interest rate commensurate with current interest rates charged for loans made under similar circumstances by persons in the business of lending money.

#### Payment of Benefits

Payment of benefits after termination of employment is determined by the participant's account balance. If the vested account balance does not exceed \$5,000, the Plan will distribute the nonforfeitable portion in a lump sum payment as soon as practicable following the date of termination. If the vested account balance exceeds \$5,000, the Plan permits distribution as of any date following termination of employment with the employer at the election of the participant.

On termination of service due to death, disability or retirement, a participant may elect to receive an amount equal to the value of the participant's vested interest in his or her account in a lump sum amount.

#### Forfeitures

At December 31, 2022 and 2021, forfeited nonvested accounts totaled \$3,538 and \$3,538, respectively. These accounts may be used to reduce future employer matching contributions or to pay qualified plan expenses. During the year ended December 31, 2022, \$1,626 of forfeitures were used to reduce employer contributions or pay plan expenses.

#### Excess Contributions Payable

Amounts payable to participants for contributions in excess of amounts allowed by the IRS are recorded as a liability with a corresponding reduction to contributions.

### 2. Summary of Significant Accounting Policies

#### Basis of Accounting

The accompanying financial statements of the Plan are prepared on the accrual basis of accounting.

#### Payment of Benefits

Benefits are recorded when paid.

# WorkNet Pinellas, Inc. 401(k) Plan

## Notes to Financial Statements

### 2. Summary of Significant Accounting Policies (continued)

#### Use of Estimates

The preparation of financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of net assets available for benefits and changes therein. Actual results could differ from those estimates.

#### Investment Valuation and Income Recognition

Investments are reported at fair value. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. The Plan Administrator determines the Plan's valuation policies utilizing information provided by investment advisors, custodians, and insurance company. See Note 3 for additional discussion of fair value measurements.

Purchases and sales of securities are recorded on a trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded when received. Net appreciation (depreciation) includes the Plan's gains and losses on investments bought and sold as well as held during the year.

#### Notes Receivable from Participants

Notes receivable from participants are measured at their unpaid principal balance plus any accrued but unpaid interest. Interest income is recorded on the accrual basis. Related fees are recorded as administrative expenses and are expensed when they are incurred.

No allowance for credit losses has been recorded as of December 31, 2022 and 2021. If a participant ceases to make loan repayments and the plan administrator deems the participant loan to be in default, the participant loan balance is reduced and a benefit payment is recorded.

#### Expenses

Certain expenses of maintaining the Plan are paid by the Plan, unless otherwise paid by the Company. Expenses that are paid by the Company are excluded from these financial statements. Fees related to the administration of notes receivable from participants and benefit payments are charged directly to the participant's account and are included in administrative expenses. Investment related expenses are included in net appreciation in fair value of investments.

#### Subsequent Events

The Plan has evaluated subsequent events through NEED DATE, the date the financial statements were available to be issued. During the period from December 31, 2022 to NEED DATE, the Plan did not have any material recognizable subsequent events.



## WorkNet Pinellas, Inc. 401(k) Plan

### Notes to Financial Statements

#### 3. Fair Value Measurements

The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1) and the lowest priority to unobservable inputs (level 3). The three levels of the fair value hierarchy under FASB ASC 820 are described as follows:

- |         |   |
|---------|---|
| Level 1 | Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Plan has the ability to access.   |
| Level 2 | <p>Inputs to the valuation methodology include:</p> <ul style="list-style-type: none"><li>• quoted prices for similar assets or liabilities in active markets;</li><li>• quoted prices for identical or similar assets or liabilities in inactive markets;</li><li>• inputs other than quoted prices that are observable for the asset or liability; and</li><li>• inputs that are derived principally from or corroborated by observable market data by correlation or other means.</li></ul> <p>If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.</p> |
| Level 3 | Inputs to the valuation methodology are unobservable and significant to the fair value measurement.   |

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at December 31, 2022 and 2021.

*Mutual funds:* Valued at the daily closing price as reported by the fund. Mutual funds held by the Plan are open-end mutual funds that are registered with the Securities and Exchange Commission. These funds are required to publish their daily net asset value (NAV) and to transact at that price. The mutual funds held by the Plan are deemed to be actively traded.

# WorkNet Pinellas, Inc. 401(k) Plan

## Notes to Financial Statements

### 3. Fair Value Measurements (continued)

*Collective trust funds:* Valued at the unit price reported by the sponsoring trust company. The underlying investments owned by the funds can include money market funds, stable value funds, fixed-income securities registered investment companies, common stocks, corporate bonds, U.S. Government securities, other collective trust funds, or guaranteed insurance contracts priced by the sponsoring insurance company using applicable interest rates and contract provisions. The unit price is based on the fair value of these underlying investments owned, less any accrual of fees and expenses borne by the fund, and divided by the number of units outstanding. The unit price is readily determinable and quoted on the active private market on which participants can transact daily with no redemption restrictions on these investments.

The following table sets forth by level, within the fair value hierarchy, the Plan's investments at fair value as of December 31, 2022 and 2021:

Investments at Fair Value as of December 31, 2022				
	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Mutual funds	\$ 2,823,932	\$ -	\$ -	\$ 2,823,932
Collective trust funds	-	37,547	-	37,547
Interest-bearing cash	<u>3,538</u>	<u>-</u>	<u>-</u>	<u>3,538</u>
Total investments at fair value	<u>\$ 2,827,470</u>	<u>\$ 37,547</u>	<u>\$ -</u>	<u>\$ 2,865,017</u>

Investments at Fair Value as of December 31, 2021				
	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Mutual funds	\$ 3,845,425	\$ -	\$ -	\$ 3,845,425
Collective trust funds	-	14,942	-	14,942
Interest-Bearing Cash	<u>3,538</u>	<u>-</u>	<u>-</u>	<u>3,538</u>
Total investments at fair value	<u>\$ 3,848,963</u>	<u>\$ 14,942</u>	<u>\$ -</u>	<u>\$ 3,863,905</u>

### 4. Plan Termination

Although it has not expressed any intent to do so, the Company has the right under the Plan to discontinue its contribution at any time and to terminate the Plan subject to the provisions of ERISA. In the event of Plan termination, participants would become 100% vested in their entire account.

## WorkNet Pinellas, Inc. 401(k) Plan

### Notes to Financial Statements

#### **5. Tax Status**

The Plan has not requested a determination letter from the Internal Revenue Service (IRS) regarding the Plan's exemption from federal income tax under Section 401(a) of the Code. However, the Plan adopted a non-standardized pre-approved profit sharing plan sponsored by FIS Business Systems, LLC. The pre-approved plan has received an opinion letter dated June 30, 2020 from the IRS as to the pre-approved plan's qualified status. The preapproved plan opinion letter has been relied upon by this Plan. The plan administrator believes the Plan is designed and is being operated in compliance with the applicable provision of the Code, and as such, no provision for income tax has been included in the Plan's financial statements.

#### **6. Accounting for Uncertainty in Income**

Accounting principles generally accepted in the United States of America require plan management to evaluate tax positions taken by the Plan and recognize a tax liability if the Plan has taken an uncertain position that more likely than not would not be sustained upon examination by the IRS. The plan administrator has analyzed the tax positions taken by the Plan, and has concluded that as of December 31, 2022, there are no uncertain tax positions taken or expected to be taken that would require recognition of a liability (or asset) or disclosure in the financial statements. The Plan is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress. The plan administrator believes it is no longer subject to income tax examinations for years prior to 2018.

#### **7. Risks and Uncertainties**

The Plan invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect participants' account balances and the amounts reported in the statements of net assets available for benefits.

#### **8. Information Certified by John Hancock**

Certain information related to investments and notes receivable from participants disclosed in the accompanying financial statements and ERISA-required supplemental schedule, including investments and notes receivable from participants held at December 31, 2022, and net appreciation in fair value of investments, interest and dividend income, and interest income on notes receivable from participants for the year ended December 31, 2022, was obtained from management and agreed to or derived from information certified as complete and accurate by John Hancock, the Custodian of the Plan.

## WorkNet Pinellas, Inc. 401(k) Plan

### Notes to Financial Statements

#### 9. Related Party Transactions and Party In Interest Transactions

During 2022, certain Plan investments were managed by John Hancock. Transactions involving these investments are considered to be party-in-interest transactions. Fees paid by the Plan to John Hancock for administrative services amounted to \$27,492 for year ended December 31, 2022.

#### 10. Reconciliation of Financial Statements to the Form 5500

The following is a reconciliation of net assets available for benefits per the financial statements at December 31, 2022 and 2021, to the Form 5500:

	<b>December 31,</b>	
	<b><u>2022</u></b>	<b><u>2021</u></b>
Net assets available for benefits per the financial statements	\$ 2,912,618	\$ 3,968,134
Corrective distributions - 2021	-	6,182
Corrective distributions - 2022	<u>6,475</u>	<u>-</u>
Net assets available for benefits per the Form 5500	<u><u>\$ 2,919,093</u></u>	<u><u>\$ 3,974,316</u></u>

The following is a reconciliation of the change in net assets available for benefits per the financial statements for the year ended December 31, 2022, to the Form 5500:

Change in net assets available for benefits per the financial statements	\$ (1,055,516)
Corrective distributions - 2021	(6,182)
Corrective distributions - 2022	<u>6,475</u>
Net increase in net assets available for benefits per the Form 5500	<u><u>\$ (1,055,223)</u></u>

## Supplemental Schedule

WorkNet Pinellas, Inc. 401(k) Plan

Schedule H, Line 4i - Schedule of Assets Held at End of Year

December 31, 2022

	<u>Fair Value</u>
<b>John Hancock*</b>	
Investments in Registered Investment Companies	
TIAA-CREF Lifecycle Index Retirement Income Fund	\$ 1,382
TIAA-CREF Lifecycle Index 2015 Fund	8,869
TIAA-CREF Lifecycle Index 2020 Fund	52,213
TIAA-CREF Lifecycle Index 2025 Fund	498,684
TIAA-CREF Lifecycle Index 2030 Fund	211,258
TIAA-CREF Lifecycle Index 2035 Fund	444,618
TIAA-CREF Lifecycle Index 2040 Fund	804,107
TIAA-CREF Lifecycle Index 2045 Fund	437,507
TIAA-CREF Lifecycle Index 2050 Fund	189,606
TIAA-CREF Lifecycle Index 2055 Fund	69,172
TIAA-CREF Lifecycle Index 2060 Fund	53,903
TIAA-CREF Lifecycle Index 2065 Fund	3,702
John Hancock Stable Value Fund 10	37,547
BR INFLAT	6,493
U.S. High Yield Bond Fund	9,599
American Balanced Fund	6,843
TIAA-CREF Large-Cap Value Index Fund	7,308
Oppenheimer Global Fund	241
EUROPAC	5,528
500 INDEX FUND	4,129
TIAA-CREF Small-Cap Blend Index Fund	22
VS SCTEC	303
TIAA-CREF Large-Cap Growth Index Fund	5,021
Mid Value Fund	22
JPMorgan Emerging Markets Equity Fund	12
John Hancock Mid Cap Growth Fund	327
Invesco Small Cap Growth Fund	20
Fidelity Mid Cap Index Fund	19
Cohen & Steers Real Estate Securities Fund	2,528
BR Health	496
Total Investments in Registered Investment Companies	<u>\$ 2,861,479</u>
Forfeitures (Interest-bearing cash)	<u>\$ 3,538</u>
Total investments held at year end	<u>\$ 2,865,017</u>
Notes receivable from participants (interest rates 5.25% - 7.50%)	<u>\$ 54,076</u>

*\*Indicates a party in interest.*

Historical cost is not required to be presented as all investments are participant-directed.

The above information has been certified by John Hancock as complete and accurate.

*See report of independent auditors.*

To the Plan Administrator and Management and those charged with governance of  
WorkNet Pinellas, Inc. 401(k) Plan

We are pleased to present this report related to our audit of the financial statements WorkNet Pinellas, Inc. 401(k) Plan (the Plan) as of and for the year ended December 31, 2022. This report summarizes certain matters required by professional standards to be communicated to you in your oversight responsibility for the Plan's financial reporting process.

Auditing standards generally accepted in the United States of America (GAAS) (AU-C 260, *The Auditor's Communication With Those Charged With Governance*) require the auditor to promote effective two-way communication between the auditor and those charged with governance. Consistent with this requirement, the following summarizes our responsibilities regarding the financial statement audit as well as observations arising from our audit that are significant and relevant to your responsibility to oversee the financial reporting process.

Area	Comments
<p><b>Our Responsibilities With Regard to the Financial Statement Audit</b></p>	<p>Our responsibilities under auditing standards generally accepted in the United States of America have been described to you in our arrangement letter dated May 17, 2023. Our audit of the financial statements does not relieve management or those charged with governance of their responsibilities, which are also described in that letter.</p> <p>As management determined it is permissible in the circumstances and elected to have the audit of the Plan's financial statements performed in accordance with ERISA Section 103(a)(3)(C), the audit did not extend to any certified investment information, except for obtaining and reading the certification, comparing the certified investment information with the related information presented and disclosed in the financial statements, and reading the disclosures relating to the certified investment information to assess whether they are in accordance with the presentation and disclosure requirements of the applicable financial reporting framework.</p>
<p><b>Overview of the Planned Scope and Timing of the Financial Statement Audit</b></p>	<p>We have issued a separate communication dated May 17, 2023, regarding the planned scope and timing of our audit and identified significant risks.</p>



Area	Comments
<b>Accounting Policies and Practices</b>	<p><b>Adoption of, or Change in, Accounting Policies</b></p> <p>Management has the ultimate responsibility for the appropriateness of the accounting policies used by the Plan.</p> <p>AICPA Statement on Auditing Standards (SAS) 142–<i>Audit Evidence</i>, was implemented for the year ended December 31, 2022. The standard introduces changes to the auditing standards related to audit evidence, but had no effect on the financial statements.</p> <p><b>Significant Accounting Policies</b></p> <p>We did not identify any significant accounting policies in controversial or emerging areas for which there is a lack of authoritative guidance or consensus.</p> <p><b>Significant Unusual Transactions</b></p> <p>We did not identify any significant unusual transactions.</p>
<b>Management’s Judgments and Accounting Estimates</b>	<p>The preparation of financial statements often requires management to make estimates and assumptions that affect amounts recorded and disclosed in the financial statements. During our procedures, we did not become aware of any significant estimates that had a material effect on the financial statements. However, those charged with governance should evaluate financial activity throughout the year for changes in operations that could involve estimates, and in such cases work with management to identify and monitor the processes used to determine and account for such estimates.</p>

Area	Comments
<b>Audit Adjustments</b>	Audit adjustments proposed by us and recorded by the Plan are shown on the attached <b>Exhibit A</b> .
<b>Uncorrected Misstatements</b>	There were no uncorrected misstatements that management determined to be immaterial.
<b>Form 5500 Filing</b>	GAAS require that we obtain and read a draft of the Plan's Form 5500 that is substantially complete prior to the dating of our auditor's report in order to identify material inconsistencies, if any, with the Plan's audited financial statements. We read the Plan's draft Form 5500 filing for consistency with information in the financial statements. We did not identify material inconsistencies with the audited financial statements, other than appropriate reconciling items with the draft Form 5500 as disclosed in the notes to the financial statements.

Area	Comments
<b>ERISA-Required Supplemental Schedule</b>	<p>We subjected the information included in the ERISA-required supplemental schedule, other than that agreed to or derived from the certified investment information, to auditing procedures applied in the audits of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or the financial statements themselves, and other additional procedures in accordance with GAAS. The objective of these audit procedures was to determine whether the ERISA-required supplemental schedule, other than the certified investment information, is fairly stated in all material respects in relation to the financial statements as a whole, whether the form and content of the ERISA-required supplemental schedule are presented in conformity with the Department of Labor's (DOL) Rules and Regulations for Reporting and Disclosure Under ERISA, and whether the certified investment information in the supplemental schedule agrees to, or is derived from, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C). We will include an other-matter paragraph in our auditor's report for the ERISA-required supplemental schedule. We did not identify inconsistencies with the audited financial statements or with the certified investment information.</p>
<b>Observations About the Audit Process</b>	<p><b>Disagreements With Management</b></p> <p>We encountered no disagreements with management over the application of significant accounting principles, the basis for management's judgments on any significant matters, the scope of the audit, or significant disclosures to be included in the financial statements.</p>

Area	Comments
<b>Observations About the Audit Process (continued)</b>	<p data-bbox="776 394 1317 426"><b>Consultations With Other Accountants</b></p> <p data-bbox="776 447 1453 552">We are not aware of any consultations management had with other accountants about accounting or auditing matters.</p> <p data-bbox="776 573 1422 604"><b>Significant Issues Discussed With Management</b></p> <p data-bbox="776 625 1453 730">No significant issues arising from the audit were discussed or were the subject of correspondence with management</p> <p data-bbox="776 751 1453 821"><b>Significant Difficulties Encountered in Performing the Audit</b></p> <p data-bbox="776 842 1453 1024">We did not encounter any significant difficulties in dealing with management during the audit. We received full cooperation and appreciate the assistance provided by the Plan's financial and accounting personnel.</p>
<b>Reportable Findings</b>	<p data-bbox="776 1056 1453 1413">In planning and performing the audit, we considered plan provisions relevant to designing audit procedures for the purpose of expressing our opinion on the Plan's financial statements, but not for the purpose of expressing an opinion on the Plan's compliance with those provisions. Our audit was not designed to identify all instances that the Plan is not operating in accordance with the Plan's provisions or other specified criteria that might be considered reportable findings.</p> <p data-bbox="776 1434 1453 1465">A reportable finding is one or more of the following:</p> <ul data-bbox="776 1486 1453 1759" style="list-style-type: none"> <li data-bbox="776 1486 1453 1591">• A matter that is identified as an instance of noncompliance or suspected noncompliance with laws or regulations</li> <li data-bbox="776 1612 1453 1759">• A finding arising from the audit that is significant and relevant to those charged with governance regarding their responsibility to oversee the financial reporting process</li> </ul>

Area	Comments
<b>Reportable Findings (continued)</b>	<p>A deficiency in internal control identified during the audit that has not been communicated to management by other parties that is of sufficient importance to merit management's attention. We are required to communicate reportable findings from the audit procedures performed relating to the plan provisions to you, in writing.</p> <p><u>Missed Required Minimum Distribution</u></p> <p>One instance noted where an employee required to take a minimum distribution, as required by IRS regulations, did not take one during the year ended December 31, 2022. The distribution was taken shortly after year end. We suggest implementing monitoring controls to ensure all required minimum distributions are taken in the year required.</p>
<b>Shared Responsibilities: AICPA Independence</b>	<p>The AICPA regularly emphasizes that auditor independence is a joint responsibility and is managed most effectively when management, those charged with governance, and audit firms work together in considering compliance with AICPA independence rules. For Thomas Howell Ferguson (THF) to fulfill its professional responsibility to maintain and monitor independence, management, those charged with governance, and THF each play an important role.</p> <p><b>Our Responsibilities</b></p> <ul style="list-style-type: none"> <li>AICPA rules require independence both of mind and in appearance when providing audit and other attestation services. THF is to ensure that the AICPA's General Requirements for performing non-attest services are adhered to and included in all letters of engagement.</li> </ul> <p>Maintain a system of quality control over compliance with independence rules and firm policies.</p>

Area	Comments
<p><b>Shared Responsibilities: AICPA Independence (continued)</b></p>	<p><b>The Plan's Responsibilities</b></p> <ul style="list-style-type: none"> <li>• Timely inform THF, before the effective date of transactions or other business changes, of the following: <ul style="list-style-type: none"> <li>– New affiliates, directors, officers, or person in financial reporting oversight roles.</li> <li>– New beneficial owners of the Plan Sponsor's equity securities that have significant influence.</li> <li>– Change in corporate structure impacting affiliates such as add-on acquisitions or exits.</li> </ul> </li> <li>• Provide necessary affiliate information such as new or updated investment structure charts, as well as financial information required to perform materiality calculations needed for making affiliate determinations.</li> <li>• Understand and conclude on the permissibility, prior to the Plan and its affiliates, including the Plan Sponsor, and the officers, directors, or persons in a decision-making capacity, engaging in business relationships with THF.</li> </ul> <p>Not entering into relationships resulting in THF, THF covered persons or their close family members, temporarily or permanently acting as an officer, director, or person in an accounting or financial reporting oversight role at the Plan or Plan Sponsor.</p>
<p><b>Internal Control Matters</b></p>	<p>We did not identify any such matters requiring communication to those charged with governance during our audit of the financial statements.</p>
<p><b>Significant Written Communications Between Management and Our Firm</b></p>	<p>Copies of significant written communications between our Firm and the management of the Plan, including the representation letter provided to us by management, are attached as <b>Exhibit B</b>.</p>

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This report is intended solely for the information and use of those charged with governance of the Plan and management, and is not intended to be, and should not be, used by anyone other than these specified parties. It will be our pleasure to respond to any questions you have about this report. We appreciate the opportunity to continue to be of service to the Plan.

Tallahassee, Florida  
August 25, 2023



## **ACTION ITEM 3**

### **Employee Handbook Additions**

The Employee Handbook has been modified to add requirements that went into effect July 1, 2023, to modify hours for Lealman and Tarpon Springs offices and add Juneteenth as a holiday.

#### **Specifically:**

- Updated the Disability Accommodations Section to more broadly include accommodations under the Pregnant Workers Fairness Act that went into effect July 1.
- Added Civil Air Patrol leave requirements under Military Leave section that went into effect July 1.
- Updated hours for Lealman and Tarpon Springs offices; closed between 12 noon and 1 pm for lunch.
- Added Juneteenth as an office holiday.

#### **RECOMMENDATION**

Approval to revise Employee Handbook for above changes.





## **EMPLOYEE HANDBOOK**

**ADOPTED: JUNE 2, 2004  
REVISED: MARCH 18, 2020  
LAST REVISED: NOVEMBER 18, 2020**

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## Welcome to CareerSource Pinellas

On behalf of your colleagues, I welcome you to WorkNet Pinellas, Inc. dba CareerSource Pinellas (the “Company” or CareerSource Pinellas). We wish you every success here.

We believe that each employee contributes directly to CareerSource Pinellas’ growth and success, and we hope you will take pride in being a member of our team.

This Employee Handbook was developed to describe some of the expectations we have of you and outline the programs and benefits available to you. You should familiarize yourself with the contents of this Employee Handbook when you start at CareerSource Pinellas, and from time to time throughout your employment at CareerSource Pinellas, for it will answer many common questions about your employment with CareerSource Pinellas, as well as serve as a foundation for our relationship together.

We hope your experience here will be challenging, enjoyable and rewarding. Again, welcome!

Sincerely,

A handwritten signature in blue ink, appearing to read "St. Vincent", is positioned above the title "Chief Executive Officer".

*Chief Executive Officer*

## HISTORY AND MISSION

### History of CareerSource Pinellas

WorkNet Pinellas, Inc. dba CareerSource Pinellas was established in January 2001 under the general direction of the Pinellas County Board of County Commissioners and Workforce Florida, Inc., which is the state's chief workforce policy organization.

CareerSource Pinellas was created as a result of the Workforce Innovation Act of 2000 and received designation as the governing Workforce Board for Pinellas County, Region 14 of the State of Florida. The Pinellas County Board of County Commissioners designated CareerSource Pinellas as both the fiscal and administrative entity in the spring of 2004.

### Mission of CareerSource Pinellas

CareerSource Pinellas strives to foster Pinellas County's economic development and delivers workforce solutions designed to meet the needs of businesses and job seekers. Driven by business demand and supported by strategic partnerships, we provide the most comprehensive workforce development services in a one-stop environment. The career centers are conveniently located throughout Pinellas County in Tarpon Springs, Clearwater, and St. Petersburg.

CareerSource Pinellas offers a full range of career-planning services for professional and entry-level candidates. As the job marketplace gets more competitive, CareerSource Pinellas makes it easier to find a place among the region's top talent. Whether an entry-level or seasoned professional, military veteran, re-entering the workforce or looking to enhance skills for better earning power, our wide range of resources can help land the right job. Provided at no cost to clients, the centers are equipped with computers, copier and fax machines and telephones to assist with job searches.

CareerSource Pinellas can help leverage and support businesses' human resources function, from recruitment and training to labor market information and business seminars.

## **EMPLOYMENT STATUS**

### **Forms to be Completed Prior to Employment**

After an offer is made and before beginning employment at CareerSource Pinellas, all candidates must successfully complete the following:

- ✓ Employment Eligibility Verification (Form I-9)
- ✓ Employee's Withholding Certificate (Form W-4)
- ✓ Employee Handbook Acknowledgment
- ✓ Emergency Contact Numbers Form
- ✓ Authorization for Automatic Payroll Check Deposit
- ✓ Receipt of Employee Telephone Numbers
- ✓ Conflict of Interest Form
- ✓ Non-Disclosure Form
- ✓ Drug-Free Workplace Certification Form

### **Nature of Employment – At Will**

This Employee Handbook is intended to provide employees with a general understanding of CareerSource Pinellas' employment policies, benefits and programs. It is not an employment contract and is not intended to create contractual obligations of any kind. Neither the employee nor CareerSource Pinellas is bound to continue the employment relationship for any particular period of time. Either CareerSource Pinellas or the employee may choose, at its will, to end the employment relationship at any time, with or without notice, for any reason.

In order to retain necessary flexibility in the administration of policies, benefits and programs, CareerSource Pinellas reserves the right to change, revise or eliminate any of the policies, benefits or programs described in this Employee Handbook, except for its policy of employment-at-will. The only recognized deviations from the stated policies are those authorized by the Board.

### **Employment Classifications**

It is the intent of CareerSource Pinellas to clarify the definitions of employment classifications so that employees understand their employment status and benefit eligibility. These classifications do not guarantee employment for any specified period of time. Accordingly, the right to terminate the employment relationship at will at any time is retained by both the employee and CareerSource Pinellas.

CareerSource Pinellas designates each classification as either nonexempt or exempt based on federal and state wage and hour laws. An employee's nonexempt or exempt status may be changed from time to time by CareerSource Pinellas based on changes in job duties or the law.

1. *Nonexempt Employees* – Nonexempt employees are covered by the Fair Labor Standards Act (“FLSA”). They are not exempt from the law’s requirements concerning minimum wage and overtime. Nonexempt employees receive minimum wage and overtime in accordance with FLSA requirements.
2. *Exempt Employees* – Exempt employees are not covered by the FLSA. Exempt employees are exempt from the minimum wage and overtime provisions of the FLSA. Exempt employees do not receive minimum wage or overtime.

In addition to the nonexempt and exempt categories, each employee will belong to one other employment category:

1. *Regular Full-Time Employee* – An employee whose normal work schedule is for a minimum of thirty (30) hours per week and who maintains continuous regular employment status. Regular full-time employees are eligible for CareerSource Pinellas’ benefits, subject to the terms, conditions and limitations of each benefit program.
2. *Regular Part-Time Employee* – An employee whose normal work schedule is for less than thirty hours (30) hours per week and who maintains continuous regular employment status. Regular part-time employees may be eligible for some CareerSource Pinellas’ benefits, subject to the terms, conditions and limitations of each benefit program.
3. *Temporary Employees* – Employees who are hired on an interim basis, such as interns or interim replacements, to temporarily supplement the workforce or to assist in the completion of a special project. Employment assignments in this category are of a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status. Temporary employees retain this status until they receive written notification of a change by CareerSource Pinellas. While temporary employees receive all legally mandated benefits (such as Social Security and workers’ compensation insurance, if applicable), they are ineligible for CareerSource Pinellas’ benefit programs.
4. *Independent Contractors* – Independent contractors are those who are paid on a fee-for-services basis to perform certain specified services. Independent contractors are not employees of CareerSource Pinellas, are not covered by this Employee Handbook’s employment policies, do not receive wages CareerSource employees are entitled to and are ineligible for CareerSource Pinellas’ benefit programs.

### Termination of Employment

Termination of employment is an inevitable part of personnel activity within any organization, and many of the reasons for termination are routine. Below are examples of some of the most common circumstances under which employment is terminated:

1. *Resignation* – voluntary separation from employment initiated by an employee.
2. *Discharge* – involuntary employment termination initiated by the Company.
3. *Layoff* – involuntary employment termination initiated by the Company.
4. *Retirement* – voluntary employment termination initiated by the employee meeting age, length of service and any other criteria for retirement established by the Company.

It is our policy that all employees are employees “at-will.” This means that an employee may terminate his or her employment at any time for any reason, with or without notice and with or without cause, at the sole will of the employee. Likewise, CareerSource Pinellas may terminate the employment of any employee at any time for any reason, with or without notice and with or without cause, at its sole will. Any representations to the contrary, whether written or verbal, are unauthorized and shall be considered null and void and without effect.

CareerSource Pinellas requests at least a two (2) week written notice of resignation from non-supervisory employees and a one (1) month written notice from management personnel and employees working in supervisory positions. Employees not giving the appropriate above stated notice may lose their eligibility for rehire.

An employee will be considered as having resigned from his or her employment with CareerSource Pinellas if he or she has one (1) no-call, no-show absence from work without a reasonable, verifiable excuse.

CareerSource Pinellas may schedule exit interviews at the time of employment termination. The exit interview will afford an opportunity to discuss such issues as employee benefits including conversion/portability privileges, repayment of outstanding debts to the Company or return of the Company’s property. Suggestions, complaints and questions can also be voiced.



## **EQUAL OPPORTUNITY**

### **Equal Opportunity, Discrimination, Harassment, Retaliation and Related Conduct**

CareerSource Pinellas is committed to providing its employees and clients with equal opportunity and access to employment, programs, services and activities. In order to provide equal employment and advancement opportunities to all individuals, employment decisions at CareerSource Pinellas will be based on merit, experience, aptitude, qualifications and abilities alone.

CareerSource Pinellas is an equal employment opportunity employer and does not discriminate against any person because of race, color, religion, sex, pregnancy, national origin, disability, military or veteran status, age, marital status, genetic information, sexual orientation, gender identity or any other characteristic protected by law (referred to as “protected status”) and does not tolerate any such discrimination by or against its employees or clients utilizing CareerSource Pinellas services, programs and activities. This policy governs all aspects of employment, including selection, job assignment, working conditions, compensation, discipline, termination, and access to benefits and training, as well as all CareerSource Pinellas services, programs and activities.

One type of discrimination occurs when the terms and conditions of an individual's employment are based on these protected characteristics and not on the qualifications and abilities of the individual to do the job. Examples of this type of discrimination include basing hiring and termination decisions on the protected characteristics of an individual and not offering available opportunities to an individual because of a protected characteristic.

Another type of discrimination occurs when an individual is subject to harassment in the work environment or while utilizing CareerSource Pinellas services because of a protected characteristic. As with any other form of discrimination, CareerSource Pinellas will not tolerate inappropriate behavior by or against its employees based on a protected characteristic. This includes inappropriate behavior by other employees, managers, supervisors, directors, officers, applicants, contractors, vendors or clients coming into the workplace.

Inappropriate behavior becomes actionable in a court of law when it is severe or pervasive enough to create a work environment that is hostile or abusive. However, CareerSource Pinellas desires to provide for its employees and clients utilizing its services an environment that is free of all inappropriate behavior as described below as opposed to tolerating the inappropriate behavior until it becomes severe or pervasive. Thus, employees and managers should deal with inappropriate behavior as soon as it occurs so as to prevent any similar behavior from occurring.

It is inappropriate for an employee or client to be subject to unwelcome speech, conduct or other behavior that interferes with the conditions of work or CareerSource Pinellas services and is based on one of the protected characteristics. Inappropriate behavior

includes such things as making insulting or derogatory comments based on a protected characteristic, frequent teasing regarding a protected characteristic or any other behavior based on the protected characteristic of another may create an intimidating, hostile, or offensive working or service environment.

Inappropriate behavior based on sex may include not only the above but such things as unwanted physical touching, unwelcome sexual advances or requests for sexual behavior, the display of sexually suggestive objects or pictures in the workplace or basing employment or service decisions on an employee's or client's refusal to engage in sexual conduct.

Employees or clients utilizing CareerSource Pinellas services who believe they are being discriminated against or being subjected to inappropriate behavior or harassed, whether by CareerSource Pinellas employees, co-workers, supervisors, managers, directors, officers, contractors or vendors, may firmly and promptly notify the offender that the behavior is improper or unwelcome. At the same time, or in the alternative, if the employee or client does not desire to confront the offender, the employee or client may notify any CareerSource Pinellas manager with whom the employee or client is comfortable discussing the matter. If the complaint is against the Chief Executive Officer, then it may be filed with the Board Chair. For CareerSource Pinellas employees, there is no requirement to adhere to the chain of command in making complaints under this policy.

CareerSource Pinellas will swiftly and thoroughly investigate any complaints brought to its attention. In order for this to occur, it is recommended that the complainant contact CareerSource Pinellas as soon as possible. The investigation of the complaint will be handled as confidentially and independently as possible, taking into account the desires of the complainant, the rights of the accused, the nature of the complaint and the need to take corrective or disciplinary action. If CareerSource Pinellas determines that applicable policies or laws have been violated, CareerSource Pinellas will take appropriate corrective action, including, but not limited to, disciplinary action, up to and including termination of employment, or in the case of clients, necessary steps to address and prevent any inappropriate behavior.

Participants involved in the complaint investigation will be treated courteously. The making of a good faith complaint shall in no manner be used adversely against the complainant. CareerSource Pinellas will take corrective action that is effective and appropriate to the circumstances, including, but not limited to, disciplinary action, up to and including termination against any person attempting to retaliate against the complainant or anyone participating in the investigatory process, or in the case of a client, whatever legally appropriate steps are necessary to prohibit retaliation.

All employees have an obligation to report observed discrimination, harassment, inappropriate behavior or retaliation so that CareerSource Pinellas can take corrective action. Supervisors and managers have an obligation to report to the Equal Opportunity Officer or, if the allegations concern the CEO, report to the Equal Opportunity Officer or Board Chair, and take corrective action in a prompt manner with regard to discrimination,

harassment, inappropriate behavior or retaliation observed or reported; failure to report or take appropriate action may result in disciplinary action, up to and including termination.

Managerial and supervising employees will be trained regarding their responsibility upon receiving a verbal or written complaint and their responsibility to advise the complainant of available avenues to resolve the complaint. All new employees will receive training as to this policy. This policy will be distributed to all employees and available in CareerSource Pinellas workplaces.

### Disability Accommodation

CareerSource Pinellas is committed to ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a nondiscriminatory basis.

CareerSource Pinellas is committed to complying fully with the Americans with Disabilities Act (“ADA”) and ensuring equal opportunity in employment for qualified persons with disabilities. All employment practices and activities are conducted on a nondiscriminatory basis.

CareerSource Pinellas will make reasonable accommodations for qualified individuals with known disabilities unless doing so would result in an undue hardship. Qualified individuals with disabilities are entitled to equal pay and other forms of compensation (or changes in compensation) as well as in job assignments, classifications, organizational structures, position descriptions, lines of progression and seniority lists. Leave of all types will be available to all employees on an equal basis.

This policy is neither exhaustive nor exclusive. CareerSource Pinellas is committed to taking all other actions necessary to ensure equal employment opportunity for persons with disabilities in accordance with applicable federal, state and local laws. If you believe that you or someone else needs a reasonable accommodation or if you have any questions, concerns or suggestions relating to the ADA, contact the Human Resources Department. Any complaints or investigations related to disability discrimination will be addressed as provided above.

### PWFA (Pregnant Workers Fairness Act)

The Pregnant Workers Fairness Act (PWFA) is a new law that requires covered employers to provide “reasonable accommodations” to a worker’s known limitations related to pregnancy, childbirth, or related medical conditions, unless the accommodation will cause the employer an “undue hardship.” The PWFA protects employees and applicants of “covered employers” who have known limitations related to pregnancy, childbirth, or related medical conditions.

"Covered employers" include private and public sector employers with at least 15 employees, Congress, Federal agencies, employment agencies, and labor organizations.

"Reasonable accommodations" are changes to the work environment or the way things are usually done at work.

The House Committee on Education and Labor Report on the PWFA provides several examples of possible reasonable accommodations including the ability to sit or drink water; receive closer parking; have flexible hours; receive appropriately sized uniforms and safety apparel; receive additional break time to use the bathroom, eat, and rest; take leave or time off to recover from childbirth; and be excused from strenuous activities and/or activities that involve exposure to compounds not safe for pregnancy. Employers are required to provide reasonable accommodations unless they would cause an "undue hardship" on the employer's operations. An "undue hardship" is significant difficulty or expense for the employer.

Covered employers cannot:

- Require an employee to accept an accommodation without a discussion about the accommodation between the worker and the employer;
- Deny a job or other employment opportunities to a qualified employee or applicant based on the person's need for a reasonable accommodation;
- Require an employee to take leave if another reasonable accommodation can be provided that would let the employee keep working;
- Retaliate against an individual for reporting or opposing unlawful discrimination under the PWFA or participating in a PWFA proceeding (such as an investigation); or
- Interfere with any individual's rights under the PWFA.

## **EMPLOYEE COMPENSATION**

The CareerSource Pinellas pay period covers two complete work weeks. CareerSource Pinellas does not provide pay advances to employees on unearned wages. Paychecks will be distributed through direct deposit to employees' bank accounts every two weeks on the Friday immediately following the end of each two-week pay period. A non-negotiable copy of the paycheck with an attached earnings record will be available online on that same date to provide information regarding all deductions and any additional pay.

The law requires that CareerSource Pinellas make certain deductions from every employee's compensation. Among these are applicable federal income taxes. CareerSource Pinellas also must deduct Social Security taxes on each employee's compensation up to a specified limit that is called the Social Security "wage base". CareerSource Pinellas matches the amount of Social Security taxes paid by each employee.

CareerSource Pinellas offers programs and benefits beyond those required by law. Eligible employees may voluntarily authorize deductions from their paychecks to cover the costs of participation in these programs.

Employees' rate of pay will be determined at the time of employment based upon experience and education, the pre-established pay scale for the position, job duties, prevailing rates of pay for similar duties, availability of candidates, economic conditions and financial resources of CareerSource Pinellas.

All decisions regarding pay increases are made by the Board of Directors, or such supervisory personnel as the Board may designate, and will be based on the availability of CareerSource Pinellas funds, contractual obligations with third-party contractees and budgetary constraints. There is no guarantee of any pay increases.

## HOURS OF WORK

### Regular Work Schedule

CareerSource Pinellas' regular office hours are 8:00 AM to 5:00 PM, Monday through Friday. The Lealman and Tarpon Springs offices are closed daily from 12pm – 1pm. Employees are expected to maintain a regular work schedule of at least eight hours each day during CareerSource Pinellas' regular office hours. Moreover, employees may be required to work outside regular office hours and regular work schedules may fluctuate depending upon CareerSource Pinellas' needs. Employees are expected to be flexible and cooperative if work schedules are changed to meet business needs.

### Modified Work Schedule

A modified work schedule is defined as a schedule that regularly deviates from the regular work schedule. Before any modified work schedule is approved, employees must first exhaust all other leave options, such as PTO, FMLA, ADA, etc., if eligible. Any modified work schedule requires prior approval of the Chief Executive Officer ("CEO") and must adhere to the forty (40)-hour work week.

- ✓ All modified work schedules must be coordinated with other employees and approved by the appropriate supervisor, Director, and CEO to assure that there is coverage for all regular hours of business operation.
- ✓ Some functional areas may not be eligible for modified schedule due to the limited number of employees available and the need for coverage during all regular hours of business operation.
- ✓ There may be times when the special needs of CareerSource Pinellas require that the hours of work be adjusted by management. These requirements will supersede modified work schedules. All reasonable efforts will be made to accommodate both the needs of the operation and the needs of the employees.

### Timekeeping and Unscheduled Absences from Work

Accurately recording time worked is the responsibility of every nonexempt employee. Federal and state laws require CareerSource Pinellas to keep an accurate record of time worked in order to calculate employee pay and benefits. To ensure the accuracy of CareerSource Pinellas' time records, all nonexempt employees must enter their time worked daily. Time worked is all the time actually spent on the job performing assigned duties, at any CareerSource Pinellas location or other locations. All employees are strictly prohibited from working off-the-clock.

Altering, falsifying, tampering with time records, which are legal documents, or recording time on another employee's time record may result in disciplinary action, up to and including termination of employment.

Nonexempt employees should report to work no more than five (5) minutes prior to their scheduled start time nor stay more than five (5) minutes after their scheduled stop time without express, prior authorization from the CEO or designee.

### Lunch and Breaks

Nonexempt employees are required to take an unpaid lunch each workday of one (1) hour. Nonexempt employees are prohibited from performing work during their lunch period. The scheduling of the lunch period shall take place between 11:00 AM and 2:00 PM. Lunch periods should be coordinated with other department employees and approved by the supervisor. Employees may take one fifteen (15) minute break in the morning and one fifteen (15) minute break in the afternoon. Breaks are paid and cannot be added to lunch periods.

### Nonexempt (Hourly) Employees – Paid Time Off

CareerSource Pinellas policy allows accrued Paid Time Off (PTO) to compensate for hours not worked under 40 hours in one week. All unpaid time off must be pre-approved by the CEO or designee.

### Exempt (Salaried) Employees – Paid Time Off

CareerSource Pinellas policy allows partial day deductions using PTO hours to make up any hours not worked under 40 hours in one week; however, PTO may be taken in increments of four (4) hours only. Any unpaid time off must be pre-approved by the CEO or designee and must only be taken in a manner to ensure employees maintain their exempt status, such as unpaid leave in full-day increments for personal reasons other than sickness or disability. Exempt employees are not specifically required to work strictly from 8:00 AM to 5:00 PM and may be permitted variance based on job responsibilities, which also must be pre-approved by CEO or designee.

### Overtime

When operating requirements or other needs cannot be met during the regular work schedule, employees will be given the opportunity to volunteer for overtime work assignments. Authorized overtime may be granted by the CEO or designee but employees must receive such authorization in writing prior to working overtime. All overtime will be paid even if prior authorization is not received. Employees who work overtime without receiving prior authorization from the CEO or designee may be subject to disciplinary action, up to and including termination of employment.

Nonexempt employees will be paid overtime at a rate of 1.5 times their regular rate of pay in excess of a 40-hour week. Overtime compensation is paid to all **nonexempt** employees in accordance with federal and state wage and hour requirements. Overtime pay is based on actual hours worked. Time off for PTO, leave, holidays or any leave of absence will not be considered hours worked for purposes of performing overtime calculations.



## **USE, OWNERSHIP AND RETURN OF COMPANY SYSTEM AND PROPERTY**

CareerSource Pinellas computer hardware, software, e-mail, electronic messaging, instant or text messaging, phone (e.g., phone lines, cell phones, long distance carriers, 800 numbers), voicemail, intranet, internet and similar equipment, services and other means of electronic communications and storage devices is a private information system (the "System").

How you interact with our internal and external customers is a reflection on CareerSource Pinellas, your colleagues and yourself. It is important that all employees maintain excellent communication with internal and external customers when using the System. All e-mail messages and other communications, personal or business related, must be composed with the same professionalism as hard copy business correspondence.

The System is to be used primarily for business purposes only. While personal telephone calls are not prohibited, their frequency, duration and volume should not interfere with ongoing work duties nor distract fellow employees. This includes both incoming and outgoing telephone calls. Abuse of this privilege may lead to disciplinary action including, but not limited to, termination of employment. Employees may be required to reimburse CareerSource Pinellas for any charges resulting from their personal use of the System. Internet access to global electronic information resources on the World Wide Web is provided by CareerSource Pinellas to assist employees in obtaining work-related data and technology. While internet usage is intended for job-related activities, incidental and occasional brief personal use is permitted within reasonable limits.

All internet data that is composed, transmitted or received via the System is considered to be part of the official records of CareerSource Pinellas and, as such, is subject to disclosure to law enforcement or other third parties. Consequently, employees should always ensure that the business information contained in internet e-mail messages and other transmissions is accurate, appropriate, ethical and lawful.

CareerSource Pinellas has a networked computer system with different access rights for different employees. Many files and programs are accessed only by confidential passwords and/or pre-programmed access rights. Employees should not make any attempts to obtain or use a password, override or change access rights, access a file or retrieve any stored communications without having prior rights or authorization. Unless explicitly authorized by management, employees should respect the confidentiality of other employee electronic communication and may not attempt to determine passwords, or breach computer and network security measures or monitor electronic files or communications.



## IMPROPER USAGE:

CareerSource Pinellas strives to maintain a workplace free of harassment and sensitive to the diversity of its employees. Therefore, CareerSource Pinellas prohibits the use of the System in ways that are disruptive, offensive to others or harmful to morale.

Employees may not use the System to compose, transmit, access, or receive content that could be considered discriminatory, offensive, obscene, threatening, harassing, intimidating or disruptive to any employee or other person. Examples of unacceptable content may include, but are not limited to, sexual comments or images, racial slurs, gender-specific comments or any other comments or images that could reasonably offend someone on the basis of race, color, sex, age, religion, national origin, marital status, sexual orientation, disability, gender identity or genetic information or any other characteristic protected by law. CareerSource Pinellas' System may not be used to solicit others or distribute information for commercial ventures, religious or political causes, outside organizations or other non-business matters unless otherwise approved by management.

Employees may not use the System to infringe the copyright or other intellectual property rights of third parties, or otherwise engage in any illegal or wrongful conduct.

The unauthorized use, installation, copying or distribution of copyrighted, trademarked or patented material on the System is expressly prohibited. As a general rule, if an employee did not create material, does not own the rights to it or has not gotten authorization for its use, it should not be put on the System. Employees are also responsible for ensuring that the person sending any material over the System has the appropriate distribution rights. Any copyright infringement by an employee through use of CareerSource Pinellas' System may result in liability to CareerSource Pinellas, and CareerSource Pinellas may seek to indemnify itself by holding the employee responsible for any liability or damages caused by that employee.

CareerSource Pinellas purchases and licenses the use of various computer software for business purposes and does not own the copyright to this software or its related documentation. Unless authorized by the software developer, CareerSource Pinellas does not have the right to reproduce such software for use on more than one computer system. Therefore, employees are prohibited from the illegal duplication of CareerSource Pinellas' software and its related documentation. Employees are also prohibited from placing personal or other software on CareerSource Pinellas' System without prior written authorization, including software downloaded from the internet. Any authorized files or software that are downloaded from the internet or acquired from outside sources, including any files that have been accessed or manipulated on home computers or received as attachments to e-mail, must be scanned with a virus detection software before installation, execution or use of the file or software onto CareerSource Pinellas' System. All appropriate precautions should be taken to detect a virus and, if necessary, prevent its spread.

Employees may not use the System to download software unless they comply with established policies and check all such software for computer viruses. No personal software can be downloaded. The unauthorized use of the System for purposes of “snooping” and unauthorized use of encryption technology to block access to any file on the CareerSource Pinellas network is prohibited.

Employees are not to give, release or assist others in obtaining, without proper authority, to anyone not employed by CareerSource Pinellas or to another employee who has no need for the information, data or information of a confidential nature.

Employees should notify their immediate supervisor, the Human Resources Department or designee or any member of management upon learning of violations of this policy. Employees who violate this policy will be subject to disciplinary action, up to and including termination of employment.

#### CAREERSOURCE PINELLAS PROVIDED LAPTOPS AND OTHER DEVICES:

If CareerSource Pinellas has provided an employee with a CareerSource Pinellas owned laptop computer, cellphone or other electronic communication equipment or device for the employee’s use in providing services to CareerSource Pinellas, such equipment is provided strictly for CareerSource Pinellas business use and shall not be used by the employee for personal use. An employee’s personal data or information is not to be downloaded or stored on any CareerSource Pinellas computer or other equipment.

No CareerSource Pinellas information is to be downloaded or stored on any of an employee’s personal communication devices or equipment (personal computer or any device that records or retains electronic data or other information) unless the employee first receives written approval by management. No CareerSource Pinellas information including business contacts or leads, etc. is to be stored or transmitted to any separate equipment or device, internet or on-line based address book or social networking service unless the employee first receives written approval by management.

All business communications by e-mail or other electronic means of communication must be run through the CareerSource Pinellas systems and not through any outside (e.g., personal) e-mail or other system unless the employee first receives written approval by management. All employees must provide CareerSource Pinellas reasonable access to all CareerSource Pinellas equipment upon request at any time, and shall cooperate with CareerSource Pinellas in the file/data synchronization of its business data contained on any of the equipment. No employee is to delete or destroy any CareerSource Pinellas data absent express written approval by management. CareerSource Pinellas has the right to inspect CareerSource Pinellas issued laptop computers or other equipment at any time.

## USE OF CAREERSOURCE PINELLAS SYSTEM AND EQUIPMENT:

Equipment essential in accomplishing job duties is often expensive and may be difficult to replace. When using property, employees are expected to exercise care, perform required maintenance, and follow all operating instructions, safety standards and guidelines.

Please notify your supervisor if any component of the System, equipment, machines or tools appear to be damaged, defective or in need of repair. Prompt reporting of damages, defects and the need for repairs could prevent deterioration of equipment and possible injury to employees or others.

The improper, careless, negligent, destructive or unsafe use or operation of equipment can result in disciplinary action, up to and including termination of employment.

## NO EXPECTATION OF PRIVACY ON SYSTEM:

CareerSource Pinellas reserves the right to retrieve and review any message composed, sent, viewed or received on the System, even if the employee is using the System to view or send personal e-mail or other personal internet based communications (social media) that are accessed from the System. Consequently, the ultimate privacy or confidentiality of messages and the use of the internet cannot be ensured. Anyone using the System expressly consents to the monitoring of their activities on the System (including e-mail, messaging, voicemail and use of the internet for any reason – business or personal) and to the retrieval of data from any computer hardware or other part of any system that records or stores electronic data or information. There is no personal right of privacy in these messages or equipment and employees should not expect that their activities, messages or data contained on any equipment or that utilize any part of the System are private.

CareerSource Pinellas may engage in monitoring of electronic mail messages or other electronic files created or accessed by employees. All employees must treat the System (including e-mail and use of the internet) with respect and only use it for official CareerSource Pinellas business or in a manner otherwise consistent with this policy and other policies and expectations of CareerSource Pinellas. Even when an e-mail message or internet history is deleted, it can remain in the computer's memory system and can often be retrieved at a later date.

Although employees need a password to access the voicemail system, they should not expect that voicemail messages are private, all messages are company records. The employee's supervisor and the Human Resources Department or designee will maintain a log of all voicemail passwords. Employees must inform their supervisor and the Human Resources Department representative or designee immediately if they change the voicemail password on their phone.

Any items or parcels taken out of or off CareerSource Pinellas premises or property are subject to inspection/search. An employee's desk, workstation, work area, computer terminal, memory files, etc. and voicemail are subject to inspection/search at any time. CareerSource Pinellas may monitor any conversation or activity an employee has on CareerSource Pinellas owned or controlled premises or Systems, employees are subject to inspection/search, as permitted by law. Refusal to permit such search may result in disciplinary action up to and including termination.

An employee is prohibited from placing any new passwords or restrictors, or changing any existing passwords on any document, or component of the System without the prior authorization of management. Any password or restrictor must be revealed to and maintained by a second authorized source.

#### CAREERSOURCE PINELLAS DATA AND INFORMATION:

Any data stored or maintained on the System shall remain CareerSource Pinellas property and must be returned to CareerSource Pinellas upon request, at any time, or upon the termination of employment with CareerSource Pinellas. Employees must comply with all CareerSource Pinellas document and data retention policies. Any CareerSource Pinellas information and/or data saved or stored on any employee's personal laptop or home computer, or any other equipment or storage device, are also CareerSource Pinellas property and must be returned to CareerSource Pinellas upon request, at any time, or upon the termination of employment with CareerSource Pinellas. Such use of personal or third party equipment for CareerSource Pinellas business requires written approval by CareerSource Pinellas.

#### RETURN OF PROPERTY:

Employees are responsible for items issued to them by CareerSource Pinellas or in their possession or control, such as the following:

- Credit cards
- Equipment (computer, laptop, printer, furniture, etc.)
- Keys/key cards

Employees must return all CareerSource Pinellas property (equipment, documents, data, electronic information, copies, etc.) immediately upon request or upon termination of employment.

Unless otherwise prevented by state law, upon the termination of employment with CareerSource Pinellas, employees may not destroy any information related or belonging to CareerSource Pinellas (including any memoranda, records, files, user names and passwords, e-mail correspondence, and other documents and materials, including photocopies and other reproductions), and shall immediately surrender to CareerSource Pinellas any and all such information, regardless of the format or medium in which they are stored. Should an employee fail to comply with the provisions of this, in addition to any other remedies available to CareerSource Pinellas, the employee shall reimburse

CareerSource Pinellas for any damages that CareerSource Pinellas may incur as a result of the employee's destruction of or the failure to surrender the aforementioned information, including without limitation for the amount of time that has to be expended by CareerSource Pinellas' officers, directors, employees, agents or independent contractors to restore or recreate the information that the employee destroyed or failed to surrender.

## **DEVELOPMENT, USE AND OWNERSHIP OF INTELLECTUAL PROPERTY**

This policy applies to intellectual property authored, created, made, conceived, invented, reduced to practice or otherwise developed by CareerSource Pinellas employees, which intellectual property arises from or is developed in relation to activities of employees as employees of CareerSource Pinellas, employees' participation in activities, projects or services of CareerSource Pinellas, including without limit, consultant work, workforce development planning, implementation activities, research, technical work, labor and other activities, in relation to the use of CareerSource Pinellas Resources or otherwise qualifies as CareerSource Pinellas Intellectual Property ("CareerSource Pinellas IP") as defined below in this policy.

It is the intent of this policy to ensure that employees understand CareerSource Pinellas' ownership rights in intellectual property created by employees in these and other scenarios or which otherwise qualifies as CareerSource Pinellas IP. This policy has been established to promote innovation and provide public benefit through the creation, development and improvement of intellectual property and technology, products, methods and practices created by employees, all of which is considered part of CareerSource Pinellas IP owned by CareerSource Pinellas. This policy, seeks to ensure that CareerSource Pinellas IP is appropriately developed, protected, used and deployed, thereby advancing CareerSource Pinellas' mission.

### **CAREERSOURCE PINELLAS INTELLECTUAL PROPERTY:**

The policy of CareerSource Pinellas is that CareerSource Pinellas shall gain and retain ownership of any intellectual property, including without limit any invention, works of authorship, software code, trade secrets, trademarks, and data as part of CareerSource Pinellas IP, which is authored, created, made, conceived, invented, reduced to practice or otherwise developed by employees (whether solely or jointly with others) in any of the following scenarios: (i) in the field or discipline in which the employee is engaged as an employee of CareerSource Pinellas regardless of whether it is identified as a specific job responsibility or within the scope of job responsibilities; (ii) during, associated with or within the scope or course of an employee's work, role, duties and/or responsibilities or other services performed for or on behalf of CareerSource Pinellas, whether requested directly or not by CareerSource Pinellas; (iii) on, during or in association with any CareerSource Pinellas project, technology equipment or research; (iv) using CareerSource Pinellas Resources, in or related to the authoring, conception, reduction to practice, invention, or the creation of any intellectual property or portion thereof; or (iv) based on, derived from or improving upon any other CareerSource Pinellas IP or otherwise qualifies as CareerSource Pinellas IP under this Intellectual Property Policy ("Work-Related IP"). CareerSource Pinellas IP includes such intellectual property created by employees as Work-Related IP as well as intellectual property obtained by contract, license, assignment or creation as a work-for-hire by or from employees.

CareerSource Pinellas Resources shall include CareerSource Pinellas' funds, equipment, facilities, materials, resources, data, information technology, time or personnel.

CareerSource Pinellas has a legitimate interest in such employee-created Work-Related IP being part of CareerSource Pinellas IP, and thereby owned by CareerSource Pinellas. It is therefore the policy of CareerSource Pinellas that all Work-Related IP will be part of CareerSource Pinellas IP and shall be the sole property of CareerSource Pinellas, except and unless explicitly otherwise governed by other provisions of this policy or other mutually executed written agreements which may be approved by the proper CareerSource Pinellas authority from time to time.

It is the policy of CareerSource Pinellas to assert its ownership of such CareerSource Pinellas IP in accordance with the terms of this policy for the purpose of promoting the use, distribution, licensing and commercial exploitation of such CareerSource Pinellas IP to improve the effectiveness and scope of CareerSource Pinellas services and benefits the public. It is not the policy of CareerSource Pinellas to assert ownership of intellectual property created by employees where such intellectual property does not qualify as CareerSource Pinellas IP, because it does not qualify as Work-Related IP, or does not meet such other qualifications as CareerSource Pinellas IP otherwise under the definition of CareerSource Pinellas IP or by contract or law.

CareerSource Pinellas shall oversee the protection of any Work-Related IP as part of CareerSource Pinellas IP which it decides to protect, commercialize or otherwise exploit, including selecting and engaging necessary professional services. CareerSource Pinellas IP may be commercialized by CareerSource Pinellas or in connection with third parties from which royalties or other payments can accrue, or through direct manufacture or marketing of the CareerSource Pinellas IP by or on behalf of CareerSource Pinellas to the public.

#### DISCLOSURE AND DETERMINATION OF CAREERSOURCE PINELLAS IP:

CareerSource Pinellas employees are required to disclose to CareerSource Pinellas any intellectual property conceived or reduced to practice, individually by employee or jointly with others, which would be controlled by this intellectual property policy, including any intellectual property which may qualify as CareerSource Pinellas IP under this policy. The employee must disclose such intellectual property, including all supporting documents, evidence, materials, data, prototypes and samples related to the intellectual property or necessary for the understanding, protection, use, publication or commercialization of such intellectual property. Employee must make such disclosure within thirty (30) days of the earlier of the conception, reduction to practice, fixation in a tangible medium or other acquisition or understanding of such intellectual property. Employee must also make such disclosure prior to any publication, offer for sale, sale, or public disclosure or use. Such disclosure and timing requirements are necessary in order for CareerSource Pinellas to reasonably and responsibly assess and evaluate the intellectual property for



protection, licensing and commercialization and for determining ownership of intellectual property and CareerSource Pinellas IP created by employees.

If an employee has a question about whether certain intellectual property created by the employee qualifies as Work-related IP or would constitute personal intellectual property, employee must contact the CareerSource Pinellas CEO for evaluation. CareerSource Pinellas retains the discretion to determine whether, based on the facts, creation of the intellectual property created by employee qualifies as Work-Related IP owned by CareerSource Pinellas or whether it would qualify as personal intellectual property of the employee.

#### PROHIBITED ACTIONS BY EMPLOYEES:

Employees shall not disclose, publish, use or commercialize CareerSource Pinellas IP without prior written approval of the CEO, unless required to do so by law.

Employees shall not enter into agreements related to the Work-Related IP, or any other CareerSource Pinellas IP, without prior written approval from the CareerSource Pinellas CEO. For example, employees shall not sign confidentiality agreements, assignments, license agreements, material transfer agreements, research agreements, or any other agreements that may restrict, commit, or affect CareerSource Pinellas IP that they may have created, without prior written approval of the CEO.

Employees shall not sell, license, assign, encumber or otherwise transfer CareerSource Pinellas IP, including without limit Work-Related IP, without prior written approval of the CEO.

Employees shall not publicly disclose or publish research findings, publications or any of the information involving any potential CareerSource Pinellas IP (including without limit any Work-Related IP) or other work-related data or results without prior written approval from the CEO, unless required to do so by law.

Employees shall not use trademarks, logos, names or other CareerSource Pinellas-associated identifying indicia for any uses outside of official CareerSource Pinellas business without the prior written approval of the CEO. Employees shall not enter agreements for use or licensing of any CareerSource Pinellas-associated trademarks without the prior written approval of CareerSource Pinellas management.

Employees shall not disclose confidential information or publish any CareerSource Pinellas trade secrets, confidential data, inventions or patent applications that have not yet been published unless they receive prior written approval of the CEO, and have executed a confidentiality agreement with CareerSource Pinellas, unless required to do so by law. Such Employees shall take reasonable measures to ensure the secrecy of CareerSource Pinellas IP.



Employees shall not apply for or otherwise seek protection or registration (including copyright, patent, or trademark registration) of any CareerSource Pinellas IP (including without limit any Work-Related IP) without prior written approval of the CEO.

All Employees shall refrain from any act that would encumber, defeat or limit CareerSource Pinellas' IP or other rights in any intellectual property which employee authors, makes, conceives, reduces to practice, fixes in a tangible medium or otherwise discovers or develops.

## EMPLOYEE BENEFITS

CareerSource Pinellas is committed to providing employees with a benefits program that is both comprehensive and competitive. Benefits are made possible by employees and management working together and performing their respective job responsibilities to the best of their ability. The Company's benefits program will continue to be reviewed in an effort to provide good coverage.

Efforts have been made to provide a clear explanation of the benefits in non-legal language. However, benefits are defined in plan documents and, should questions arise, the plan documents will govern and not the wording of this Employee Handbook. We want you to understand all the benefits and should you have questions, do not hesitate to contact the Human Resources Department.

CareerSource Pinellas reserves the right, in its discretion, to change the nature of the benefits offered to employees, or to change insurance carriers, deductibles, premiums or other features of any benefit at any time. In addition, CareerSource Pinellas may decide to discontinue one or more benefits. Covered employees will be notified of such changes or discontinuation.

### Benefits – Group Health

CareerSource Pinellas offers benefits to regular full-time employees as follows: Eligibility for group health insurance is the first day of a month after 30 days of full-time employment.

### Paying for Benefits

CareerSource Pinellas provides regular full-time employees with a benefit stipend annually to purchase options approved by the Board to purchase health and welfare benefits. In addition, the Company will provide regular full-time employees life, AD&D, short-term disability and long-term disability insurance.

The benefits offered at group rates are medical/prescription drug, dental, vision, life and AD&D, short-term disability and long-term disability insurance.

If employees choose to opt out of the group health plan, proof of other coverage is required. Opting out of the plan makes the employee ineligible for medical/prescription drug and mental health benefits.

### 401(k) Retirement Plan

CareerSource Pinellas offers regular full-time and part-time employee's access to a 401(k) Retirement Plan that makes saving for retirement easy and convenient.

CareerSource Pinellas will make Non-Elective Contribution ("NEC") of 5% of regular full-time employees' earnings on a bi-weekly basis; eligibility begins after six months of employment. In addition, CareerSource Pinellas offers a Roth option which will allow you

to set aside after-tax earnings to grow tax-free. Regular part-time employees may also participate in the 401(k) if they work for CareerSource Pinellas at least 1,000 hours within any calendar year.

Employees age 50 and over can make additional catch-up contributions to the plan. Employees are 100% vested in company contributions after one year of employment.

Visit [www.mykplan.com](http://www.mykplan.com) for more information on enrollment and investment options, more detailed provisions of the plan.

### *Educational Reimbursement*

As an organization that has as one of its goals to upgrade the workforce of the region, CareerSource Pinellas provides its own regular full-time employees the opportunity to enrich and enhance their value to themselves and to CareerSource Pinellas by providing them with assistance for educational expenses when budget considerations permit. CareerSource Pinellas will reimburse up to \$1,000 per year toward resident tuition costs, laboratory fees, and textbook rentals or purchases to regular full-time employees who enroll in accredited college, university or continuing education courses provided –

- ✓ The employee has one (1) year of service with the Company unless the training is required for the employee to fulfill job duties and is pre-approved by the CEO.
- ✓ Credit courses are directly related to the employee's current work assignment or count toward a formal degree program that relates to the mission of the organization.
- ✓ Non-credit courses are directly related to the employee's current work assignment.
- ✓ At the completion of a course(s), the employee submits an official grade report indicating completion of the course with a grade of C or better.
- ✓ A receipt for educational expenditures must be submitted.
- ✓ The employee has received prior approval from the CEO that the course(s) to be taken is eligible for reimbursement. A request for educational assistance shall be submitted in writing.
- ✓ The course is not to be taken during the employee's work duty hours.
- ✓ Tuition reimbursement shall be limited to the prevailing residential tuition schedule at the State Universities and Community Colleges in the immediate Tampa Bay Area.
- ✓ When tuition, fees and textbooks can be paid by other financial aid sources, CareerSource Pinellas will reimburse only the difference between the actual cost and the financial assistance.
- ✓ Employees who receive educational assistance in any fiscal year, but resign from employment prior to the end of that fiscal year shall reimburse a pro rata share of the funds received based on the number of pay periods (of 26) remaining in the fiscal year after their last day worked.
- ✓ When reimbursement for educational assistance is to be for specialized training for the benefit of CareerSource Pinellas and/or will exceed \$1,000, a contractual

agreement between the employee and CareerSource Pinellas (by its CEO) will be developed which delineates-

- A commitment of the employee to remain in employment with CareerSource Pinellas for a finite time, and/or
- A provision for repayment of the reimbursement.

### Paid Time Off (PTO)

The Company has established a Paid Time Off ("PTO") policy for all regular full-time employees. CareerSource Pinellas believes that employees should have opportunities to enjoy time away from work to help balance their lives. CareerSource Pinellas recognizes that employees have diverse needs for time off from work. We have established this PTO policy to meet those needs.

In establishing this policy, CareerSource Pinellas is providing a mere gratuity to its employees; PTO time will not be considered an amount due or wage owed to employees. Employees are accountable and responsible for managing their own PTO hours to allow for adequate reserves if there is a need to cover vacation, illness or disability, appointments, emergencies or other needs that require time off from work. PTO will not be counted for the purpose of calculating overtime and will not be paid in excess of 40 hours per week. Employees are to request PTO through their immediate supervisor, who has the discretion to approve or disapprove based on Company needs. Adequate staffing must be maintained at all times.

During the first year of employment, PTO hours will be prorated from the date of hire for the calendar year. PTO accruals are available for use in the pay period following the pay period in which they are accrued. PTO accrual is based on the number of full years of employment, and follows the following schedule:

Length of Service	Maximum Annual Accrual of Hours	Hours Accrued per 80 Hours Worked
Year 1 – 2	136 hours	5.23 hours
Years 3 – 4	160 hours	6.15 hours
Years 5 – 6	184 hours	7.07 hours
Years 7+	208 hours	8.00 hours

### Use and Scheduling of PTO

Whenever possible, **PTO must be scheduled well in advance**. It is subject to Company approval, staffing needs and established procedures. Unscheduled absences will be monitored. An employee will be counseled when the frequency of unscheduled absences adversely affect the operations. CareerSource Pinellas may request the employee provide a statement from his or her health care provider at any time concerning the justification for an unscheduled absence. PTO may not be used for missed time because an employee reports late to work, except during inclement weather. PTO is paid at the employee's straight time rate. Employees are required to use available PTO when taking

time off from work with the exception of a Company-required absence due to low workload or absences occasioned by the Company.

Guidelines for Use of Paid Time Off ("PTO")

- a) Employees may use PTO for unscheduled absences due to illness, illness in the family, personal business and other necessary causes for absences from work.
- b) Employees may accumulate PTO hours for use or payout in the future. However, accumulation of PTO hours may not exceed a total of 480 hours. If an employee exceeds 480 hours of accrued PTO, the excess over 480 hours accrual will stop, and may be lost to the employee at the end of the calendar year. For those employees who have exceeded 480 when this Employee Handbook is approved by the Board of Directors, they will be grandfathered per prior approved policy. Due to the needs of the business, no employee may urgently take PTO in order to reduce the hours accrued. Request for PTO must follow the normal procedure, even when maximum hours have been accrued.
- c) It shall be the policy of CareerSource Pinellas to encourage employees to take some of their PTO each year for vacation purposes. Requested time off for vacations will be approved by employees' supervisors only when arrangements can be made to assure required staff coverage. When there is a conflict, scheduling will be at the supervisor's discretion. Time off for vacation must be requested in accordance with departmental procedures. Preference in scheduling will normally be given to the employee who requested the time off first.
- d) Employees may use PTO hours down to a zero balance. Employees may not take PTO that has not yet been earned; that is, employees may not "borrow" against future accruals of PTO in order to take paid time off.
- e) PTO will be charged (that is, the employee's accrued PTO balance will be reduced) according to the actual number of hours used by the employee for the days that the employee would normally work.
- f) PTO hours used during a pay period shall not be counted as hours worked for the purpose of computing overtime.
- g) At the end of each calendar year, if funds are available and the CEO approves, CareerSource Pinellas may allow employees to request a payout of unused PTO hours with the following restrictions:
  - ✓ The employee PTO balance must exceed 160 hours, and the employee must retain an 80 hour balance after the election of a payout.
  - ✓ For those who have accrued the maximum of 480 hours they will be asked to receive a payout of partial or all (while leaving 80 hours remaining) in order to maintain accrual.
  - ✓ Subject to the above, the employee must request a payout of 80 hours or more.
  - ✓ PTO hours selected for payout will be paid at the employee's compensation rate in effect on December 31 of the year the election is made.
  - ✓ Payouts to employees will be made in the first pay period in February.
- h) PTO shall be paid at the employee's current hourly rate plus differentials and other premiums if applicable, at the time that it is taken.

- i) Accrued but unused PTO may be paid to terminating employees, but only if they were employed with CareerSource Pinellas at least ninety (90) days.

Employees are accountable and responsible for managing their own PTO hours to allow for adequate reserves if there is a need to cover vacation, illness, or disability, appointments, emergencies or other needs that require time off from work.

An employee who has exhausted PTO and is not eligible for leave under the Americans with Disabilities Act, the Family and Medical Leave Act or other applicable law has no right to take unpaid leave and is not entitled or allowed to miss work. An employee who does so will be subject to disciplinary action, up to and including termination.

### Holidays

All regular full-time and part-time employees will receive the following paid holidays:

- 1) New Year's Day ..... January 1
- 2) Martin Luther King Jr's Birthday ..... Third Monday in January
- 3) Memorial Day ..... Fourth Monday in May
- 4) Juneteenth.....June 19
- 5) Independence Day..... July 4
- 6) Labor Day.....First Monday in September
- 7) Veterans' Day..... November 11
- 8) Thanksgiving Day.....Fourth Thursday in November
- 9) Friday after Thanksgiving Day.....Fourth Friday in November
- 10) Christmas Day..... December 25

If the holiday falls on a weekend, employees will receive the preceding Friday or following Monday as the paid holiday. If Christmas Day falls on a Tuesday or Thursday, the preceding Monday or following Friday shall also be recognized as a holiday. If an employee works a paid holiday, he or she will receive another day as the paid holiday. Paid time off for holidays will not be counted as hours worked for the purposes of determining overtime. Regular full-time employees receive eight (8) hours of holiday pay for each holiday. Regular part-time employees receive four (4) hours of holiday pay for each holiday.

### Nursing Mothers Accommodations

CareerSource Pinellas seeks to ease the transition of mothers returning to work following the birth of a child with lactation accommodations for nursing mothers. For up to a year following a child's birth, nursing employees will be provided break time to express breast milk to accommodate their nursing needs during the workday. Said employees will be allowed a reasonable break time whenever they have the need to express milk throughout the day. The employee will work with her supervisor in developing a schedule.

Employees with questions or concerns regarding this policy should contact the Human Resources Department.

### Workers Compensation

CareerSource Pinellas provides a comprehensive workers' compensation insurance program at no cost to employees. This program covers any injury or illness sustained in the course of employment that requires medical, surgical or hospital treatment. Subject to applicable legal requirements, workers' compensation insurance provides benefits after a short waiting period or, if the employee is hospitalized, immediately.

Employees who sustain work-related injuries or illnesses, no matter how minor, must report them to their supervisor immediately or at least within 24 hours of the accident or occurrence. This will enable an eligible employee to qualify for coverage as quickly as possible.

## LEAVE BENEFITS (OTHER THAN PTO AND HOLIDAY LEAVE)

### Bereavement/Funeral Leave

If there is a death in the immediate family (spouse or life partner, parent, child, sibling, grandparent or grandchild), regular full-time employees are entitled to receive up to a maximum of three (3) days off from work with pay. These days must be consecutively scheduled and will be paid at a straight time rate. Bereavement leave will not be counted for the purpose of calculating overtime and will not be paid in excess of 40 hours per week.

### Domestic Violence Leave

CareerSource Pinellas allows employees to take up to three (3) days of leave in any twelve (12) month period if the employee or a family or household member of an employee is a victim of domestic violence or sexual violence. Employees may use their accrued PTO or unpaid leave to do so. CareerSource Pinellas will maintain the confidentiality of the requested leave as well as any information related to the employee's leave in accordance with law.

### Emergency Leave

At times, emergencies such as severe weather, fires, power failure or the like can disrupt CareerSource Pinellas operations. In extreme cases, these circumstances may require the closing of a work facility.

When operations are officially closed due to emergency conditions, regular full-time employees will be paid for time off, up to four (4) days maximum, including the day employees arrived in which the offices closed early due to emergencies. Employees may take unused PTO benefits for any additional days after four (4), if closure is longer. Any employee who fails to return to work once office is opened will be subject to disciplinary action, up to and including termination.

Employees in essential operations may be asked to work on a day when CareerSource Pinellas offices are officially closed. In these circumstances, employees who work will receive their regular pay.

### Family and Medical Leave

OVERVIEW: Under the Family and Medical Leave Act ("FMLA"), employees are afforded certain rights concerning family care and medical leave. Accordingly, CareerSource Pinellas will grant up to 12 weeks (or up to 26 weeks of military caregiver leave to care for a covered service member with a serious injury or illness) of FMLA leave during a 12-month period to eligible employees. The FMLA leave may be paid, unpaid or a combination of paid and unpaid leave, depending on the circumstances of the leave and as specified in this Employee Handbook. All employees are required to use all accrued PTO towards FMLA leave, until they have exhausted all available hours. If on full-time



unpaid leave, employees will not accrue PTO while on the unpaid portion of leave. All insurance benefits will remain in place whether on paid or unpaid leave. When on unpaid leave, the employee will be responsible for paying all insurance premiums, if applicable.

**ELIGIBILITY:** This policy applies to all employees eligible for leave under FMLA. An employee who has been employed by CareerSource Pinellas for at least 12 months and has worked at least 1,250 hours during the 12-month period preceding the request for leave is eligible for FMLA leave. Paid or unpaid absences (including workers' compensation, short term disability, and other paid or unpaid time off) prior to taking FMLA leave are not included in the 1,250 work hours reference above.

#### **BASIC LEAVE ENTITLEMENT:**

An eligible employee is entitled to take up to 12 weeks of job-protected FMLA leave for the following reasons:

- ✓ To care for the employee's child after birth, or placement for adoption or foster care;
- ✓ To care for the employee's spouse, son, daughter or parent, who has a serious health condition;<sup>1</sup> or
- ✓ For a serious health condition that makes the employee unable to perform the essential functions of his or her job.

#### **MILITARY LEAVE ENTITLEMENT:**

Eligible employees whose spouse, son, daughter or parent is on covered active duty or call to covered active duty status may use their 12-week FMLA leave entitlement to address certain "qualifying exigencies." Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings.

The FMLA also includes military caregiver leave that permits eligible employees to take up to 26 weeks of leave to care for a covered servicemember during a single 12-month period. A covered servicemember for purposes of military caregiver leave is:

- ✓ A current member of the Armed Forces (including a member of the National Guard or Reserves) who is undergoing medical treatment, recuperation, or therapy, is in

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<sup>1</sup> A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either an oversight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job, or prevents the qualified family member from participating in school or other daily activities. Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity (inability to work) of more than three consecutive calendar days combined with at least two visits to a health care provider or one visit and a regiment of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

outpatient status, or is on the temporary disability retired list, for a serious injury or illness, or

- A veteran of the Armed Forces (including the National Guard or Reserves) discharged within the five-year period before the family member first takes military caregiver leave to care for the veteran and who is undergoing medical treatment, recuperation, or therapy for a qualifying serious injury or illness. A veteran who was dishonorably discharged does not meet the FMLA definition of a covered service member.

#### PAY DURING FMLA LEAVE:

Under the FMLA, family medical leave generally is unpaid. However, CareerSource Pinellas has made provisions for employees to receive pay during FMLA leave under certain circumstances, described below. While third party pay is not considered for leave accrual purposes, PTO is counted for purposes of applying pro-rated leave accruals.

PTO: An employee must use accrued PTO concurrently with FMLA leave.

Short Term Disability (“STD”): An employee may be eligible for STD payments during FMLA leave for his/her own serious health condition, including pregnancy. Employees must apply and be approved for STD. PTO is used during any STD elimination period. STD amounts received may be used to reduce PTO usage as needed to try and equate total gross pay to 100% of base and/or ensure pay sufficient to cover employee’s benefit premiums.

Workers’ Compensation “Lost Time”: FMLA leave runs concurrently with Workers’ Compensation Lost Time if the basis for the Lost Time also meets the definition of a serious health condition under the FMLA. PTO may be used as needed to try and equate total gross pay to 100% of base and/or insure pay sufficient to cover the employee’s benefit premiums.

#### EMPLOYEE BENEFITS DURING FMLA LEAVE AND JOB RESTORATION RIGHTS:

Health Insurance: During an employee's FMLA leave, CareerSource Pinellas will maintain health insurance and other group health benefits on the same conditions as if the employee was working subject to applicable plan documents and law. If the employee wants benefits to continue during FMLA leave, he/she must continue to pay the share of the premiums for those benefits at the same contribution rate as if he/she were an active employee. If any portion of FMLA leave is paid by CareerSource Pinellas, the employee's share of the benefit premiums will be paid through automatic payroll deductions. While on unpaid FMLA leave, all insurance premiums will need to be paid by check, cashier’s check or money order, made payable to CareerSource Pinellas. CareerSource Pinellas’ obligation to maintain health benefits cease if an employee fails to pay his/her share of premiums for which he/she is billed. Under limited circumstances, CareerSource Pinellas may be entitled to recoup costs associated with CareerSource Pinellas’ paid share of the

employee's premiums when an employee fails to return to work for a reason other than a serious health condition. Once FMLA is exhausted, or if an employee is on a non-FMLA leave, benefit continuation will be handled through COBRA at the employee's expense.

**Accrual of PTO during FMLA Leave:** Employees will continue to accrue PTO while on FMLA leave in proportion to the hours of paid leave during the pay period of accrual. PTO will not accrue during unpaid hours of FMLA leave.

**Holidays during FMLA Leave:** Employees will not be paid for holidays that fall during FMLA leave unless the holiday falls on a day covered by PTO accrual.

**Job Restoration:** With the exception of certain key employees, employees who return to work from FMLA leave within or on the business day following the expiration of the leave are entitled to return to their job or an equivalent position with equivalent benefits, pay and other terms and conditions of employment. Employees who do not return to work timely upon the expiration of FMLA leave and who do not have an approved leave extension will be treated as having voluntarily terminated their employment.

**Designation of key employee status and whether such status will affect the employee's right to reinstatement** will be made at the time the employee requests leave, or at the commencement of leave, whichever is earlier, or as soon as practicable thereafter if such determination cannot be made at that time. However, the highest paid 10% of employees are not guaranteed reinstatement if reinstatement will cost CareerSource Pinellas substantial and grievous economic injury. In such cases, CareerSource Pinellas will notify the employee as soon as the determination is made that reinstatement is not available.

**Benefits Accrued Before FMLA Leave:** Use of FMLA leave will not result in the loss of any employment benefit that accrued prior to the start of the leave.

#### FMLA "LEAVE YEAR":

For the purposes of this policy, CareerSource Pinellas uses a "rolling" 12-month period measured backward from the date an employee uses any FMLA leave. Available leave is determined by subtracting the number of weeks of FMLA leave taken during this 12-month "look back" period from the 12-week total allowed. Under the "rolling" 12-month period, each time an employee takes FMLA leave, the remaining leave entitlement would be the balance of the 12 weeks which has not been used during the immediately preceding 12 months. For those currently on FMLA, the prior rolling forward method will not be changed to the rolling back method until 60 days after this policy update. In addition, the transition will take place in such a way that the employees, while on FMLA leave, retain the full benefit of their leave entitlement under whichever method affords him/her greatest benefit. However, as required by regulation, the twelve (12) month period for calculating leave needed to care for a covered military servicemember begins when the employee first starts taking leave and ends twelve (12) months after that date.

## USE OF LEAVE AND SPOUSAL RULES:

An employee does not always need to use FMLA leave in one block. Leave can be taken intermittently or on a reduced leave schedule when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt CareerSource Pinellas' operations. Employees may also take leave due to "qualifying exigencies" (described above) on an intermittent basis. Some additional requirements apply:

- ✓ FMLA leave taken for the birth of a child or placement of a child for adoption or foster care, the entitlement to leave expires twelve (12) months from the date of the child's birth or placement. FMLA leave for time to bond with a newborn child or newly-adopted child is not available on an intermittent or reduced schedule basis unless specifically approved by CareerSource Pinellas.
- ✓ If both spouses work for the CareerSource Pinellas, the combined leave shall not exceed twelve (12) weeks in a twelve (12) month period if the leave is taken for the birth of the employee's child, or to care for the child after birth, for the placement of a child with the employee for adoption or foster care, or to care for the employee's parent with a serious health condition. However, if the leave is taken by either spouse to care for the other who is seriously ill and unable to work, to care for a child with a serious health condition, or for his or her own serious illness, then each employee is eligible for twelve (12) weeks of leave.
- ✓ If both spouses work for CareerSource Pinellas, the combined leave shall not exceed twenty-six (26) weeks of leave during the single twelve (12) month period described above if the leave is taken to care for a covered servicemember with a serious injury or illness.
- ✓ To the extent allowed by law, in the event an absence is for an FMLA qualified reason, CareerSource Pinellas reserves the right to count it as FMLA leave whether the employee has requested FMLA leave or not.

## HOW TO REQUEST FMLA LEAVE AND NOTICE REQUIREMENTS:

Generally, when requesting FMLA leave, employees must be prepared to provide sufficient information for CareerSource Pinellas to determine if the leave is covered by the FMLA and the anticipated timing and duration of the leave. Sufficient information may include the following: whether the employee is unable to perform job functions; whether the employee's family member is unable to perform daily activities; the need for hospitalization or continuing treatment by a health care provider; whether the leave is for a reason for which the employee previously took FMLA leave; and the circumstances supporting the need for military family leave.

More specifically:

- An employee must provide 30 days' advance notice to his or her supervisor of the need to take FMLA leave when the need for leave is foreseeable.
- When 30 days' notice is not possible, the employee must provide notice to his or her supervisor as soon as practicable.

The Human Resources Department ("HR") will inform employees of additional obligations, including the need for a medical certification supporting the need for FMLA leave. HR will also notify the employee as needed for return to work clearance requirements, recertification, new or updated certifications, need for clarification, and similar requirements.

#### CAREERSOURCE PINELLAS' RESPONSIBILITIES:

CareerSource Pinellas will inform an employee requesting FMLA leave whether he or she is eligible under FMLA.

If he or she is eligible, CareerSource Pinellas will notify the employee of any additional information required as well as the employee's rights and responsibilities.

If CareerSource Pinellas determines that the leave is not or would not be FMLA-protected, it will notify the employee and provide a reason for ineligibility.

CareerSource Pinellas will also inform an employee if leave will be designated as FMLA-protected and the amount of leave counted against the employee's FMLA leave entitlement.

#### THE EMPLOYEE'S RESPONSIBILITIES:

The following conduct is strictly prohibited in relation to FMLA leave:

- Failing to follow the absence requirements when absent;
- Engaging in fraud, misrepresentation or providing false information to CareerSource Pinellas or any health care provider;
- Engaging in other employment or any other work activity, whether paid or unpaid, during the leave, without prior written disclosure to HR and approval;
- Failure to comply with the employee's obligations under this policy; and
- Failure to timely return from the leave.

Employees who engage in conduct described above will be subject to loss of benefits, denial or termination of leave and disciplinary action, up to and including termination.

## CAREERSOURCE PINELLAS' COMMITMENT:

CareerSource Pinellas will not interfere with, restrain, or deny the exercise of any right provided by the FMLA, nor will it discharge or discriminate against any individual for opposing any practice or involvement in any proceeding relating to the FMLA.

## QUESTIONS:

Any questions about the FMLA policy should be directed to the Human Resources Department.

### Jury Duty

All regular full-time employees will be granted leave with pay to serve on a jury if summoned. Employees must show the jury duty summons to their supervisor as soon as possible so that arrangements may be made to accommodate their absence. Of course, employees are expected to report for work whenever the court schedule permits. Either CareerSource Pinellas or the employee may request an excuse from jury duty if, in CareerSource Pinellas' judgment, the employee's absence would create serious operational difficulties.

### Military Leave

#### CIVIL AIR PATROL:

- Eligible employees who are members of the Civil Air Patrol will be allowed up to 15 days of unpaid leave annual for the purpose of participating in Civil Air Patrol training or missions. Employees are not required to use accrued PTO but may choose to.
- Employees are eligible for leave if they are senior members of the Florida Wing of the Civil Air Patrol with at least emergency services qualifications and have worked for the company at least 90 days prior to the start of the leave.

## SHORT TERM MILITARY LEAVE:

Employees who are members of the Armed Forces Reserve or National Guard shall be eligible for pay continuation for up to fourteen (14) days per year while they are on active, legally required, short term military service.

- ✓ Employees shall receive the difference between their regular pay and the daily pay provided by the military (less all allowances received for rations and travel).
- ✓ Payment shall be limited to eight hours per day or forty hours per week.
- ✓ His/her National Guard or Reserve Unit must order the employee to temporary active duty. Notification of the orders (oral or written) must be given by the employee to the employee's supervisor unless military necessity prevents such notice or it is otherwise impossible or unreasonable.

## LONG TERM MILITARY LEAVE:

CareerSource Pinellas' policy is intended to conform to the Uniformed Services Employment and Reemployment Rights Act ("USERRA"), which in all cases shall be the guiding principles.

Long Term Military Leave of Absence is interpreted to mean a leave of absence for the purpose of performing active military duty with the United States Armed Forces for a period of 31 or more consecutive days, but not more than five years unless extended involuntarily by law.

- ✓ A leave of absence for military service will be granted to employees who received orders to report for induction or have enlisted in the Armed Forces of the United States.
- ✓ Employees who wish to go on Military Leave status must give written or verbal notice to their supervisor as far in advance as possible.
- ✓ Employees who have served 31 to 180 days of active duty in the ready reserves must notify CareerSource Pinellas of their availability to return to work within 14 days of the date active duty was completed, or if hospitalized as a result of military service up to two years after discharge, in order to be eligible for reinstatement.
- ✓ Employees who serve 181 days or more of active duty must notify CareerSource Pinellas of their availability to return to work within 90 days of their date of completion of active duty to be eligible for reinstatement.
- ✓ Employees must report to their supervisor within 90 days after discharge and present suitable proof that they have completed their training and service in the Armed Forces in a satisfactory manner. They must be eligible for reinstatement under the conditions provided in the USERRA and other applicable legislation.
- ✓ USERRA provides that an employee who leaves a position to enter military service shall be reinstated into the job he/she had or would have held if he/she had remained continuously employed, including promotions and step advancements. If absent for 91 days or greater, all bonuses, financial and advancement opportunities must be offered as if the member never left.
- ✓ Employees returning from Military Leave of Absence will be entitled to such benefits, as they would have had if they had not been on military absence or leave and as provided for by the USERRA.

### Personal Days ("PD")

CareerSource Pinellas shall grant regular full-time employees leaves of absence with pay for four personal days selected by the employee.

- a) The personal days shall be used in the same fiscal payroll year they were gained, between July 1 and June 30 of the next year.
- b) Personal days shall not be cumulative.
- c) Employees will not be paid for unused personal days.
- d) Personal days must be scheduled and approved in advance by the employee's supervisor, except for emergencies).
- e) Personal days should be taken in 4 hour increments at minimum. During an employee's initial year of hire, the number of personal days awarded shall be based on date of hire.
- f) Between July 1 and September 30 .....Four personal days  
Between October 1 and December 31 .....Three personal days  
Between January 1 and March 31 .....Two personal  
Between April 1 and June 30 .....No personal days



### Unpaid Leave of Absence

CareerSource Pinellas may provide an unpaid leave of absence to eligible employees who wish to take time off from work duties to fulfill personal obligations when they are not otherwise entitled to other types of leave provided in this Employee Handbook, such as PTO, STD or FMLA leave.

Unpaid leave may be granted to regular full-time employees for a period deemed appropriate. Requests for unpaid leave will be evaluated based on a number of factors, including anticipated workload requirements and staffing considerations during the proposed period of absence.

Subject to the terms, conditions and limitations of applicable plans, health insurance benefits will be coordinated by CareerSource Pinellas and applicable contributions may be maintained.

Holiday and PTO benefits will be suspended during unpaid leave and will resume upon return to active employment.

When the unpaid leave ends, every reasonable effort will be made to return the employee to the same position, if it is available, or to a similar available position for which the employee is qualified. However, CareerSource Pinellas cannot guarantee reinstatement in all cases.

If an employee needs an unpaid leave of absence, the employee must submit a leave request form to his or her supervisor. This written request, together with any required supporting documentation, must be submitted at least 30 days before the date on which the requested leave is to begin unless the need for a leave is not sufficiently foreseeable to give such notice. In that case, the employee must submit the written request and supporting documentation as soon as practicable. If the leave is foreseeable, the employee shall make a reasonable effort to schedule any planned leave so as not to unduly disrupt CareerSource Pinellas operations. Any unpaid leave of absence, or any extension of such leave, is subject to written approval of the Chief Executive Officer.

If the Chief Executive Officer grants a leave of absence, such leave will begin on the first workday that is missed as a result of the situation requiring the leave. Should the employee request an extension of his or her leave of absence, the employee must furnish his or her supervisor with a written request for an extension, in writing, before the expiration of the original leave of absence or most recent extension.

The Chief Executive Officer may request documentation, including certification by a medical doctor (or other appropriate health care provider), of any circumstances requiring necessitating a leave or extension.

## WORK ENVIRONMENT AND EMPLOYEE CONDUCT

### Absenteeism and Tardiness

Habitual tardiness and excessive absenteeism impacts CareerSource Pinellas' ability to render quality service to its clients; and, therefore, will not be tolerated. Any absence or tardiness, the reason for which is unjustifiable in the opinion of CareerSource Pinellas or is not authorized by law, will be considered an unexcused absence or tardiness. Management has the right to expect that employees will be present and ready for work, when and where they are assigned. CareerSource Pinellas requires reliable performance and will act when the requirement is not met. Unexcused absenteeism or tardiness may lead to disciplinary action, up to and including termination of employment.

Employees are expected to call their immediate supervisor for an immediate (same day) tardy/absence for any reason at least two hours before the start of their workday. Calling in tardy/absent via text messaging is NOT appropriate and will not be considered acceptable notice. Failure to call-in at least two hours before the start of the workday may lead to disciplinary action, up to and including termination of employment.

### Alcohol and Drug-Free Workplace

It is CareerSource Pinellas' desire to provide a drug-free, healthful and safe workplace. To promote this goal, employees are required to report to work in appropriate mental and physical condition to perform their jobs in a satisfactory manner. All employees are required to sign a Drug-Free Workplace Certification Form.

While on CareerSource Pinellas premises and while conducting business-related activities off CareerSource Pinellas premises, no employee may manufacture, distribute, dispense, sell, possess, use or be under the influence of alcohol or illegal drugs. The legal use of prescribed drugs is permitted on the job only if it does not impair an employee's ability to perform the essential functions of the job effectively and in a safe manner that does not endanger other individuals in the workplace.

CareerSource Pinellas' Chief Executive Officer reserves the right to inspect any items on CareerSource Pinellas' premises, including personal property in an employee's possession and to require employees to submit to a drug test within 24 hours to determine the presence of alcohol or illegal drugs in their system.

Violations of this policy may lead to disciplinary action, up to and including immediate termination of employment, and/or required participation in a substance abuse rehabilitation or treatment program. Such violations may also have legal consequences.

Employees are required, as a condition of employment, to notify CareerSource Pinellas of any drug or alcohol-related criminal arrest or charge no later than five days after such arrest or receipt of charge.

Employees with questions or concerns about substance dependency or abuse are encouraged to use the resources of the Employee Assistance Program. They may also wish to discuss these matters or this policy with their supervisor or the Human Resources Department to receive assistance or referrals to appropriate resources in the community, and they may do so without fear of reprisal.

### Appearance Policy

Dress, grooming and personal cleanliness standards contribute to the morale of all employees and affect the business image CareerSource Pinellas presents to clients, employers and the community. CareerSource Pinellas requires a professional appearance in its employees' attitude, communication and attire. All employee clothing must be clean, neat, pressed and project a well-groomed appearance.

Employees must consider their individual schedule/assignment for each day when deciding what to wear to work. In order to project a high level of professionalism, meetings with vendors, clients or other individuals outside of the organization may require a higher standard of dress than what is common for the office. Employees dealing with facilities issues such as a custodian or maintenance employee may be required to wear specific clothing based on the nature of the duties.

Good personal hygiene and personal habits are also very important. Body cleanliness, especially hands and fingernails, is a must. No employee is permitted to wear un-natural hair colors (i.e., blue, green). With the exception of business-appropriate pierced ears and small, inconspicuous nose-piercings, piercings on any other visible part of the body while at work is not permitted. Although tattoos are generally permitted, if any tattoo is deemed inappropriate the employee will be required to cover it.

The following articles and types of clothing cannot be worn in the workplace unless an exception is noted below:

- ✓ Athletic jerseys, tank tops, tube tops, halter tops, backless or bare midriff shirts, shirts with written slogans, expressions or depictions
- ✓ Spandex/Lycra garments, leggings, jeggings, jeans, shorts, sweat pants, running or warm-up suits, workout clothes and overalls or coveralls
- ✓ Underwear as outerwear, excessively tight, provocative or revealing attire or off-the-shoulder garments
- ✓ Wrinkled, stained, ripped or "distressed" clothing
- ✓ Hats, caps, sweatbands and similar headwear
- ✓ Tennis shoes, sneakers, athletic shoes, or flip flops
- ✓ Bull ring, gauge earrings, any other piercings not expressly listed above as acceptable

Please note that the list above is not all inclusive. The purpose of this policy is to ensure a professional work environment. If the Director, along with HR and the CEO, determine that an employee's personal appearance is inappropriate, the employee may be asked to

leave the workplace until the employee is complaint with this policy. Under such circumstances, the employee will not be compensated for the time away from work. Failure to comply with this policy may result in disciplinary action, up to and including termination.

Any employee that requires a reasonable accommodation relating to this policy based on religion, disability or other grounds protected by law should contact HR. Any questions about this policy and/or whether or how it applies to an employee's particular circumstances should also be directed to HR.

### Code of Conduct

In order for any group to work together efficiently and safely, it is necessary to have a reasonable Code of Conduct based on honesty and fair play. If an employee is not considerate of others and does not observe reasonable rules of conduct, disciplinary action may be taken, up to and including termination of employment. Because all persons do not always have the same ideas about good conduct, it is necessary to adopt and enforce certain rules.

We have listed below offenses, which we consider to be serious enough to result in discipline, up to, and including termination of employment. However, this is not meant to be a complete list of such offenses, and the list may be supplemented at any time. Nor is it meant to alter our employment at will status whereby CareerSource Pinellas may decide in its sole discretion to terminate employment of an employee at any time or for any reason, without notice and without any proven violation of this Code of Conduct.

1. Any threatening, intimidating, coercing, harassing, bullying, violent, rude, discourteous or unprofessional behavior, on or off Company premises, which is not protected by Section 7 of the National Labor Relations Act ("NLRA") and which adversely affects the Company's services, operations, property, reputation or goodwill in the community or interferes with work.
2. Violation of policies contained in this Employee Handbook.
3. Unauthorized and unlawful use of any employer-owned or leased equipment, including but not limited to letterhead, computers, phones, cars, e-mail, voice mail, software applications, passwords or access codes.
4. Unauthorized or excessive absence and tardiness.
5. Failure to notify the Company of absence or tardiness consistent with the Company's procedure, including giving 2 hours' notice prior to start time if unable to be at work at the scheduled time.
6. Insubordination, including improper conduct toward a supervisor or client, or refusal to perform tasks assigned by the Company.
7. Reporting to work under the influence of alcohol, illegal drugs, or any other type of substance which creates an intoxicating effect to the extent that it prevents an employee from performing the employee's essential job functions or performing such functions in a safe manner.
8. Release of confidential information about the Company, employees or clients.

9. Theft of any kind or unauthorized removal or possession of property from the Company, co-workers or clients.
10. Altering, falsifying, removal or destruction of any timekeeping record, in any manner including, intentionally recording another employee's time or allowing someone else to record your time.
11. Falsifying, misleading, or making a material omission on your employment application or any other Company record.
12. Misuse, destruction, or not supplying information of any Company property, including intellectual property, such as login and password information.
13. Misusing, destroying or damaging property of the Company, a co-worker, client, or a visitor.
14. The possession of any weapon or dangerous substance (such as mace or pepper spray) on Company property by any employee, including employees who possess a valid concealed weapons license. This does not apply to employees who leave a weapon in their vehicle pursuant to Florida law or to employees authorized by federal or state statute to carry a firearm as a sworn law enforcement officer or first responder.
15. Unsatisfactory job performance of any kind.
16. Violating safety or health rules or practices or engaging in conduct that creates a safety, health or environmental hazard.
17. Sleeping while on duty.
18. Except for meal periods, leaving the Company's premises or your work location without supervisory approval prior to the end of a scheduled work shift.
19. Misuse of the Company's time, including excessive personal phone calls, texts, e-mails, social media use or engaging in any other non-work related activity during work time.
20. Soliciting contributions, accepting donations, gratuities, or support of any amount or kind from clients, salespersons, or supplier representatives, which is not protected by Section 7 of the NLRA, without authorization of management.
21. Failure to maintain a license or certification required for your position.
22. Working off the clock, working overtime without proper authorization and/or failing to record all time worked.

### Driving

CareerSource Pinellas permits select employees to drive vehicles owned, leased or rented by the Company ("company car") to perform work for the Company or on the Company's behalf during their period of employment. Personal use of a company car is not permitted. Personal use includes use for personal errands, commuting to/from work, vacation or weekend use or use by a spouse, dependents or friends. Only those employees who have received written permission from the CEO are authorized to use company cars. All drivers are responsible for using company cars in a safe, lawful and reasonable manner. Any employee who abuses or violates this policy will be subject to disciplinary action, up to and including termination of employment.

## RECORD OF BUSINESS USE:

Employees must maintain records documenting business use of company cars during each month and must provide to the Company by the tenth day of the month following the use a statement for each vehicle used. The monthly statement must include:

- ✓ Which company car(s) the employee used;
- ✓ Beginning and ending odometer readings;
- ✓ The number of miles traveled with the car;
- ✓ Date(s) of business use;
- ✓ Business purpose(s) for the use;
- ✓ Starting and ending location(s) of each drive;
- ✓ Fuel expenses; and
- ✓ Any maintenance expenses.

## FUEL AND MAINTENANCE EXPENSE PROTOCOLS:

CareerSource Pinellas will reimburse expenses for fuel costs, parking fees and tolls associated with company car use under this policy. In addition, CareerSource Pinellas will reimburse for necessary company car maintenance performed with written approval of the CEO.

For any out-of-pocket expenses, drivers may request reimbursement for covered company car costs by completing an expense reimbursement form and submitting the completed form to the Company. All expense reimbursement forms must be signed and verified by the driver. Expense reimbursement forms must include original receipts or other substantiating documentation for each expense showing the:

- ✓ Amount paid;
- ✓ Date the expense was incurred and paid;
- ✓ Vendor or provider name and location;
- ✓ Nature of the expense; and
- ✓ Business purpose.

Drivers must submit expense reimbursement forms to the Company within 60 days of incurring the expense. CareerSource Pinellas reserves the right to refuse any expense reimbursement request that is inaccurate, does not include the appropriate substantiating documentation, is submitted late or otherwise fails to fully comply with the Company's policy, as determined by the Company in its sole discretion. Expense reimbursement forms may be subject to audit by the Company or by government agencies.

CareerSource Pinellas will provide reimbursement promptly following verification of the expense and appropriate substantiation, but in any event, no later than December 31 of the calendar year following the calendar year in which the expense is incurred.

If a driver receives an excess reimbursement, he or she must report and return any excess amounts to the Company within 120 days.

#### ACCOUNTABLE PLAN:

This policy is intended to qualify as an “accountable plan” under the Internal Revenue Code (“IRC”) and relevant Treasury Regulations.

#### PERMISSIBLE USES:

Company cars are available to authorized employees for business purposes. Uses beyond those specified in this policy must be specifically authorized by the CEO.

Nonexempt employees driving company cars for business purposes must record all time spent driving.

#### AUTHORIZED DRIVERS AND PASSENGERS:

Only authorized employees can drive company cars. Employees permitted to drive company cars must have a valid driver's license and active auto insurance. In the event that an authorized driver's license is suspended or revoked, that individual must notify the CEO as soon as possible.

Consistent with relevant background check laws, the Company reserves the right to evaluate the driving record of all company car drivers and revoke driving privileges as necessary.

Transportation of passengers is authorized for business use of company cars, but the number of passengers cannot exceed the number of passenger seats with seat belts available, and passengers may only occupy company cars for purposes authorized by this policy. To the extent that a child will be traveling in a company car, child safety seats must be used and installed in a manner consistent with governing law.

#### SAFETY STANDARDS:

Everyone operating a company car is expected to operate the vehicle in a safe and lawful manner. Safe driving standards include, but are not limited to:

- ✓ Maintaining a reasonable rate of speed;
- ✓ Abiding by traffic signals and signs;
- ✓ Wearing seat belts;
- ✓ Avoiding aggressive and reckless driving;
- ✓ Never driving in unsafe conditions;
- ✓ Never driving when impaired by alcohol, drugs or fatigue;
- ✓ Never texting or e-mailing while driving;
- ✓ Never talking on a cell phone while driving;



- Never listening to headphones while driving; and
- If a company car seems to be unsafe or in need of maintenance, drivers must bring this issue to the attention of the CEO or designee as soon as possible.

In addition, company car drivers must respect the vehicle as company property and take steps to avoid damage to it and its contents, including:

- Keeping property secure, including locked doors, closed windows and properly maintained valuables (including confidential information). Personal items may not be stored in a company car, and personal losses generally will not be reimbursed;
- Never transporting dangerous or flammable materials unless specifically authorized in writing by the CEO;
- Never attaching or pulling trailers or other vehicles;
- Never making after market changes to the car;
- Never picking up hitchhikers; and
- Never transporting items for third parties other than those associated with the Company's business for legitimate business purposes.

In the event of an accident, the driver must stay with the company car and file a police report or otherwise cooperate with the police, as applicable. Employees should not attempt to provide medical care to those involved in an accident beyond their level of suitable training. Company car drivers must communicate the details of the accident to the CEO as soon as possible, and must also communicate theft of company property (including the car itself) and any moving violations.

#### SECTION 409A OF THE INTERNAL REVENUE CODE:

Reimbursements and in-kind benefits under this policy are intended to comply with IRC Section 409A and applicable guidance issued under it or an exemption from the application of Section 409A. Accordingly, all provisions of this policy will be construed in a manner consistent with the requirements for avoiding taxes or penalties under Section 409A. The amount of reimbursements and in-kind benefits provided under this policy in any calendar year will not affect the amount of reimbursements and in-kind benefits provided during any other calendar year and the right to reimbursements and in-kind benefits under this policy cannot be liquidated or exchanged for any other benefit.

Notwithstanding any provision of this policy, the Company will not be liable to any employee for any taxes or penalties imposed under Section 409A on any reimbursements and in-kind benefits under this policy.

#### SAFE DRIVING WHILE AT WORK:

CareerSource Pinellas values the safety and well-being of all employees. Due to the risk of motor vehicle accidents resulting from traffic congestion, unsafe driving habits, road conditions and distraction, the Company's intent is that any person who drives a vehicle while performing official Company business is both qualified to drive under Florida's motor



vehicle laws and has the ability to operate the vehicle in a safe manner. The goal of this policy is to assure employees who drive on Company business have sufficient knowledge, skill and ability to protect themselves, CareerSource Pinellas and the public from an unsafe driver. It is the policy of CareerSource Pinellas that all individuals who drive any vehicle to conduct official Company business must obey all State of Florida laws while driving, must maintain an acceptable driving record and must follow the reporting requirements included within the policy. Failure of any individual conducting business on behalf of the Company to comply with this policy may result in disciplinary action, up to and including termination of employment.

### Ethics

The successful operation and reputation of CareerSource Pinellas is built upon the principles of fair dealing and ethical conduct of our employees. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity. Employees are expected to observe the highest standards of business ethics and are responsible for their role in our Company. Honesty and reliability are very important and we expect to be able to trust each employee. Except as allowed by law, staff members should endeavor to avoid situations where their personal interests may conflict or appear to conflict with Company policy. In general, the use of good judgment, based on high ethical principles, will guide you with respect to lines of acceptable conduct. If a situation arises where it is difficult to determine the proper course of action, the matter should be discussed openly with the Chief Executive Officer.

The continuous success of CareerSource Pinellas is dependent upon our employees' trust and we are dedicated to preserve that trust. Employees owe a duty to the Company and its clients to act in a way that will merit the continued trust and confidence of the public. CareerSource Pinellas will comply with all applicable laws and regulations and expects its employees to conduct business in accordance with the letter, spirit and intent of all relevant laws and to refrain from any illegal, dishonest or unethical conduct.

### CONFLICTS OF INTEREST:

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

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

Personal gain may result not only in cases where an employee or relative has significant ownership in a company with which CareerSource Pinellas does business, but also when an employee or relative receives any kickback, bribe, substantial gift or special consideration as a result of any transaction or business dealings involving CareerSource Pinellas.

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

Compliance with this policy of business ethics and conduct is the responsibility of every employee. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including termination of employment.

#### NEPOTISM AND FAVORITISM:

Employee relatives or non-related members of the employee's household will be considered for employment on an equal basis with other applicants for those positions where neither relative nor non-related household member would be directly or indirectly supervising or checking the work of the other. An employee or appointing authority who has been given authority to appoint, employ (hire), promote or otherwise advance individuals or to recommend individuals for appointment, employment (hire), promotion or advancement in connection with employment is prohibited from appointing, employing, promoting or participating in an interview of any such relative or non-related member of household.

For the purposes of this policy, a relative is defined as spouse, domestic partner, child, step-child, mother, step-mother, father, step-father, brother, step-brother, sister, step-sister, mother-in-law, father-in-law, brother-in-law, sister-in-law, grandparent, grandchild, first cousin, aunt, uncle, niece and nephew. Relatives include any "half-relatives." This policy applies to all relatives, whether by blood or adoption.

- The CEO has the responsibility to review all employee promotions, transfers and offers of employment when the individual considered is related to a CareerSource Pinellas employee, related to a DEO employee assigned to CareerSource Pinellas or is a non-related member of the same household.
- If employees become related through marriage after employment or become members of the same household after employment, the CEO and appropriate supervisor(s) will review their job assignments for conformance with this policy. Depending upon the scope of the respective job assignments, one or both of the relatives or non-related household members may be required to transfer to another department, or, if that is not possible, one of the employees may be asked to resign.
- It is the responsibility of the CareerSource Pinellas employee to inform the appropriate supervisor and CEO of situations when any relative or person who is

a non-related household member has applied for or has been hired into a CareerSource Pinellas position, either regular or temporary.

### Media Contacts

Employees should never speak to the media on the Company's behalf without the CEO's approval. All media inquiries should be forwarded to the CEO. If you are confronted by a reporter or camera person asking for comment about CareerSource Pinellas, it is appropriate to excuse yourself from comment by saying, *"It is our policy that any media requests be handled through the office of the CEO. Let me contact someone for you."*

Permission for the media to photograph, film, record and/or interview non-Company personnel on location may be given only if non-Company personnel are willing and give permission in writing on a CareerSource Pinellas "Consent to Photograph/Film/Record and/or Interview" form, available only through the Human Resources Department. If the media wants to photograph, film, record and/or interview in a Company facility, an announcement should be made in the area(s) where they will be working to notify those in the area who may not wish to be recorded.

### Outside Employment

CareerSource Pinellas respects your right as an individual to conduct your personal affairs without any undue influence. However, we need your best efforts as an employee to have an efficient operation. A full-time job with CareerSource Pinellas is, in our opinion, your primary job. Therefore, any work you might do outside your working hours must not interfere with your work here. Employees will not be granted a modified work schedule to accommodate outside employment. If your performance appears to be affected or if your outside employment represents a conflict of interest, you will be subject to disciplinary action, up to and including termination.

### Personal Data Changes

It is the responsibility of each employee to promptly notify the Human Resources Department of any changes in personal data. Personal mailing addresses, telephone numbers, number and names of dependents, individuals to be contacted in the event of an emergency, educational accomplishments, changes to driver license status should you be required to drive as part of your job and other such status reports should be accurate and current at all times.

### Public Records

Chapter 119 of Florida Statutes, or the Sunshine Law, provides that any records made or received by any public agency in the course of its official business are available for inspection unless specifically exempted or declared confidential by the Florida Legislature. CareerSource Pinellas, by virtue of its history and mission, must comply with the Sunshine Law.

Over the years, the definition of what constitutes “public records” has come to include not just traditional written documents such as papers, maps, and books, but also tapes, photographs, film, sound recordings and records stored in computers, smartphones and the cloud. By way of example, computer records, e-mails, social media entries, tape recordings, text messages, voicemails and instant messages are public records when they are made or received by an employee in connection with official government business and are used to perpetuate, communicate or formalize knowledge.

The Sunshine Law establishes a basic right of access to most meetings of boards, commissions and other governing bodies of state and local governmental agencies or authorities. Under certain circumstances, records of CareerSource Pinellas may or may not be subject to public records requests.

All public records requests shall be handled by the Chief Executive Officer who is the official public records custodian for CareerSource Pinellas. When CareerSource Pinellas receives a public records request, the Chief Executive Officer, or such supervisory personnel as he/she may designate, will acknowledge receipt of the request promptly and then locate the requested records, determine if the records contain confidential or exempt information and redact the records as appropriate. The records will then be made available for inspection and/or copying at any reasonable time, under reasonable conditions and under supervision by the Chief Executive Officer (or designee). Inspection of records may be limited to the hours during which CareerSource Pinellas offices are open to the public.

If the Chief Executive Officer (or designee) asserts that an exemption applies to a part of such record, he or she will redact that portion of the record to which an exemption has been asserted and validly applies and produce the remainder of such record for inspection and copying. If requested, the Chief Executive Officer (or designee) will also state in writing and with particularity the reasons for the conclusion that the record is exempt.

Florida law contains numerous exemptions from inspection or copying of public records. For instance, social security numbers and bank account information of all employees are exempt from disclosure. The Chief Executive Officer (or designee) will refer to Florida law and the Government-In-The-Sunshine Manual to determine if records are exempt from disclosure.

Florida law also provides that certain public records are confidential. For example, medical records of employees are confidential pursuant to Florida Statute Section 112.08(7). If a record is confidential, CareerSource Pinellas will not disclose the entire record (i.e., redaction is not necessary) unless the disclosure of such a record to certain entities or persons is permissible by law.

Prior to filling any requests for materials, the Chief Executive Officer (or designee) will notify the requesting party of any charges, such as actual charges for copies or extensive staff time in locating, reviewing, redacting and copying records.

Any person who submits a public records request is not required to submit such a request in writing, nor is such a person required to provide his or her name or other personal information, sign for the receipt of the records or provide a reason for requesting records. In addition, CareerSource Pinellas employees are not required to give out information from the public records or answer questions about public records. CareerSource Pinellas employees are also not required to create new public records in response to a public records request or reformat the public records.

CareerSource Pinellas employees who have public records in their custody are required to retain such records in accordance with the records retention schedules established by the Florida Department of State. For example, the current record retention schedule provides that administrative correspondence and memoranda, the record category which many e-mails will fall into, must be maintained for three (3) fiscal years. In addition, the current record retention schedule provides that transitory messages, the record category which many e-mails will also fall into, must be retained until obsolete, superseded, or until their administrative value is lost. The records retention schedules, which may be amended from time to time, are currently available online at <https://dos.myflorida.com/library-archives/records-management/general-records-schedules/>. The Chief Executive Officer (or designee) will ensure CareerSource Pinellas' records are retained and destroyed in accordance with Florida law.

### *Political Activities*

No employee of CareerSource Pinellas shall take any active part in a political campaign while on duty or within any period of time during which the employee is expected to perform services for which compensation is received from CareerSource Pinellas. This prohibition against employees taking an active part in any political campaign shall include but not be limited to circulation of or seeking signatures to any petition provided for by any charter or law, distributing badges or other such materials indicating the favoring or opposing of a candidate for election or nomination to a federal, state, county or municipal public office during duty hours or while on CareerSource Pinellas premises.

Nothing in this policy should be deemed to prohibit an employee from expressing his/her personal opinions on any candidate or issue, or from participating in any political campaign during off-duty hours so long as such activities are not in conflict with the law. An employee may also serve as a member of the state executive committee or county executive committee of a political party, but employees are not permitted to perform their committee duties at work.

Employees whose principle employment is in connection with an activity, which is financed in whole or in part by loans or grants, made by the United States or a federal agency are subject to the provisions of the Hatch Act.

## Safety

To assist in providing a safe work environment for employees, clients and visitors, CareerSource Pinellas has established a workplace safety program. CareerSource Pinellas has responsibility for implementing, administering, monitoring and evaluating the safety program. Its success depends on the alertness and personal commitment of all employees. Reports and concerns about workplace safety issues may be made anonymously if the employee wishes. All reports can be made without fear of reprisal.

Employees shall exercise due care in the course of their work to prevent injuries to themselves or other workers and loss of material resources. Each employee shall:

- ✓ Report all unsafe conditions to one's supervisor.
- ✓ Keep work areas clean and orderly at all times.
- ✓ Report all accidents immediately to one's supervisor.
- ✓ Avoid engaging in any horseplay and avoid distracting others.
- ✓ Obey all safety rules and follow work instructions. If any doubt exists about the safety of a job, work shall be stopped until further instructions are received from a supervisor.
- ✓ Operate only machines and equipment for which they have been trained and authorized to use.
- ✓ Use only the prescribed equipment for the job.
- ✓ Wear required protective equipment if working in hazardous areas.

## Smoking

CareerSource Pinellas is committed to protecting the health of our employees and their families. Smoking or other use of tobacco or tobacco products (including but not limited to cigarettes, cigars, pipes, chewing tobacco, dip, snuff, e-cigs and vaping, etc.) is strictly prohibited on all CareerSource Pinellas owned and/or leased locations/premises, including all internal and external areas, parking areas and company vehicles. This policy applies to all Company-sponsored events, regardless of location.

Employees who do not conform to this policy may be subject to disciplinary action, up to and including termination of employment. Contractors or consultants in violation of this policy will be reported to their supervisor at their organization. Visitors found to be in violation of this policy will be politely reminded that CareerSource Pinellas is tobacco-free and asked to dispose of the tobacco product appropriately.

## Social Media

We understand that social media can be a fun and rewarding way to share your life and opinions with family, friends and co-workers around the world. However, use of social media also presents certain risks and carries with it certain responsibilities. To assist you in making responsible decisions about your use of social media, we have established these guidelines for appropriate use of social media. Your failure to adhere to these guidelines may subject you to disciplinary action up to and including termination.



Social media includes all means of communicating or posting information or content of any sort on the internet, including to your own or someone else's web log or blog, journal or diary, personal web site, social networking or affinity web site, web bulletin board or a chat room, whether or not associated or affiliated with the Company, as well as any other form of electronic communication.

The same principles and guidelines found in the Company policies apply to your activities online. Ultimately, you are solely responsible for what you post online. Before creating online content, consider some of the risks and rewards that are involved. Keep in mind that any of your conduct that adversely affects your job performance, the performance of fellow employees or otherwise adversely affects clients or people who work on behalf of the Company or the Company's legitimate business interests, unless authorized by law, may result in disciplinary action up to and including termination. An employee's engagement in protected concerted activities pursuant to Section 7 of the National Labor Relations Act ("NLRA") does not violate this policy.

#### KNOW AND FOLLOW THE RULES:

Carefully read these guidelines and the discrimination and harassment policies, and ensure your postings are consistent with these policies. Postings that include discriminatory remarks, harassment, and threats of violence or similar unlawful conduct will not be tolerated and may subject you to disciplinary action, up to and including termination.

Endeavor to be fair to fellow employees, clients or other people who work on behalf of CareerSource Pinellas. Also, keep in mind that you are more likely to resolve work-related complaints by speaking directly with your co-workers or by utilizing our open door policy than by posting complaints to a social media outlet. Nevertheless, if you decide to post complaints or criticism, avoid using statements, photographs, video or audio that reasonably could be viewed as malicious, obscene, threatening or intimidating, that disparage clients or constitute harassment or bullying. Examples of such conduct might include offensive posts meant to intentionally and unlawfully harm someone's reputation or posts that could contribute to a hostile work environment on the basis of race, sex, disability, religion or any other status protected by law or Company policy.

#### BE HONEST AND ACCURATE:

Make sure you are always honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Remember that the internet archives almost everything; therefore, even deleted postings can be searched. Never post any information or rumors that you know to be false about the Company, fellow employees, clients or people working on behalf of the Company.

## 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.

## **EMPLOYEE DISCIPLINE**

You should be aware that your employment with CareerSource Pinellas is terminable at-will by either party. This means that either you or the Company may decide to end the employment relationship at any time and for any reason not prohibited by law. CareerSource Pinellas will implement appropriate disciplinary action on a case by case basis and maintains sole and absolute discretion to determine the severity of the discipline, including termination of employment.

Unacceptable behavior, which does not lead to immediate discharge, may be dealt with utilizing one of the following forms of discipline:

1. Verbal Warning
2. Written Warning
3. Suspension/Written Record

### **VERBAL WARNING:**

A CareerSource Pinellas designee will meet with you to discuss the problem or violation, making sure that you understand the nature of the problem or violation and the expected remedy. The purpose of this conversation is to remind you of what the rule or performance expectation is and also to remind you that it is your responsibility to meet expectations. The verbal warning will be documented, and a copy will be given to you and will be made a permanent part of your personnel file.

### **WRITTEN WARNING:**

This document will generally indicate the nature of the violation, prior disciplinary actions and an acknowledgement that future violations of this nature will result in further disciplinary action not excluding termination. A copy of the written warning will be given to you and will be made a permanent part of your personnel file.

### **SUSPENSION/WRITTEN RECORD:**

You may be suspended when an infraction requires further investigation by management to determine whether termination of employment is appropriate. If the decision is made not to terminate your employment, then you will be returned to work without pay for the suspension. A written record of the suspension will be made and become a part of your personnel file. If it is determined from the investigation that an unpaid suspension is not appropriate (i.e. the allegations against an employee were serious enough to warrant immediate suspension but the investigation found that the allegations were false or unfounded), then you will be returned to work with pay for the suspension and the suspension will not become a part of your personnel file.

The provision of different forms of discipline in this policy is not a guarantee of their use or consideration.

CareerSource Pinellas reserves the right to terminate employment at any time, with or without reason, at its sole discretion. Similarly, CareerSource Pinellas applies the foregoing forms of discipline at its sole discretion and on a case by case basis. CareerSource Pinellas also reserves the right to take legal action against any employee.

## PROBLEM RESOLUTION

CareerSource Pinellas is committed to providing the best possible working conditions for its employees. Part of this commitment is encouraging an open and frank atmosphere in which any problem, complaint, suggestion, or question receives a timely response from CareerSource Pinellas supervisors and management.

CareerSource Pinellas strives to ensure fair and honest treatment of all employees. Supervisors, managers and employees are expected to treat each other with mutual respect. Employees are encouraged to offer positive and constructive criticism.

If employees disagree with established rules of conduct, policies or practices, they can express their concern through the problem resolution procedure. No employee will be penalized, formally or informally, for voicing a concern with CareerSource Pinellas in a reasonable, business-like manner, or for using the problem resolution procedure.

If a situation occurs where an employee believes that a condition of employment or a decision affecting them is unjust or inequitable, they are encouraged to make use of the following steps. The employee may discontinue the procedure at any step.

1. Within seven (7) days of the event giving rise to the employee's concern, the employee must make a written complaint to the Company's Human Resources Business Partner. The Human Resources Business Partner 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 employee. The employee 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 employee 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 employee, seeking other information or documents, or requesting the assistance of another internal or outside investigator. Within thirty (30) business days of the CEO's meeting with the employee, the CEO shall make a final decision and communicate that decision to the employee. 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 employee's direct supervisor or if the complaining employee 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.

Not every problem can be resolved to everyone's total satisfaction, but only through understanding and discussion of mutual problems can employees and management develop confidence in each other. This confidence is important to the operation of an efficient and harmonious work environment and helps to ensure everyone's job security.

## EMPLOYEE HANDBOOK **ACKNOWLEDGMENT**

I acknowledge that I have received a copy of the Company's Employee Handbook. I understand that the policies contained in the Employee Handbook contain important information about the Company; general personnel policies and information about my obligations as an employee. I will remain familiar with and agree to abide by these policies.

I understand that the provisions of this Employee Handbook are guidelines and do not establish a contract or any particular terms or conditions of employment between the Company and myself. None of the policies constitute or are intended to constitute a promise of employment. I further understand that the Company may periodically, at its discretion, change, rescind, or add to any policies, benefits or practices with or without prior notice.

I understand that my employment relationship with the Company is "at-will" and is based upon the mutual consent of the Company and myself. Accordingly, I agree that the Company or I may terminate the employment relationship at any time and for any reason, with or without prior notice or discipline.

I specifically acknowledge that I have received and reviewed the Equal Opportunity, Discrimination, Harassment, Retaliation and Related Conduct Policy. I understand the Company's complaint procedure under this Policy.

I specifically acknowledge that I also have received, reviewed and agree to the Company Car Policy. I understand and hereby consent to the Company obtaining information from any department of motor vehicles or other agency or person about me and my driving records.

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

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Employee's Name Printed

(PLEASE SIGN AND RETURN TO THE COMPANY FOR PLACEMENT IN PERSONNEL FILE)



## **ACTION ITEM 4**

### **Approval of ITA Cap Decrease**

CareerSource Pinellas WIOA Training, Supportive Services and Needs-Related Payments policy update.

#### **Highlighted Changes:**

- Tuition caps decrease from \$7,500/year, \$15,000/lifetime to \$5,000/year, \$10,000/lifetime.
- CareerSource Pinellas (CSPIN) along with 21 other LWDBs received a reduction in overall funding for PY'23 - 24.
- This will allow CSPIN to continue supporting training needs effectively while being able to serve an additional number of eligible candidates.
- CareerSource Tampa Bay recently reduced their ITA tuition cap to \$5,000 annually and lifetime.

#### **RECOMMENDATION**

Approval of the updated WIOA 23-01 Training, Supportive Services and Needs-Related Payments Policy.



 <p style="text-align: center;"><b>Policy</b></p>		<p style="text-align: center;"><b>Policy Number</b> WIOA 22-01</p>
<b>Title:</b>	Training, Supportive Service and Needs-Related Payments	
<b>Program:</b>	Workforce Innovation and Opportunity Act	
<b>Effective:</b>	July 13, 2023; <u>Update September 13, 2023</u>	

## I. PURPOSE AND SCOPE

The purpose of this policy is to provide CareerSource Pinellas (CSP) staff with information and requirements for supportive services and needs-related payments to eligible Workforce Innovation and Opportunity Act (WIOA) program participants. This policy also communicates the funding limits for these services, as well as for ITA training activities. Local Operating Procedures to guide the provision of WIOA supportive service and need-related payments are provided in a separate document.

## II. BACKGROUND

A key principle in WIOA is to provide local areas with the authority to make policy and administrative decisions and the flexibility to tailor the public workforce system to the needs of the local community. To ensure maximum flexibility, WIOA regulations allow local areas the discretion to provide the supportive services they deem appropriate, subject to the conditions prescribed by WIOA. This policy requires coordination with other entities to ensure non-duplication of resources and services and establishes the limits on the amount and duration of supportive and training services.

## III. AUTHORITY

Workforce Innovation and Opportunity Act, Public Law (WIOA) Sections [3\(59\)](#); [106\(c\)\(1\)\(F\)](#); [133\(b\)\(2\)\(B\)](#); [133\(b\)\(3\)](#); [134\(c\)\(3\)](#); [134\(d\)\(3\)](#); [134\(d\)\(4\)](#); [134\(c\)\(1\)\(A\)\(ii\)](#); [134\(c\)\(1\)\(A\)\(iii\)](#) 20 Code of Federal Regulations (CFR) Subpart G; [681.570](#); [681.640](#)

Training and Employment Guidance Letter (TEGL) [19-16](#) and [21-16](#)

## IV. POLICY

### A. ITA Training Payment Limits

WIOA offers classroom training and tuition assistance for programs provided by approved training institutions on the Eligible Training Provider List (ETPL). The training program can be up to two years or be the last two years of an extended training program. WIOA contributions for all Individual Training Account (ITA) training cannot exceed ~~\$7,500~~\$5,000 per program year, or ~~\$15,000~~\$10,000 in a participant's lifetime. The training limit includes all costs of ITA training (tuition, books, uniforms, tools, ~~exam~~exam, and license fees, etc., as required for the training program).

Budgets established prior to September 13, 2023 will be grandfathered at the previous \$7,500 annual and \$15,000 lifetime cap amounts.

### B. Supportive Services for Adults, Dislocated Workers and Youth

Supportive services are services that are necessary to enable an individual to successfully participate in activities authorized under WIOA. Services may include, but are not limited to:

- 1) Linkages to community services
- 2) Assistance with transportation
- 3) Assistance with childcare and dependent care
- 4) Assistance with housing
- 5) Needs-related payments, as described in **Section IV.C.** below
- 6) Assistance with educational testing
- 7) Reasonable accommodations for individuals with disabilities
- 8) Legal aid services
- 9) Referrals to health care
- 10) Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear
- 11) Assistance with books, fees, school supplies and other necessary items for students enrolled in postsecondary education classes
- 12) Payments and fees for employment and training-related applications, tests, and certifications.

Supportive services may only be provided to adults, dislocated workers or youth who are participating in career or training services authorized under WIOA sections 129(c)(2) or 134(c)(2)-(3) and who are unable to obtain supportive services through other programs providing such services.

CSP staff must ensure adults and dislocated workers are provided accurate information about the availability of supportive services in the local area, as well as referral to such activities.

Note: Supportive services must not be used as incentive payments. Incentive payments are allowable for youth participants only, and unlike supportive services, are permitted for recognition of achievements directly tied to training activities and work experiences.

## **1. Determination of Need**

As supportive services are not an entitlement, staff must first determine a participant to be in financial need of supportive services before they are provided. Supportive services should be used to address the participant's barriers identified through the initial or objective assessment process. The plan for addressing these barriers, to include the provision of supportive services, must be documented in the participant's Individual Employment Plan (IEP) or Individual Service Strategy (ISS), as appropriate. See Supportive Services Local Operating Procedures for the correct process to determine and document supportive services and needs-related payments.

## **2. Limits to the Amount or Duration of Supportive Services**

Limits established by the Local Workforce Development Board on the provision of supportive services.

All supportive services required for ITAs (including books, exams, applications, certifications, uniforms, and tools) count in the training limit of ~~\$7,500~~\$5,000 per year and ~~\$15,000~~\$10,000 per lifetime. Transportation, emergency support, needs-related payments, and other types of supportive service that are not required for the training program, do not count in the training limit.

The following limits apply to Welfare Transition and WIOA participants:

Category	Type of Supportive Service	Supportive Services Limit	Method of Payment
Transportation	Transportation, mileage reimbursement*	<ul style="list-style-type: none"> <li>\$100 max per month</li> </ul>	Reloadable Visa Cards
Emergency	To fit the unique need of the participant/situation	<ul style="list-style-type: none"> <li>Request must be approved by CEO or designee</li> </ul>	
Training and Employment Related Needs	Uniforms	<ul style="list-style-type: none"> <li>As required, in writing, for curriculum and included in ITA, or up to \$200 as needed for OJT, apprenticeship, etc.</li> </ul>	Direct Payment to Vendor
	Tools	<ul style="list-style-type: none"> <li>As required, in writing, for curriculum and included in ITA, or up to \$500 as needed for apprenticeship or OJT, etc.</li> </ul>	Direct Payment to Vendor
	Books, fees, supplies, and other items required for training	<ul style="list-style-type: none"> <li>As required, in writing, for training and included in ITA</li> </ul>	Direct Payment to Vendor

	Training related testing, fees, applications, certifications, etc.	<ul style="list-style-type: none"> <li>As required, in writing, for training and included in ITA</li> </ul>	Direct Payment to Vendor
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\*Reimbursement rate is defined in the CareerSource Florida Business Travel Reimbursement guidelines for Board Members and Staff.

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## **C. Needs-Related Payments**

Needs-related payments are a supportive service that provides financial assistance to participants to enable their participation in training. Unlike other supportive services, LWDB 14 may only provide needs-related payments to eligible WIOA participants who are enrolled in training or accepted in a training program that will begin within 30 calendar days.

### **1. Eligibility for Adults, Dislocated Workers and Out-of-School Youth (OSY)**

To receive needs-related payments, adults and OSY (ages 18-24) must:

- a) Be unemployed;
- b) Not qualify for, or have ceased qualifying for, Reemployment Assistance (RA) benefits; and
- c) Be enrolled in training services authorized under WIOA sec. 134(c)(3).

To receive needs-related payments, dislocated workers must be unemployed, and:

- a) Have ceased to qualify for RA benefits or Trade Readjustment Allowance (TRA) under the Trade Adjustment Assistance (TAA) program; and
- b) Be enrolled in training services authorized under WIOA sec. 134(c)(3) by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the eighth week after the worker is informed that a short-term layoff will exceed six months; or
- c) Be unemployed, deemed ineligible for RA benefits or TRA under the TAA program, and be enrolled in training services authorized under WIOA sec. 134(c)(3).

\*All needs-related payments must be approved by the CEO or designee.

### **2. Payment Levels**

- a) For Adults and OSY, the LWDB established the payment level of needs-related payments not to exceed \$275 per week. For statewide projects, the payment level must be established by the State Workforce Development Board.
- b) For dislocated workers, the payment level of needs-related payments must not exceed the greater of:
  - i. The applicable weekly level of RA benefits for participants who were eligible for RA benefits, or
  - ii. The poverty level for an equivalent period, for participants who did not qualify for unemployment compensation because of the qualifying layoff. The weekly payment level must be adjusted to reflect changes in total family income.

Note: Waivers to training, supportive services, and the option to provide emergency or needs-related payments may be requested on a case-by-case basis. A waiver must be approved by the CEO or designee with record of waiver retained within the participant's Employ Florida record.

## **V. RESOURCES**

- Workforce GPS – Youth Connections, Community Resources, Supportive Services
- CareerSource Florida Supportive Service and Needs-Related Payment Policy 109

Staff must follow their program's Local Operating Procedures when providing any supportive service.

DRAFT



## **ACTION ITEM 5**

### **One-Stop Committee Duties, Responsibilities & Goals for PY'2023 - 2024**

The following represents the Duties and Responsibilities of the One-Stop Committee taken from the Organization's bylaws:

#### **SECTION 5 – One Stop Committee Membership, Duties and Responsibilities**

The One Stop Committee shall be chaired by a Board Member appointed by the Board Chair and shall consist of those members deemed appropriate and appointed to the committee by the One Stop Committee Chair. The One Stop Committee shall be responsible for advising the Board of Directors on matters related to the following committee areas of oversight:

- Providing assistance with planning, operational and other issues relating to the one- stop delivery system;
- Providing assistance with planning, operational, and other issues relating to the provision of services to youth;
- Providing assistance with planning, operational and other issues relating to the provision of services to individuals with disabilities;
- Reviewing the plans and services of other agencies and one-stop partners with the intent to improve coordination of services;
- Reviewing customer survey feedback to ensure customer input is made part of the plan of service;
- Reviewing the enrollment and training of individuals under the Workforce Investment Act;
- Reviewing the services delivered to welfare transition customers;
- Reviewing services and programs delivered to recognized target groups;
- Reviewing the operation and performance of any grants or other funding received;
- Reviewing periodic reports on performance in accordance with the committee's annual strategic plan; and
- Planning for future changes and improvements to the one-stop system.





## **ACTION ITEM 5 (cont.)**

### **One-Stop Committee Duties, Responsibilities & Goals for PY'2023 - 2024**

Based upon the above bylaws, the Committee is being asked to develop Goals for 2023-2024. Some of the potential goals may be:

1. One-stop Delivery system:
  - a. Increase traffic by 20% in career centers, while continuing to offer quality virtual services.
  - b. Increase participation in workshops by 20%.
  - c. Increase the number of EF participants by 10%
2. Youth:
  - a. Meet required WIOA metrics of 20% paid work experience and 50% of Out-of-School Youth.
  - b. Meet or exceed 90% of negotiated performance goals for Credential Attainment Rate (84.1%) and Measurable Skill Gains (65%).
3. Provision of Services to individuals with Disabilities:
  - a. Increase services to individuals with disabilities by 20%.
4. Training of Individuals under the Workforce Innovative Opportunity Act:
  - a. Meet required WIOA metrics of 35% for Individual Training Account (ITA) expenditures for both WIOA Adult and WIOA Dislocated Workers.
  - b. Meet or exceed 90% of negotiated performance goals for Credential Attainment Rate (87%) and Measurable Skill Gains (65%) for WIOA Adults.
  - c. Meet or exceed 90% of negotiated performance goals for Credential Attainment Rate (86.5%) and Measurable Skill Gains (65%) for WIOA Dislocated Workers.
  - d. Increase the number of job placements for WIOA participants by 10%.
5. Welfare Transition Customers:
  - a. Ensure at least 5% of Welfare Transition customers successfully complete at least one Florida Ready to Work credential.
  - b. Co-enroll 5% of Welfare Transition customers into WIOA Title II and Title IV programs.
6. Services and Programs delivered to recognized target groups:
  - a. Increase the number of Second Chance employers by 10%.
  - b. Increase the number of job assisted job services to veterans by 15%.
  - c. Increase the number of veterans participating in workshops by 10%.
  - d. Increase the number of employer outreach for veterans by 10%

## **RECOMMENDATION**

Motion to approve the above goals for the One-Stop Committee for PY'23 – 24.



## ACTION ITEM 6

### Training Provider Renewal - FleetForce

CareerSource Pinellas enters into individual training provider agreements with each approved training provider. These agreements have previously been administered annually with a two year renewal period contingent upon Workforce Solutions Committee and Board of Directors approval. Training providers are also annually required to:

- Provide most recent Florida Education & Training Placement Information Program (FETPIP) Reports to include: enrollment, completion, retention, employment rates of students.
- Provide Training Provider Renewal Application.
- Provide Program Cost details (tuition, books, supplies and testing fees) and a copy of current catalog and schedule or website link with required information.
- Provide a copy of a valid license from the Commission for Independent Education (CIE).
- Provide current Liability Insurance with CareerSource Pinellas listed.
- Provide a copy of completed W-9 form.
- Remain in compliance with performance, financial and other mandated requirements.

FleetForce submitted all required documents for the two year renewal. FleetForce offers CDL Class A and CDL Class B training to eligible individuals.

Program – Course # - Type of Degree or Certificate	Books & Supplies	Tuition & Fees	Total Cost	Duration Of Training	Completion Rate	Average Wage At Placement	Retention Rate
Class A CDL	Included	\$6,995	\$6,995	160 hours	95%	\$25	78%
Class B CDL	Included	\$2,995	\$2,995	40 hours	86%	\$22	98%

### RECOMMENDATION

Approval of a two year renewal for FleetForce (9/1/23-8/30/25). This training provider has completed the initial one year term and is in eligible status for the two year renewal.



## ACTION ITEM 7

### Approval of New Training Provider ATA Career Education College

7351 Spring Hill Drive, Suite 11, Spring Hill, FL 34606

ATA Career Education College is seeking initial training provider approval. They are licensed by Commission for Independent Education by means of accreditation.

### Courses/Certificate/Diploma Programs

Program	Books & Supplies	Tuition & Fees	Total Cost	Duration Of Training	Completion Rate	Average Wage at Placement	Employed after Completion
Dental Assist	\$1,822	\$15,080	\$17,752	1070 Clock Hours	54%	\$17.09	84%
Medical Assisting - Diploma	\$2,779	\$13,395	\$17,024	1055 Clock hours	54%	\$13.97	85%
Medical Assisting - Associate of Science	\$4,930	\$21,385	\$27,765	1065 Clock Hours	67%	\$13.97	100%
Pre-Licensure Practical Nursing - Diploma	\$2,647	\$30,420	\$36,017	1658 Clock Hours	71%	\$19.43	84%

- Years in operation: 11 years
- Total enrollments current year: 403
- 181 still in the programs
- Current approval from CareerSource Pasco/Hernando, CareerSource Polk, and CareerSource Citrus, Levy, Marion

### RECOMMENDATION

Approval to add ATA Career Education College programs to the Eligible Training Provider List (ETPL).



## **ACTION ITEM 8**

### **Workforce Solutions Committee Duties, Responsibilities & Goals for PY'2023 - 2024**

The following represents the Duties and Responsibilities of the Workforce Solutions Committee taken from the Organization's bylaws:

#### **SECTION 6 – Workforce Solutions Committee Membership, Duties and Responsibilities**

The Workforce Solutions Committee shall be chaired by a Board member appointed by the Board Chair and shall consist of those members deemed appropriate and appointed to the Committee by the Workforce Solutions Committee Chair. The Workforce Solutions Committee shall be responsible for:

- Reviewing and recommending approval of the services and programs delivered to employers;
- Reviewing and recommending approval of training vendor applications and other actions pertaining to training vendors;
- Reviewing periodic training vendor performance reports;
- Reviewing the region's activities related to targeted industries;
- Creating and maintaining the regional targeted occupations list; and
- Reviewing and recommending approval of the Board's partnerships with economic development organizations and other business associations in accordance with the committee's annual strategic plan.



## **ACTION ITEM 8 (cont.)**

### **Workforce Solutions Committee Duties, Responsibilities & Goals for PY'2023 - 2024**

Based upon the above bylaws, the Committee is being asked to develop Goals for 2023-2024. Some of the potential goals may be:

#### **1. Services to Employers:**

- a. Increase business engagement by 25% compared to program year 2022-2023
- b. Increase referral of qualified job seekers to open job orders by 15%
- c. Increase the number of Direct Placements and Obtained Employments entered in EF by 15%

#### **2. Approval of Training Providers:**

- a. Approve at least 4 new training providers during 2023-2024 to expand training options and customer choice.

#### **3. Targeted Industries:**

- a. Host Industry Roundtables, one per quarter minimum, for in-demand industries (e.g., Information Technology, Healthcare, Hospitality and Manufacturing) in compliance with REACH Act Industry Consortium requirements.
  - i. Awaiting guidance from CareerSource Florida; guidance expected to be approved at their September board meeting.

#### **4. Regional Targeted Occupation List:**

- a. New occupations will be reviewed and approved as need arises.

#### **5. Economic Development Organizations and Business Associations:**

- a. CareerSource Pinellas will present at least 4 times per quarter to various associations and Economic Development agencies.

## **RECOMMENDATION**

Motion to approve the above goals for the Workforce Solutions Committee for PY'23 – 24.



## **ACTION ITEM 9**

### **Fiscal Year 2023 – 2024: Budget Modification No. 1**

#### **REVENUE**

Total budgeted revenues estimated to decrease from \$10,331,022 to \$9,496,655 for an overall decrease of \$834,367; or 8.1%.

#### **Workforce Innovation and Opportunity Act (WIOA) Programs**

- WIOA Adult - \$<550,000>
  - Decrease funding from Department of Commerce and strong spending in 2022-2023 resulting in less funds available for current year funding
    - WIOA Adult enrollments temporarily closed
    - Individual Training Account (ITA) caps for individuals being reduced to \$5,000 annually and \$10,000 lifetime; down from \$7,500 and \$15,000, respectively.
- WIOA Youth - \$<183,000>
  - Decrease funding from Department of Commerce
- Get There Faster Grant - \$<119,110>
  - Strong spending in 2022-2023 resulted in fewer funds carried-over to 2022-2023. Budgeted amount represents remaining funds of \$750,000 grant.
- HOPE Initiative grant - \$128,125
  - New funding for 2023-2024 awarded from Department of Commerce for a collaboration between the CareerSource Florida network and the Florida Department of Children and Families to help Floridians achieve self-sufficiency through employment, training and support services.

#### **Employment Services**

- HOPE Navigator - \$89,687
  - New grant awarded from Department of Commerce to fund dedicated headcount to facilitate the HOPE Initiative grant.
- Wagner Peyser - \$50,000
  - Increased funding from Department of Commerce

#### **Temporary Assistance for Needy Families**

- Welfare Transition - \$<250,000>
  - Decreased funding from Department of Commerce



## **ACTION ITEM 9 (cont.)**

### **Fiscal Year 2023 – 2024: Budget Modification No. 1**

#### **EXPENSES**

Total budgeted expenses estimated to decrease from \$10,260,572 to \$9,426,205 for an overall decrease of \$834,367.

#### **Personnel Expenses**

- Personnel Expenses expected to decrease \$<329,600>, or 6.3% from original budget.
  - Employee terminations/resignations over the last couple of months not re-filled due to decreased funding
  - New HOPE Navigator position will be filled internally

#### **Program Expenses**

- Service Provider Contracts - \$65,000
  - Original budget was \$500,000; now \$560,000
  - New Youth Service Provider, SailFuture, contract was negotiated at \$419,000
  - Remaining funds due to no cost extension for Pinellas Education Foundation; didn't spend all contracted funds by 6/30/2023
- Training - \$<336,000>
  - Get There Faster training decreased (\$100,000) due to fewer funds carried-over to 2023-2024
  - WIOA Adult/Dislocated training (interchangeable) decreased (\$200,000) due to lower funding for 2023-2024
  - WIOA Youth training decreased (\$36,000) due to lower funding for 2023-2024
- Work-based Learning - \$<115,000>
  - Welfare Transition Summer PAYS decrease (\$25,000) for 2024 summer program due to decreased funding
  - WIOA Adult/Dislocated work-based learning decrease (\$90,000) due to lower funding for 2023-2024

#### **Other Expenses**

- Computer Software - \$<55,500>
  - Management decision not to renew SARA; texting software used to automatically follow-up with participants. Will now require career counselors to personally reach out and follow-up with customers.

#### **RECOMMENDATION**

Staff recommends approval of adjustments to the revenue budgets and resultant modifications to the expenditures budgets.



# CareerSource Pinellas

## 2023-2024 Planning Budget

### Budgeted Revenues

Funding Streams	Approved Revenue Budgeted for 2023-2024	Proposed Modifications	Proposed 2023-2024 Budget Modification I
<b>Workforce Innovation &amp; Opportunity Act</b>			
Adult	1,700,000	(550,000)	1,150,000
Dislocated Worker	1,750,000	-	1,750,000
	<b>3,450,000</b>	<b>(550,000)</b>	<b>2,900,000</b>
Youth	1,583,069	(183,069)	1,400,000
Rapid Response	100,000	-	100,000
HOPE Funding Initiative	-	128,125	128,125
Get There Faster Low Income Returning Ad.	400,000	(119,110)	280,890
<b>Total WIOA</b>	<b>5,533,069</b>	<b>(724,054)</b>	<b>4,809,015</b>
<b>Employment Services</b>			
Wagner-Peyser	800,000	50,000	850,000
Veterans Services	144,000	-	144,000
Recovery Navigator	100,000	-	100,000
Apprenticeship Navigator	65,000	-	65,000
HOPE Navigator	-	89,687	89,687
RESEA	425,000	-	425,000
<b>Total Employment Services</b>	<b>1,534,000</b>	<b>139,687</b>	<b>1,673,687</b>
<b>Welfare Transition</b>	<b>2,400,000</b>	<b>(250,000)</b>	<b>2,150,000</b>
<b>Supplemental Nutrition Assistance Program</b>	<b>400,000</b>	<b>-</b>	<b>400,000</b>
<b>Trade Adjustment Assistance</b>	<b>10,000</b>	<b>-</b>	<b>10,000</b>
<b>TOTAL DEO</b>	<b>9,877,069</b>	<b>(834,367)</b>	<b>9,042,702</b>
<b>State of Florida - Transition Funding</b>	<b>309,553</b>		<b>309,553</b>
<b>Other Revenue</b>			
Ticket to Work	100,000	-	100,000
Tobacco Free Florida	2,400	-	2,400
Interest	42,000	-	42,000
<b>TOTAL NON-DEO</b>	<b>144,400</b>	<b>-</b>	<b>144,400</b>
<b>TOTAL 2023-2024 BUDGETED REVENUE</b>	<b>10,331,022</b>	<b>(834,367)</b>	<b>9,496,655</b>





**CareerSource Pinellas**  
**2023-2024 Planning Budget**  
**For the Year Ended June 30, 2024**

		<b>Approved 2023-2024 Planning Budget</b>	<b>Proposed Modificatons</b>	<b>Proposed 2023-2024 Budget Modification I</b>
<b>G/L</b>				
<b>Revenue</b>				
<b>Operating Revenue</b>				
<b>Grant Revenue</b>				
Grant Revenue - Federal	3000	9,877,069	(834,367)	9,042,702
Grant Revenue - State	3001	309,553	-	309,553
Grant Revenue - Local	3002	-	-	-
<b>Total Grant Revenue</b>		<b>10,186,622</b>	<b>(834,367)</b>	<b>9,352,255</b>
<b>Contributions</b>				
Corporate Revenue	3100	2,400	-	2,400
Sponsorship Revenue	3101	-	-	-
Donations	3102	-	-	-
<b>Total Contributions</b>		<b>2,400</b>	<b>-</b>	<b>2,400</b>
<b>Program Revenue</b>				
Ticket to Work Revenue	3103	100,000	-	100,000
Program Revenue	3502	-	-	-
<b>Total Program Revenue</b>		<b>100,000</b>	<b>-</b>	<b>100,000</b>
<b>Investement Income</b>				
Interest/Dividends	3200	42,000	-	42,000
Unrealized Gain/Loss	3201	-	-	-
<b>Total Investement Income</b>		<b>42,000</b>	<b>-</b>	<b>42,000</b>
<b>Other Income</b>				
Other Revenues	3300	-	-	-
Gain <Loss> on Sale/Disposal	5703	-	-	-
<b>Total Other Income</b>		<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Revenue</b>		<b>10,331,022</b>	<b>(834,367)</b>	<b>9,496,655</b>
<b>Expenditures</b>				
<b>Personnel Expenses</b>				
Salary Expense	5000	3,783,672	(267,558)	3,516,114
Salary Expense - Benefit Stipend	5005	830,280	(70,238)	760,042
Payroll Taxes	5050	358,860	(27,238)	331,622
Fringe Benefits (ER Paid)	5060	40,860	-	40,860
Retirement	5090	226,071	(18,583)	207,488
<b>Total Personnel Expenses</b>		<b>5,239,743</b>	<b>(383,617)</b>	<b>4,856,126</b>
<b>Program Expenses</b>				
Operating Supplies	5303	-	-	-
Food and Beverages	5310	4,200	-	4,200
Communications	5500	95,520	-	95,520
Outreach/Marketing	5520	35,400	-	35,400
Service Provider Contract	8000	500,000	65,000	565,000
One-Stop Operator	8100	48,000	-	48,000
Internal Monitoring	8200	68,000	-	68,000



**CareerSource Pinellas**  
**2023-2024 Planning Budget**  
**For the Year Ended June 30, 2024**

	<b>G/L</b>	<b>Approved 2023-2024 Planning Budget</b>	<b>Proposed Modificatons</b>	<b>Proposed 2023-2024 Budget Modification I</b>
OJT	8300	945,000	(115,000)	830,000
Paid-Work Experience	8320	120,000	-	120,000
DW Work Experience	8325	-	-	-
Apprenticeships	8330	-	-	-
Contracted Workforce Services	8335	24,000	-	24,000
Youth Stipends	8340	16,500	-	16,500
Other Customer Support Services	8341	25,200	-	25,200
Customer Training	8342	1,474,000	(336,000)	1,138,000
Customer Supportive Services	8343	18,000	-	18,000
Licensures	8344	-	-	-
Training Related Material	8345	48,600	-	48,600
Fees/exams/certifications	8346	25,200	-	25,200
<b>Total Program Expenses</b>		<b>3,447,620</b>	<b>(386,000)</b>	<b>3,061,620</b>
<b>Professional Fees</b>				
Accounting/Audit Fees	5100	56,250	-	56,250
Legal Fees	5101	96,000	-	96,000
Legal (Lobbying)	5105	25,000	-	25,000
Professional Service	5104	85,920	-	85,920
Contract Labor	5170	131,800	-	131,800
Contract IT Services	5171	245,340	-	245,340
Cybersecurity - IT	5172	47,160	-	47,160
<b>Total Professional Fees</b>		<b>687,470</b>	<b>-</b>	<b>687,470</b>
<b>Supplies</b>				
Office Supplies	5302	22,450	-	22,450
Postage/Shipping	5307	3,300	-	3,300
Document Shredding	5308	1,404	-	1,404
<b>Total Supplies</b>		<b>27,154</b>	<b>-</b>	<b>27,154</b>
<b>Insurance</b>				
Insurance - Commercial Property	5400	9,000	-	9,000
Insurance - General Liability	5401	77,000	-	77,000
Insurance - Workers Comp	5403	34,054	-	34,054
Insurance - Auto	5404	-	-	-
Insurance - Claims	5405	-	-	-
<b>Total Insurance</b>		<b>120,054</b>	<b>-</b>	<b>120,054</b>
<b>Occupancy</b>				
Office Rent/Lease	5200	256,415	-	256,415
Other Leases	5201	-	-	-
Utilities	5202	36,700	-	36,700
Repairs & Maintenanac	5203	4,680	-	4,680
Security	5204	468	-	468
Janitorial Expense	5205	39,780	-	39,780
Pest Control	5206	2,580	-	2,580
<b>Total Occupancy</b>		<b>340,623</b>	<b>-</b>	<b>340,623</b>
<b>Office Equipment</b>				



**CareerSource Pinellas**  
**2023-2024 Planning Budget**  
**For the Year Ended June 30, 2024**

		<b>Approved 2023-2024 Planning Budget</b>	<b>Proposed Modificatons</b>	<b>Proposed 2023-2024 Budget Modification I</b>
	<b>G/L</b>			
Equipment Rent/Lease	5300	24,012	-	24,012
Copy Machine Usage/Maintenance	5301	9,000	-	9,000
Comp Software/License/Maintenance	5304	166,577	(55,500)	111,077
Equipment < \$5,000	5305	18,000	-	18,000
Other	5207	-	-	-
<b>Total Office Equipment</b>		<b>217,589</b>	<b>(55,500)</b>	<b>162,089</b>
<b>Travel and Meetings</b>				
Travel - Mileage	5540	10,900	-	10,900
Travel - Out of Town	5541	37,750	-	37,750
Meetings/Conferences	5560	18,850	-	18,850
<b>Total Travel and Meetings</b>		<b>67,500</b>	<b>-</b>	<b>67,500</b>
<b>Licences, Dues and Other Fees</b>				
Staff Training/Education	5052	43,050	-	43,050
Other Employee expenses	5055	-	-	-
Recruitment	5095	4,800	-	4,800
Payroll Processing Fees	5103	6,500	-	6,500
License/Dues & Other Fees	5581	40,339	-	40,339
FSA Administrative Expenses	5582	1,080	-	1,080
401k Administrative Fees	5583	9,250	(9,250)	-
HRIS Administrative Fees	5584	7,800	-	7,800
<b>Total Licences, Dues and Other Fees</b>		<b>112,819</b>	<b>(9,250)</b>	<b>103,569</b>
<b>Amortizatoin and Depreciation</b>				
Depreciation Expense	5901	-	-	-
Amortization Expense	5902	-	-	-
<b>Total Amortizatoin and Depreciation</b>		<b>-</b>	<b>-</b>	<b>-</b>
<b>Miscellaneous</b>				
Bank Fees	5102	-	-	-
Other Expense	5700	-	-	-
Vehicle Expenses	5701	-	-	-
Penalties\Disallowed Expenses	5710	-	-	-
Interest Expense	5900	-	-	-
<b>Total Miscellaneous</b>		<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Expenditures</b>		<b>10,260,572</b>	<b>(834,367)</b>	<b>9,426,205</b>
<b>Net Revenue over (under) Expenditures</b>		<b>70,450</b>	<b>-</b>	<b>70,450</b>



## **ACTION ITEM 10**

### **Contract Renewal with Gray|Robinson Governmental Relations Services**

#### **BACKGROUND**

There has been a considerable amount of legislative activity regarding workforce-related programs and services over the past few years. Representation prior to and during the upcoming legislative sessions continues to be a priority; especially with the implementation of certain portions of the REACH Act and the impending consolidation of the CareerSource Pinellas and CareerSource Tampa Bay. There are three main focus areas of the REACH Act:

- The three-pillar Florida Workforce System Transformation Plan
  - Realignment and Consolidation
  - System-wide improvements
  - Regional Planning
- Credentials
- Letter Grades

#### **Realignment and Consolidation**

Relating to realignment and consolidation, the Governor approved CareerSource Florida's recommendation to consolidate CareerSource Pinellas with CareerSource Tampa Bay. CareerSource Florida contracted with Ernst & Young LLP to assist with the transition. Transition planning has begun and it is expected that operational transition completed by June 30, 2024, for all impacted boards, or mostly underway.

#### **System-wide improvements**

During stakeholder engagement, EY identified potential improvements through organizational and structural changes, streamlined user experiences and modernized processes and technologies. These system-wide improvements in areas of technology, administration, fiscal, procurement/contracts and programmatic policies reflect the second pillar for transformation.



## **ACTION ITEM 10 (cont.)**

### **Contract Renewal with Gray|Robinson Governmental Relations Services**

#### **Regional Planning**

The third and final pillar recommended for system transformation is the development of WIOA planning regions. WIOA strongly encourages states to create planning regions that combine two or more local workforce development boards and areas to “align workforce development activities and resources with larger regional economic development areas and available resources to provide coordinated and efficient services to both job seekers and employers.” A future structure for planning regions in Florida among a newly structured 21 local workforce development boards also allows the CareerSource Florida network to continue seeking system-wide access, alignment and accountability improvements expected by the REACH Act.

It is critical that CareerSource Pinellas continues to have a voice during the transition. Chris Carmody, Gray|Robinson, has substantial experience handling governmental relations matters. Mr. Carmody is the governmental relations partner that has 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. \$30,000 was approved for Government Relations (Lobbying) in the 2023-2024 planning budget.

#### **RECOMMENDATION**

Approval to renew the existing contract with Gray|Robinson Government Relations Services for an amount not to exceed \$30,000 plus incidental expenses through June 30, 2024.



## ACTION ITEM 11

### WIOA Dislocated Worker Fund Transfer Approval

#### **Background**

The Workforce Innovation and Opportunity Act (WIOA) provides the authority for Local Workforce Development Boards (LWDB), with the approval of the Governor, to transfer 100% of the funds allocated to the LWDB for adult activities for expenditure on dislocated worker activities, and dislocated worker funds for expenditure on adult activities. Funds may not be transferred to or from the WIOA Youth program.

Prior approval from Florida Department of Commerce is required for each transfer. In addition, when the request exceeds 25% of the annual allocation, the full board must vote to approve the request.

The majority of participants that are requesting training services under Occupational Skills Training or On-the-Job Training are eligible under the Adult Program rather than the Dislocated Worker program or funding. It is anticipated that our Adult funds would be exhausted if the request is not granted and we would be required to close Adult enrollment.

With approval of this transfer, CareerSource Pinellas still has sufficient funds to serve dislocated workers for the remainder of the program year. As a reference, we were approved to reallocate \$700,000 of Dislocated Funds for Adult for July 1, 2022 – June 30, 2023. For the fiscal year ended June 30, 2023, we spent \$660,421.82 of the approved funds.

Grant Program Year	Total Award Amount	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult	Status
2022-2024	\$1,452,166	\$1,000,000	69%	To be Requested

#### **RECOMMENDATION**

Staff recommends approval to transfer up to \$1,000,000 from Dislocated Worker to Adult for July 1, 2023 – June 30, 2024, as shown above and more fully described in the attached DEO Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs.

**Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs**  
**From 7/1/2023 through 6/30/2024**

**LWDB Number and Name (Requestor):** CareerSource Pinellas - LWDB 14

**Name / Title of Requestor Representative:** Steven Meier, CEO

**Adult and Dislocated Worker Transfer Request**

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
2022	Dislocated Worker Program	1,452,166.00	0.00	0	1,000,000.00	69%

**COMPLETE THE BELOW SECTIONS FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION**

**Reason for requesting the use of one program's funding for the other (e.g. anticipated depletion of current funds, changes in labor market conditions, etc.):**

The majority of participants that are requesting training services under Occupational Skills Training or On-the-Job Training are eligible under the Adult Program rather than the Dislocated Worker program or funding. It is anticipated that our Adult funds would be exhausted if the request is not granted and we would be required to close Adult enrollment. There is a high incidence of adults given priority under Priority of Service.

**A description of outreach/marketing activities conducted to ensure underserved populations were aware of available services:**

We have robust outreach and marketing activities through our CareerSource Pinellas marketing department. This includes press releases to the community, ongoing social media engagement, outreach through email media via constant contact, our large and growing One Stop partners, community partners and our American job centers, especially our CareerSource Pinellas satellite centers serving underserved populations in the Pinellas community. Added linkage is in place with our CareerSource Pinellas programs such as RESEA, SNAP E&T, and WP programs. Use of the call center to support CareerSource Pinellas outreach efforts.

**Labor market conditions contributing to the need for the transfer:**

Our local unemployment rate (2.5% in May 2023) is lower than the state average (2.6% in May 2023) and there is a low level of Dislocated Workers presently inquiring about training or work-based training services.

**The number of participants originally planned to be served by the base allocation compared to the estimated number of participants expected to be served after funds are transferred.**

Initial training goals were to enroll new or continue training services for approximately **100** adults under Adult Funding. With the transferred funds, we would anticipate enrolling an additional **100 - 125** adults under Adult funding.

**COMPLETE THE BELOW CERTIFICATION FOR REQUESTS THAT EXCEED 25% OF THE PROGRAM'S ANNUAL ALLOCATION**

I certify the following:

1. When transferring from Adult to Dislocated Worker - The LWDB has sufficient funds to serve the WIOA Adult priority populations.
2. When transferring from Dislocated Worker to Adult - The LWDB has sufficient Dislocated Worker funds to serve dislocated workers in the local area; there are no pending layoffs that may impact the need for dislocated workers in the local area.
3. The full board voted to approve this request to transfer funds and a copy of the LWDB's meeting minutes are included with this request.

I certify the above information is true and correct.

\_\_\_\_\_  
Signature of Board Chair

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date



## **INFORMATION ITEM 1**

### **Consolidation Update**

Pinellas County and Hillsborough County representatives, along with each workforce board CEO, have met to begin discussing framework for Consortium Agreement and entity by-laws. Nothing has been agreed to as of today. In addition, Ernst & Young (EY) has begun in-person interviews with all impacted workforce boards. Their conversations were instrumental in developing a deeper understanding of alignment and consolidation efforts across the CareerSource Florida network. Meetings are set up for Thursday, September 14 to introduce the Alignment and Consolidation Checklist which will serve as a guide for key discussions and decision points. In addition, EY and CareerSource Florida personnel will be scheduling bi-weekly check-ins to discuss progress towards alignment and consolidation.

See attached for Florida Workforce System Transformation Plan Overview.



# FLORIDA WORKFORCE SYSTEM TRANSFORMATION PLAN OVERVIEW

The Florida Workforce System Transformation Plan streamlines and modernizes the state's workforce system, enhancing alignment and accountability, serving job seekers and businesses more effectively, and improving outcomes for Floridians.

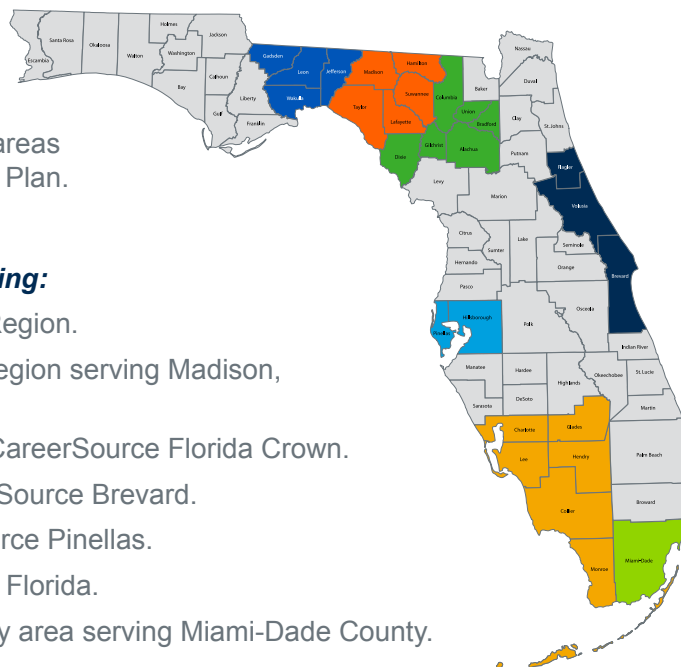
Empowered by the state's landmark Reimagining Education and Career Help (REACH) Act, the plan is focused around three pillars: Alignment and Consolidation, System-wide Improvements and Regional Planning. Implementation currently underway will increase collaboration among economic, educational, and governmental agencies; enhance services to customers to be consistent across the state; use resources more effectively and strengthen the state's economy by supporting regional economies.

## BACKGROUND

A reduction in the number of local workforce development boards was required by the REACH Act to minimize duplication, improve consistency and maximize resources to enhance outcomes for businesses and individuals, emphasizing a customer-focused approach. Extensive feedback and research during an Alignment Evaluation phase in 2022 - 2023 resulted in the CareerSource Florida Board of Directors' approval of two additional transformation strategies – System-wide Improvements and Regional Planning.

## PILLAR I – ALIGNMENT AND CONSOLIDATION

In May 2023, the Governor affirmed the recommendation provided by the CareerSource Florida Board of Directors to realign and consolidate 10 local workforce development areas as outlined in the Florida Workforce System Transformation Plan. These changes will affect 27 counties.



***Alignment and consolidation actions include the following:***

- ▶ Realign Jefferson County with CareerSource Capital Region.
- ▶ Realign CareerSource North Florida as a five-county region serving Madison, Taylor, Lafayette, Hamilton and Suwannee counties.
- ▶ Consolidate CareerSource North Central Florida and CareerSource Florida Crown.
- ▶ Consolidate CareerSource Flagler Volusia and CareerSource Brevard.
- ▶ Consolidate CareerSource Tampa Bay and CareerSource Pinellas.
- ▶ Realign Monroe County with CareerSource Southwest Florida.
- ▶ Realign CareerSource South Florida as a single-county area serving Miami-Dade County.

By June 30, 2024, significant local actions will have been taken to ensure Florida has transitioned to 21 local workforce development areas and boards. This will include:

- New local governance determined and in place across impacted boards.
- Interlocal agreements, consortiums, and new organizational structures that may reflect 501(c)(3) filings to establish nonprofits or other administrative structures such as governmental entities.
- Operational transitions underway for all impacted boards.

## **PILLAR II – SYSTEM-WIDE IMPROVEMENTS**

The Florida Workforce System Transformation Plan provides an unprecedented opportunity to combine strategic local workforce development board alignment changes with statewide and state-level improvements in policy and operations.

These system-wide improvements will enhance consistency and coordination between local workforce development boards and state workforce partners, including CareerSource Florida, the Florida Department of Commerce and the Florida Department of Education. Consistency system-wide will help streamline experiences for job seekers, workers, and businesses, allowing a more agile workforce system to better adapt to changing marketplace and consumer expectations.

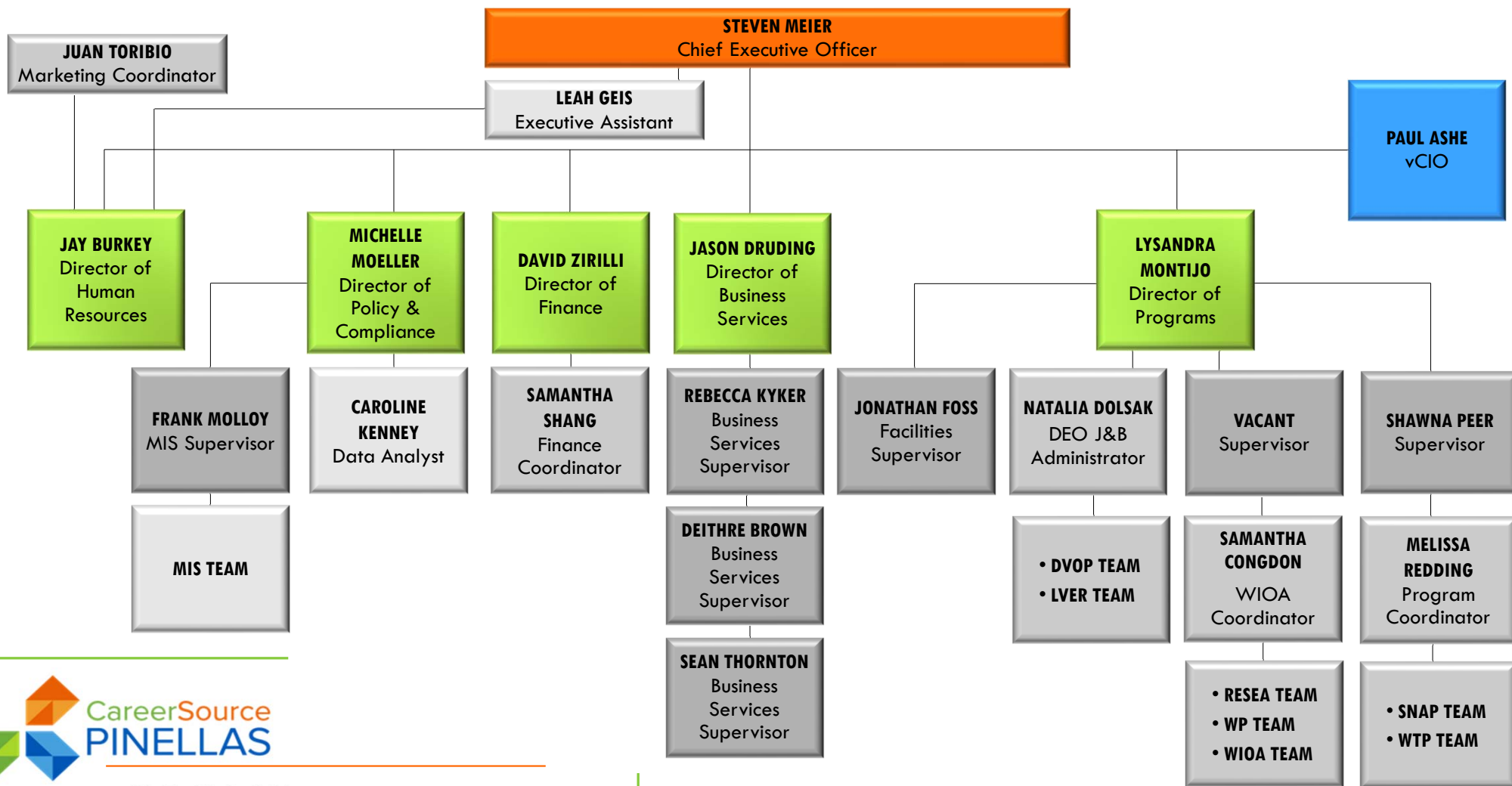
By June 30, 2024, significant improvements in policies, processes, technology and tools will have been made and will be ongoing in alignment with the workforce system's commitment to continuous improvement. These enhancements, applied operationally across Florida's workforce development system, include, but are not limited to, standardized contracts and processes as well as cost savings achieved through leveraging state buying power.

## **PILLAR III – REGIONAL PLANNING**

The Workforce Innovation and Opportunity Act encourages the development of regional plans to align workforce development activities and resources with larger regional economic development areas and available resources to provide coordinated and efficient services to both job seekers and employers. The goal of regional planning is to develop, align and integrate strategies and resources to support regional economic growth.

As part of Florida Workforce System Transformation Plan implementation, regional planning areas will be developed to include a minimum of two contiguous local workforce development areas, ensuring increased collaboration and productivity.

The Regional Planning Area Policy will be presented to the state workforce development board for approval in September 2023, with the request for initial regional planning area designation submitted to the state workforce development board for approval and recommendation to the Governor in December 2023. By June 30, 2024, at least two regional planning areas will be identified, structured, and compliant with regional planning requirements.

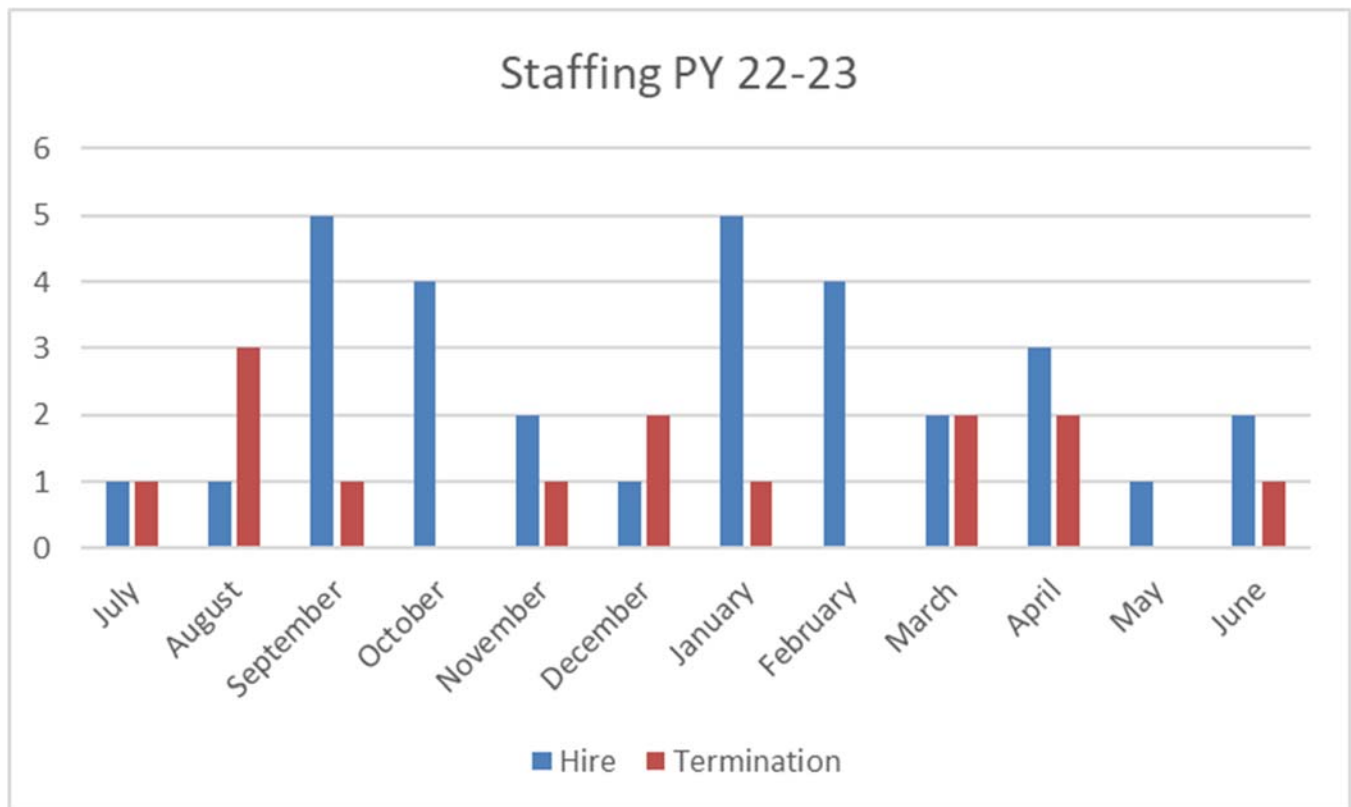


# ORGANIZATION CHART



### INFORMATION ITEM 3 STAFFING REPORT

For program year 2022-2023, there were 31 employees hired and the organization had 14 terminations. At June 30 2023, the organization had 64 FTEs, 1 part-time employee and 1 marketing intern for the summer. At June 30, 2022, the organization had 48 FTEs. With increased staffing, the organization was able to provide better services to job seekers and employers.





## **INFORMATION ITEM 3 (cont.) STAFFING REPORT**

### **Terminations**

- 1 COO
- 1 Apprentice Navigator
- 2 Director
- 5 Career Counselor
- 1 Business Services Rep
- 2 Coordinator
- 1 Specialist
- 2 Supervisor

### **New Hires**

- 1 Admin Assistant
- 2 Business Service Rep
- 9 Career Counselor
- 2 Coordinator
- 3 Director
- 3 Placement Specialist
- 6 Specialist
- 2 Supervisor
- 2 Technician

We continue to evaluate the needs of the organization and will hire based upon servicing the needs of the job seekers and employers of Pinellas County taking into account budgetary considerations.

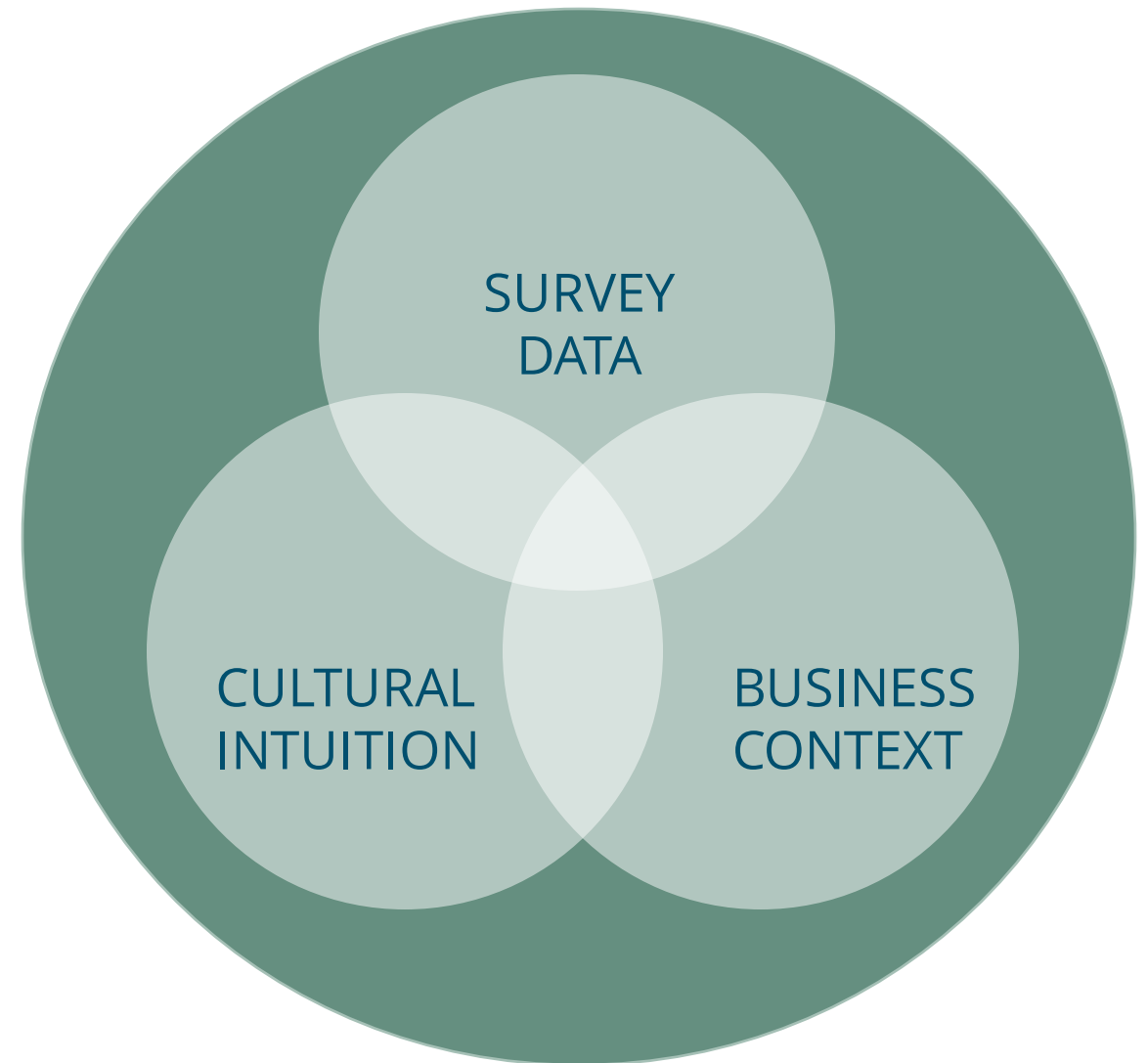
CareerSource Pinellas: Meier, Steven

# Engagement Results

8/14/2023

# Agenda

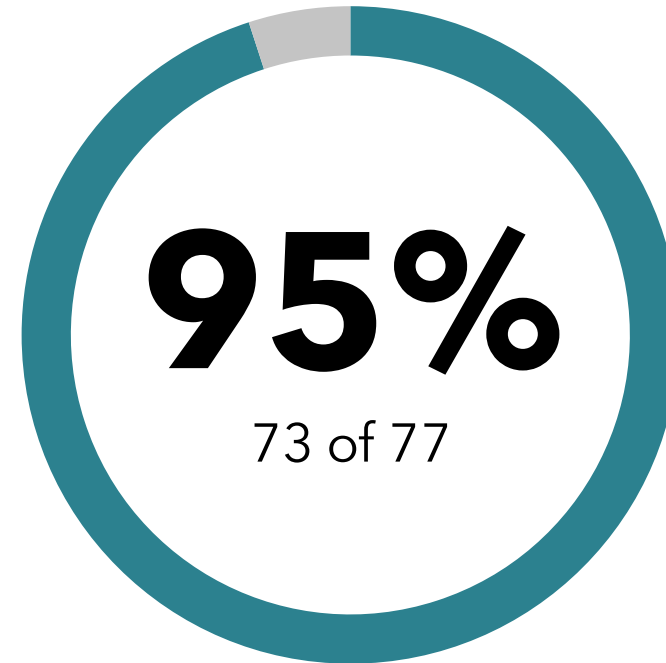
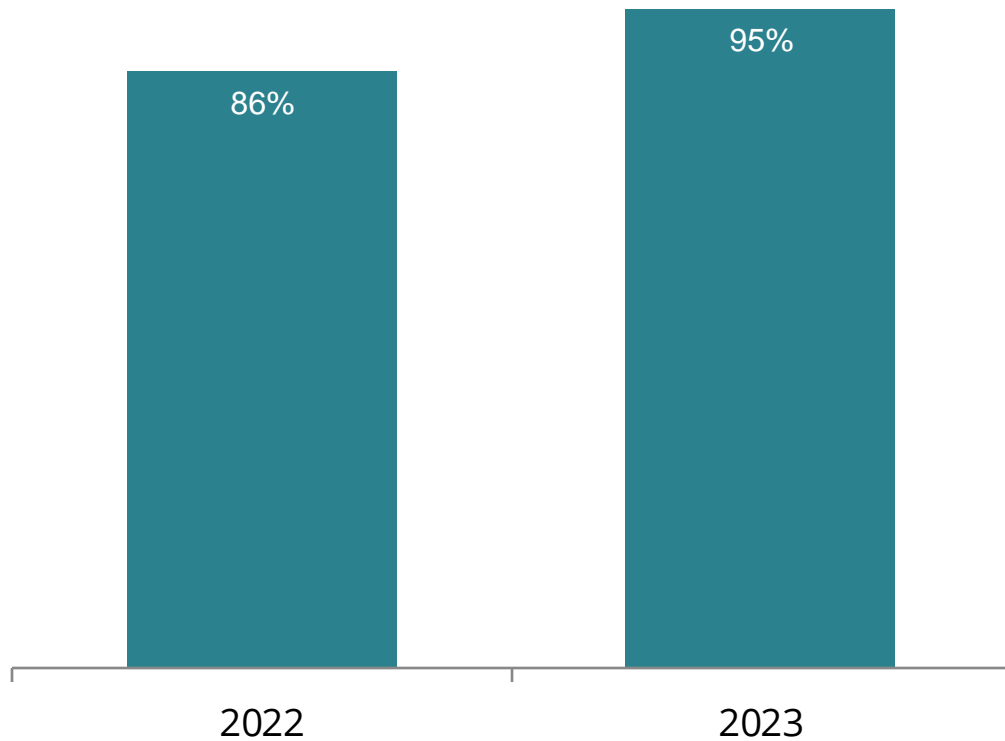
1. Overall Results
2. Demographic Comparisons
3. Highs/Lows & Comments
4. Engagement Analysis
5. Intent to Stay Analysis
6. Key Themes
7. Summary & Next Steps



# Overall Results

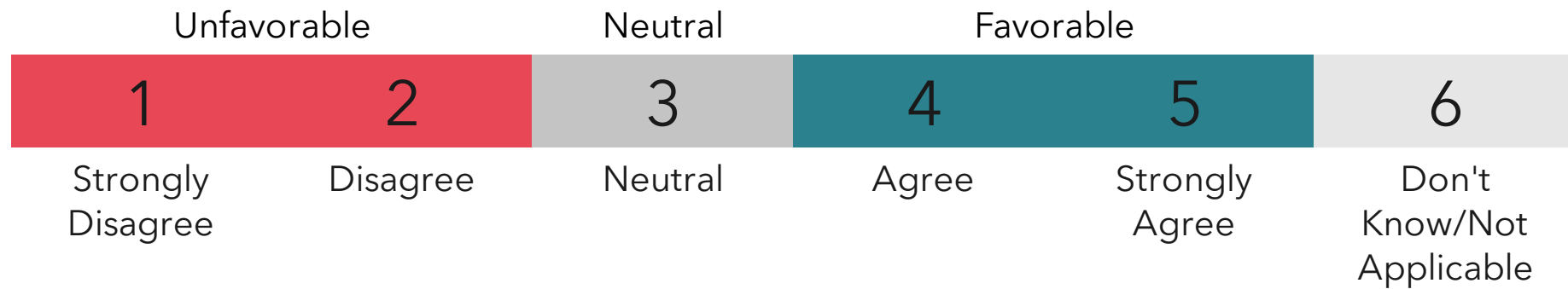


# Participation



Survey Administered Jul 10 - Jul 21, 2023

# Score Calculation Format



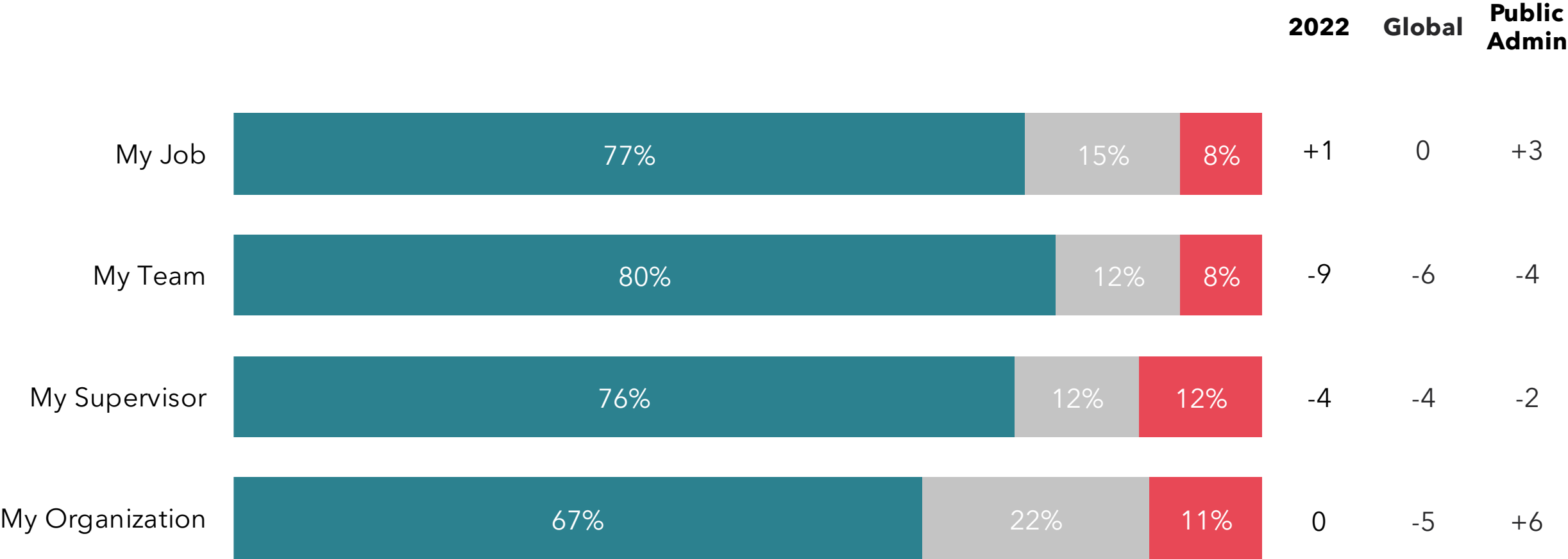
# Overall Score



- 51 items total
- 50 items comparable to the Global benchmark that includes 398 organizations and 716 survey administrations from all industries from 2019-2023. (76% favorable)
- 48 items comparable to the Public Administration Industry benchmark that includes 16 organizations, 23 survey administrations and 790,036 survey responses from 2019-2023. (69% favorable)

■ Favorable ■ Neutral ■ Unfavorable

# Dimension Overview

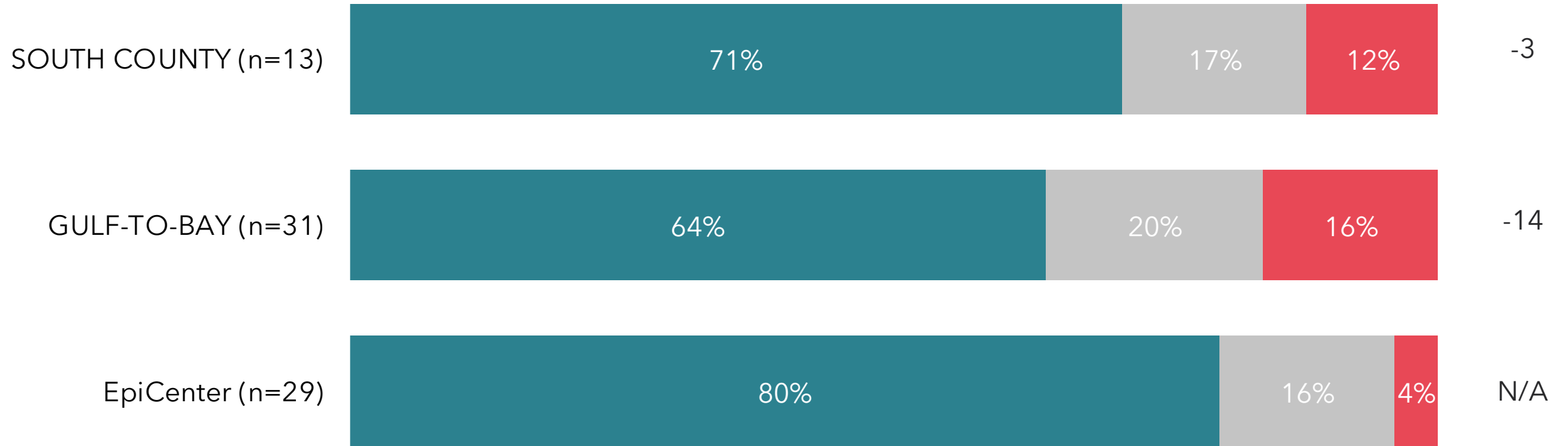


Favorable Neutral Unfavorable

# Demographic Comparisons

# Overall Score By Location

2022



Favorable Neutral Unfavorable

# Overall Score By State/Board

2022

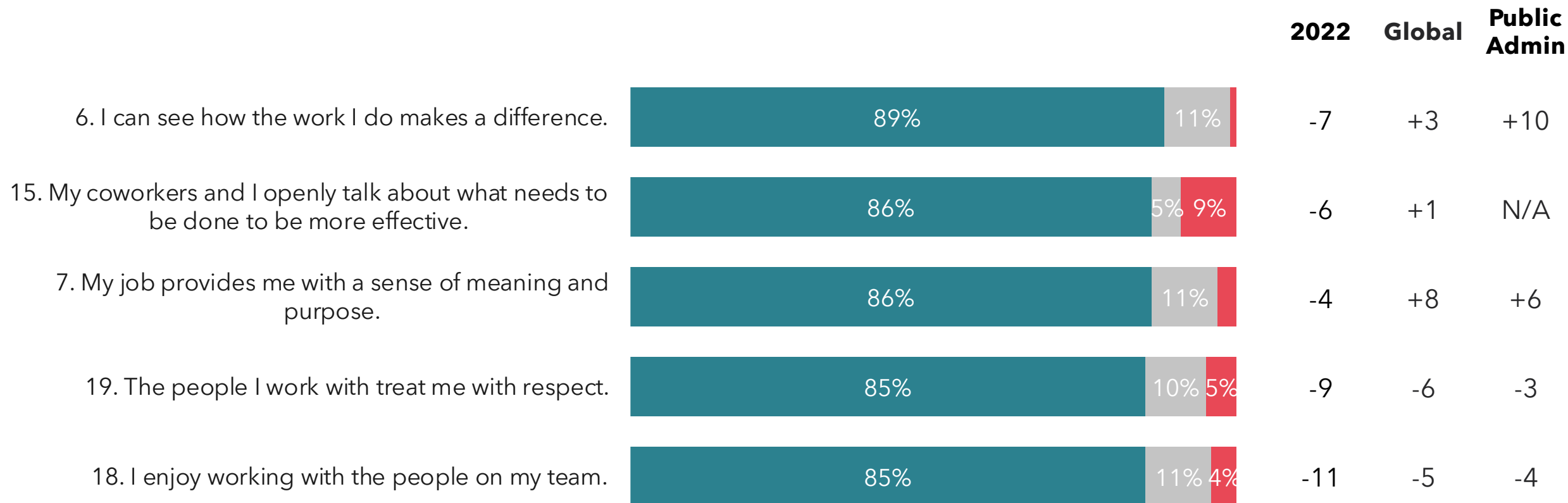


Favorable Neutral Unfavorable

# Highs, Lows & Comments



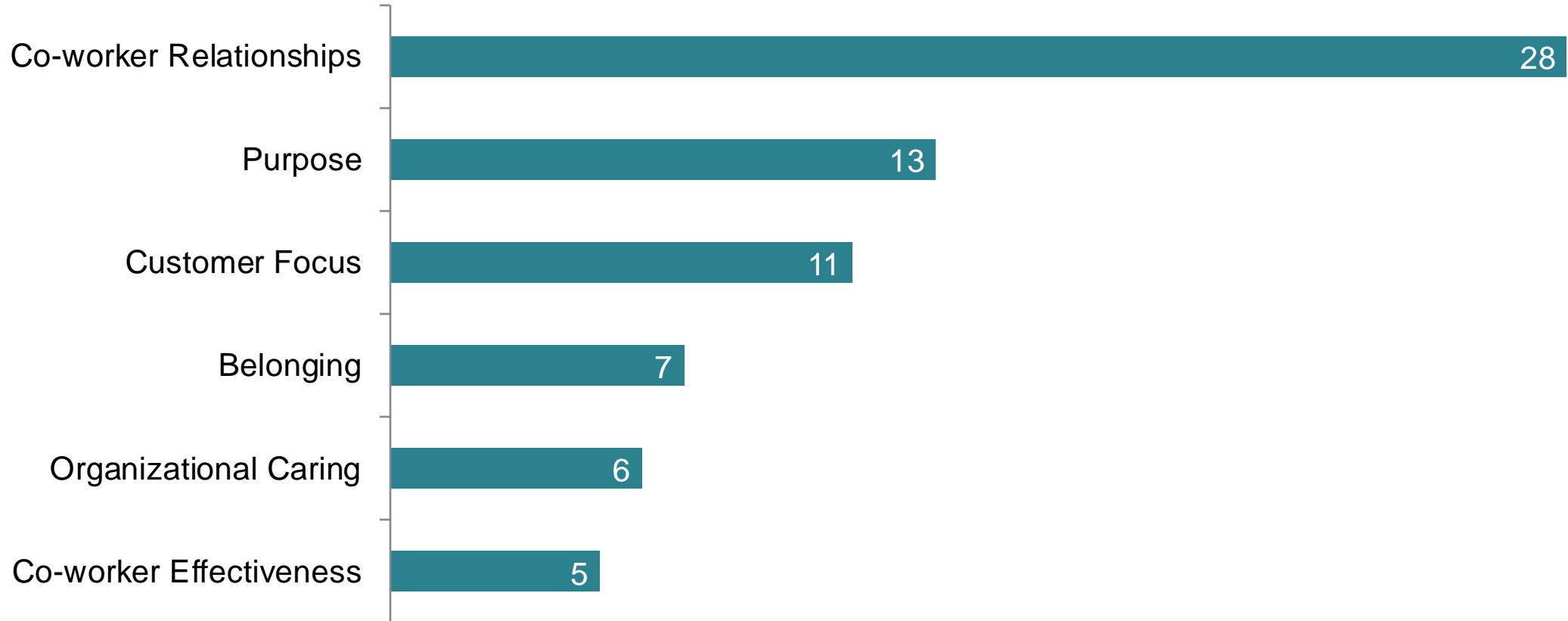
# Highest Scores



■ Favorable
 ■ Neutral
 ■ Unfavorable

# Comment Themes

What do you like about working here?



Total Comments: 96

# Lowest Scores

		2022	Global	Public Admin
29. I feel my compensation is competitive compared to the industry.	<div> <div>43%</div> <div>19%</div> <div>38%</div> </div>	+10	-7	N/A
39. We work effectively across departments and functions.	<div> <div>47%</div> <div>27%</div> <div>26%</div> </div>	-2	-12	-10
27. There are opportunities for my own advancement at CareerSource Pinellas.	<div> <div>54%</div> <div>31%</div> <div>15%</div> </div>	+2	-8	+3
34. I feel that the culture at CareerSource Pinellas has improved in the last six months.	<div> <div>56%</div> <div>29%</div> <div>15%</div> </div>	-15	N/A	N/A
30. I am satisfied with the benefits I receive.	<div> <div>58%</div> <div>22%</div> <div>20%</div> </div>	+10	-9	+9

■ Favorable
 ■ Neutral
 ■ Unfavorable

# Comment Themes

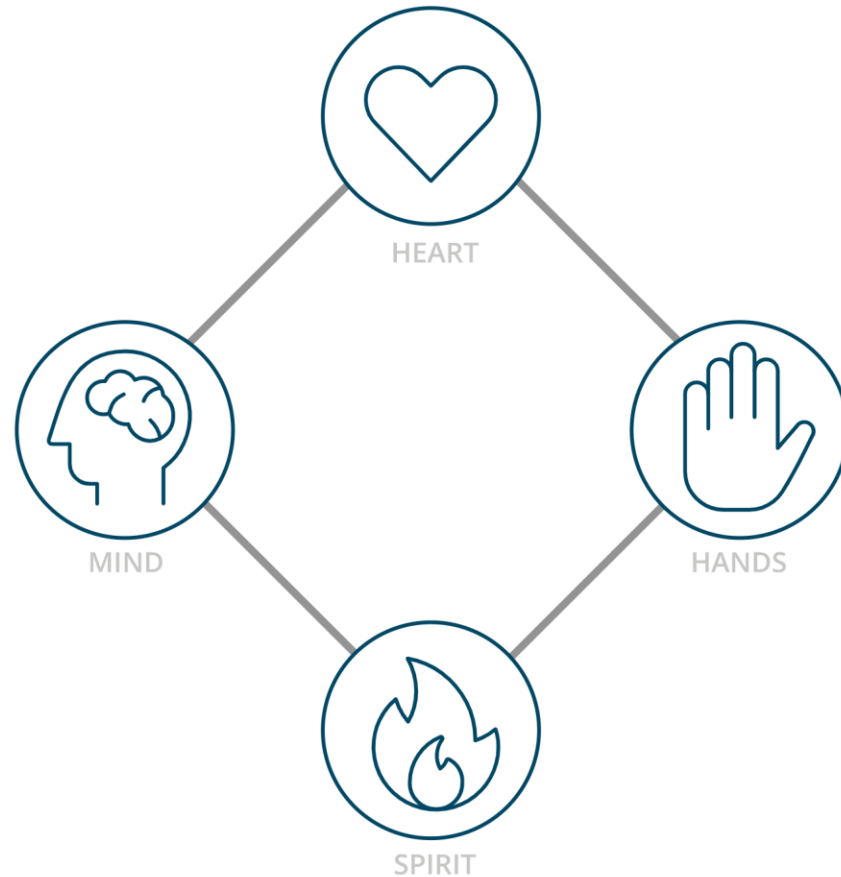
What can this organization do to make this a better place to work?



Total Comments: 145

# Engagement Index Analysis

# Engagement Anchor Questions



9. Most days, I look forward to my work.

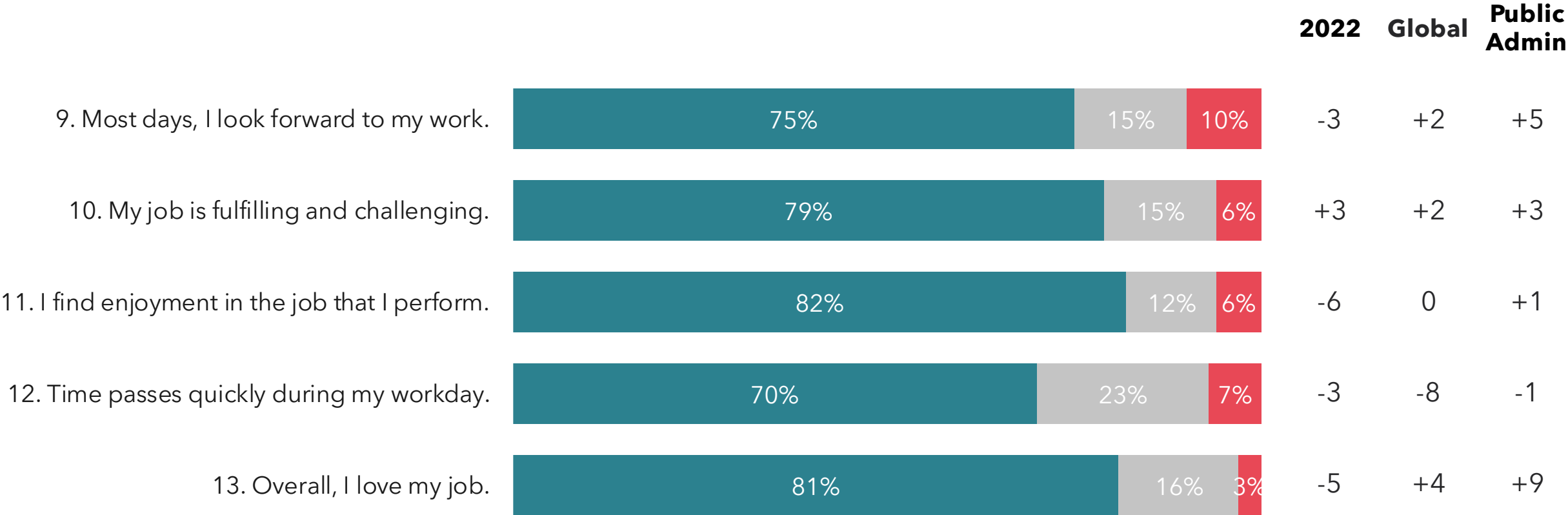
10. My job is fulfilling and challenging.

11. I find enjoyment in the job that I perform.

12. Time passes quickly during my workday.

13. Overall, I love my job.

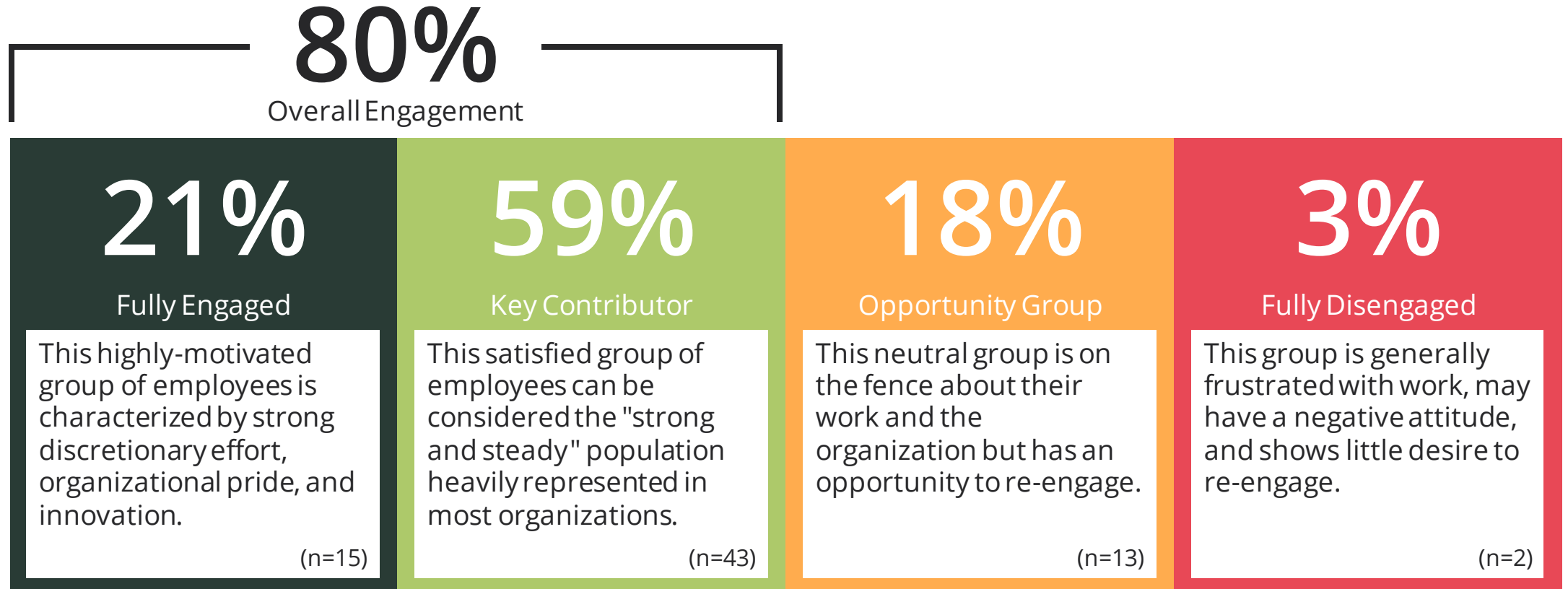
# Engagement Anchor Questions Scores



\*The CareerSource Pinellas 2023 Engagement Index Index is calculated based on an individual's average score to these questions.

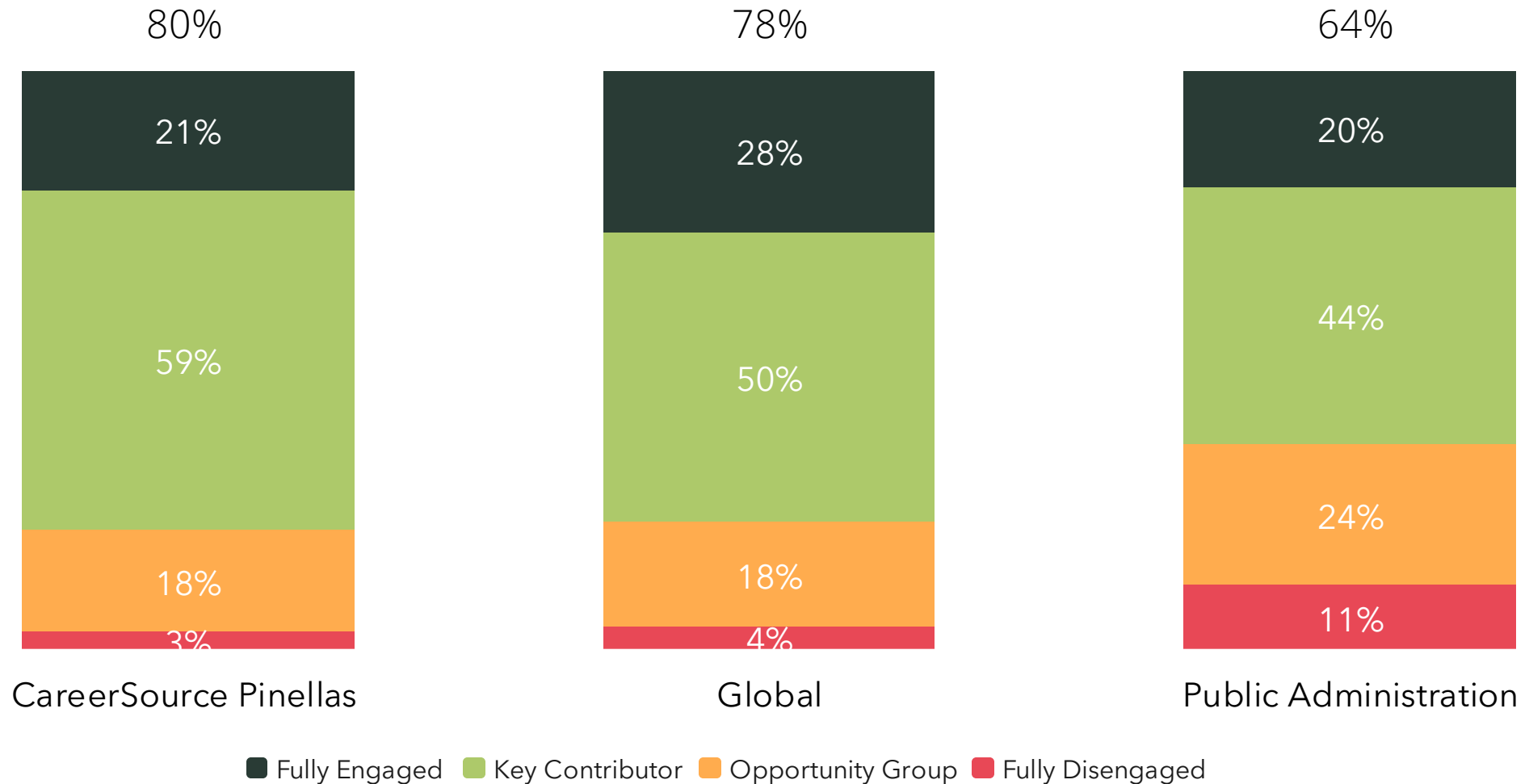
Favorable
Neutral
Unfavorable

# Engagement Index





# Engagement Index Comparisons



# Opportunity Group Perceptions

18%

Opportunity Group

(n=13)

## Positive Perceptions

15. My coworkers and I openly talk about what needs to be done to be more effective.	31%
--	-----

20. My supervisor communicates important information to the team.	31%
---	-----

19. The people I work with treat me with respect.	23%
---	-----

14. The people on my team collaborate and help each other.	23%
--	-----

18. I enjoy working with the people on my team.	15%
---	-----

\*This is the percentage of people in the Opportunity Group who answered Strongly Agree

## Negative Perceptions

29. I feel my compensation is competitive compared to the industry.	46%
---	-----

8. My work gives me opportunities to learn and grow.	46%
--	-----

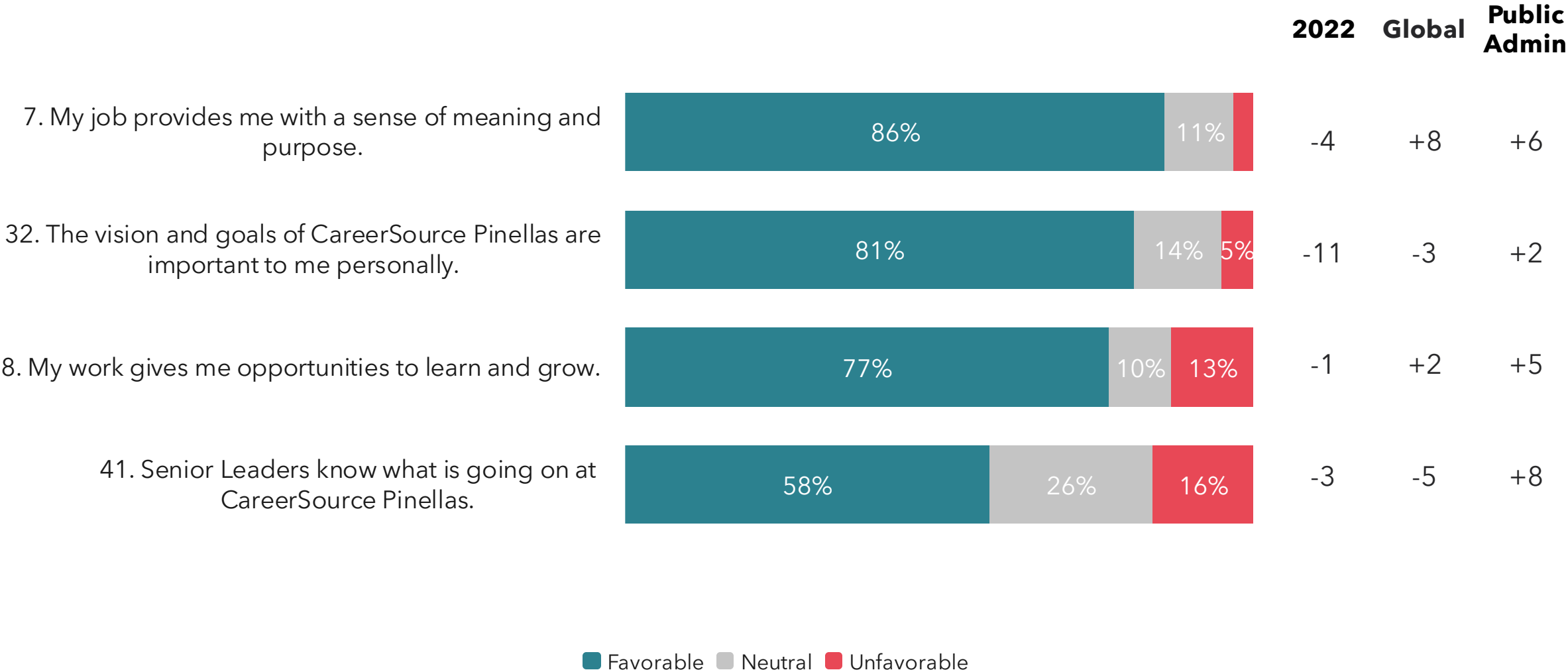
39. We work effectively across departments and functions.	46%
---	-----

5. The level of stress in my job is manageable.	38%
---	-----

1. I have the tools and resources I need to do my job well.	31%
---	-----

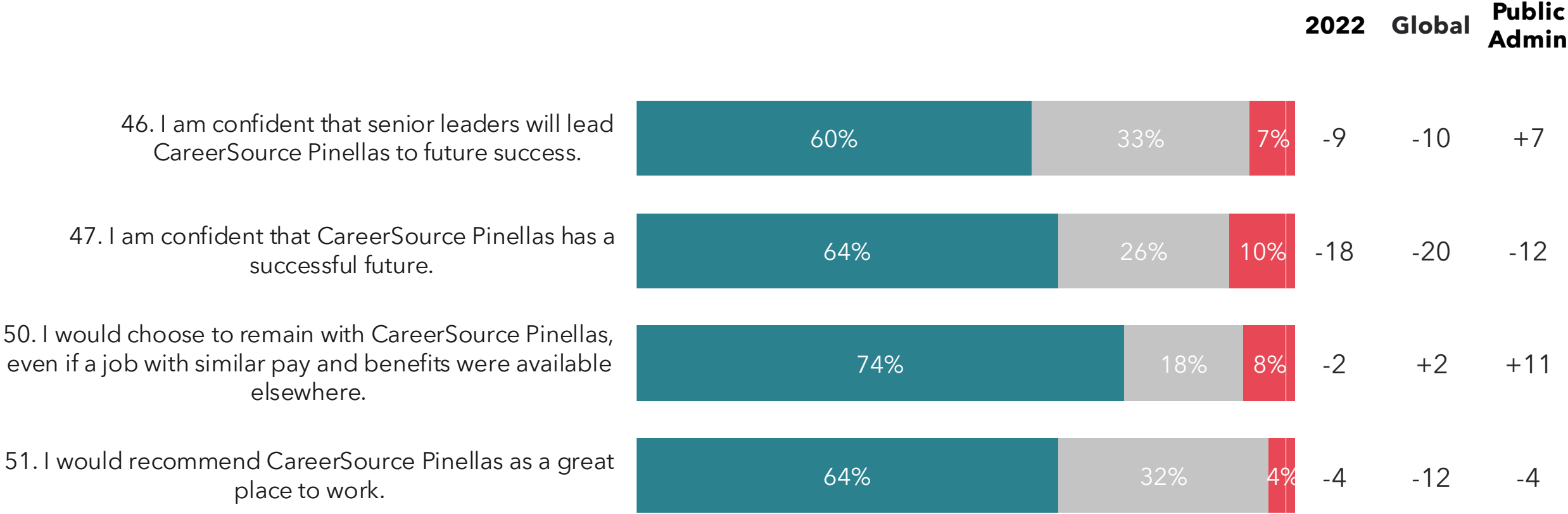
\*This is the percentage of people in the Opportunity Group who answered Disagree or Strongly Disagree

# Drivers of Engagement



# Intent to Stay Analysis

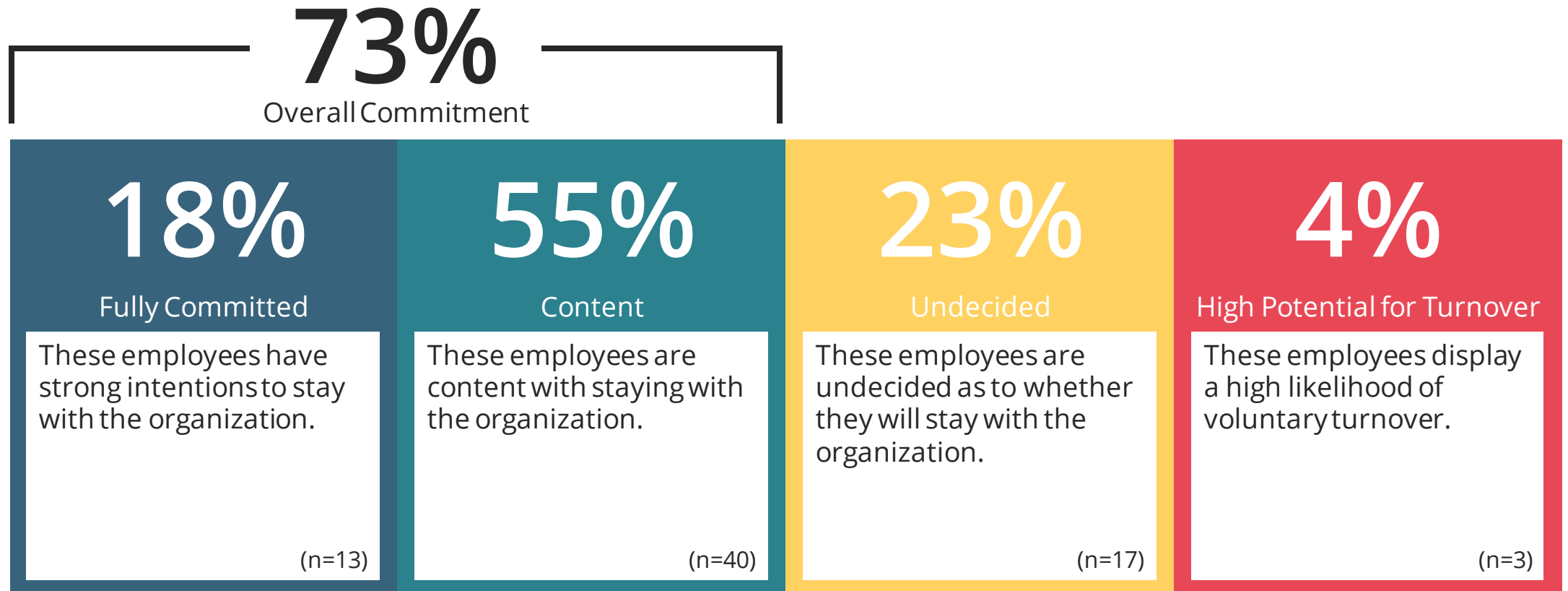
# Intent to Stay Anchor Questions



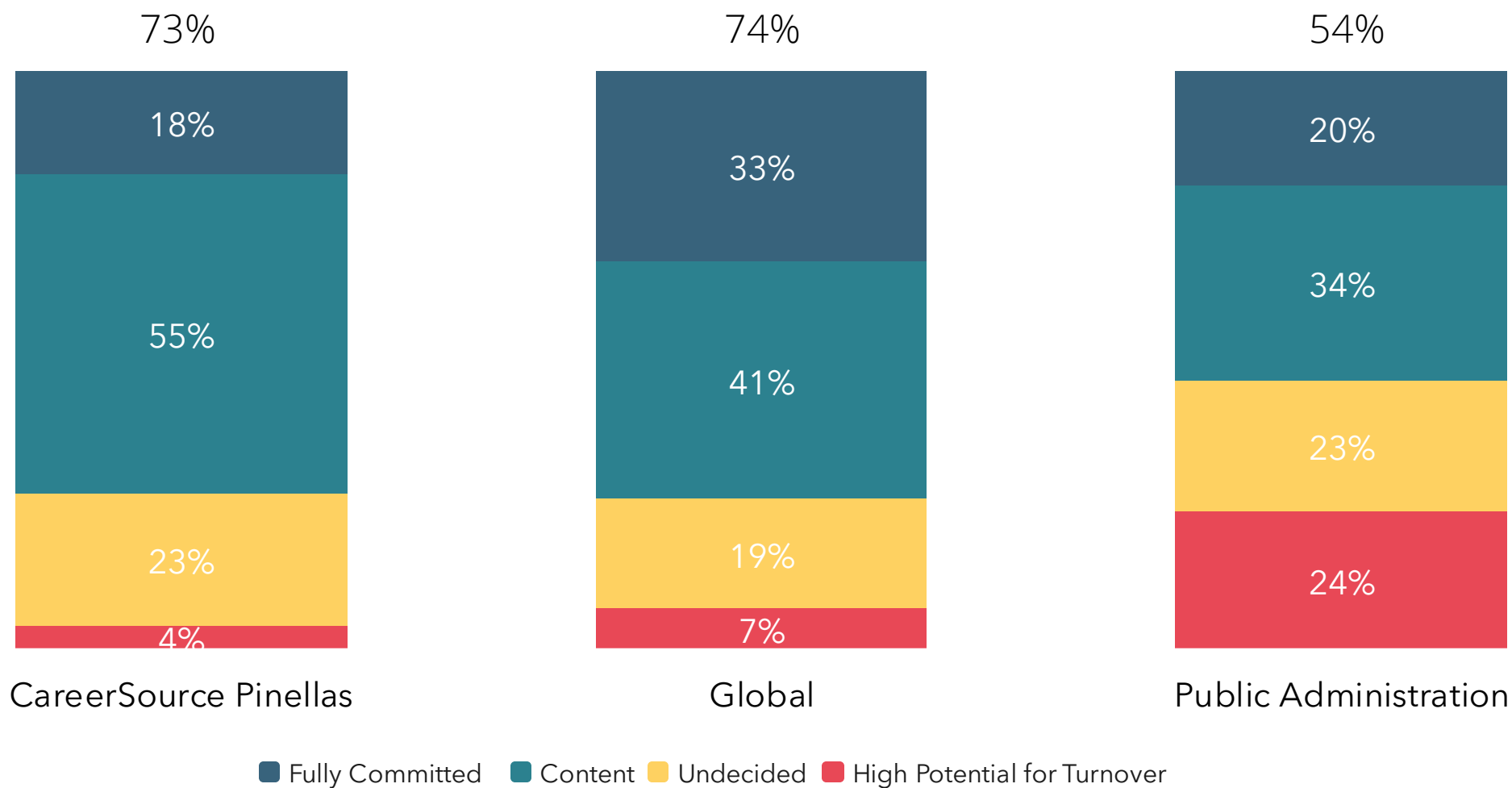
\*The Intent to Stay Index is calculated based on an individual's average score to these questions.

Favorable Neutral Unfavorable

# Intent to Stay Index



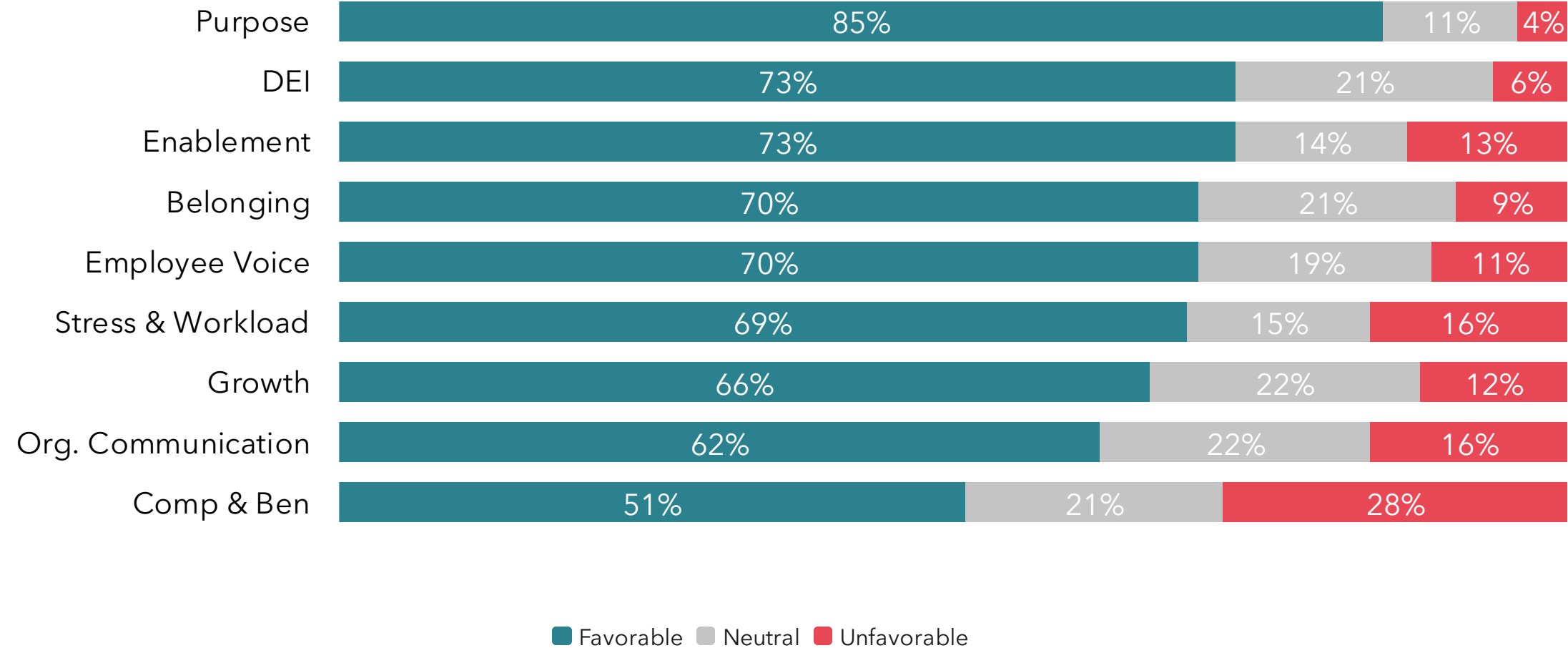
# Intent to Stay Index Comparisons



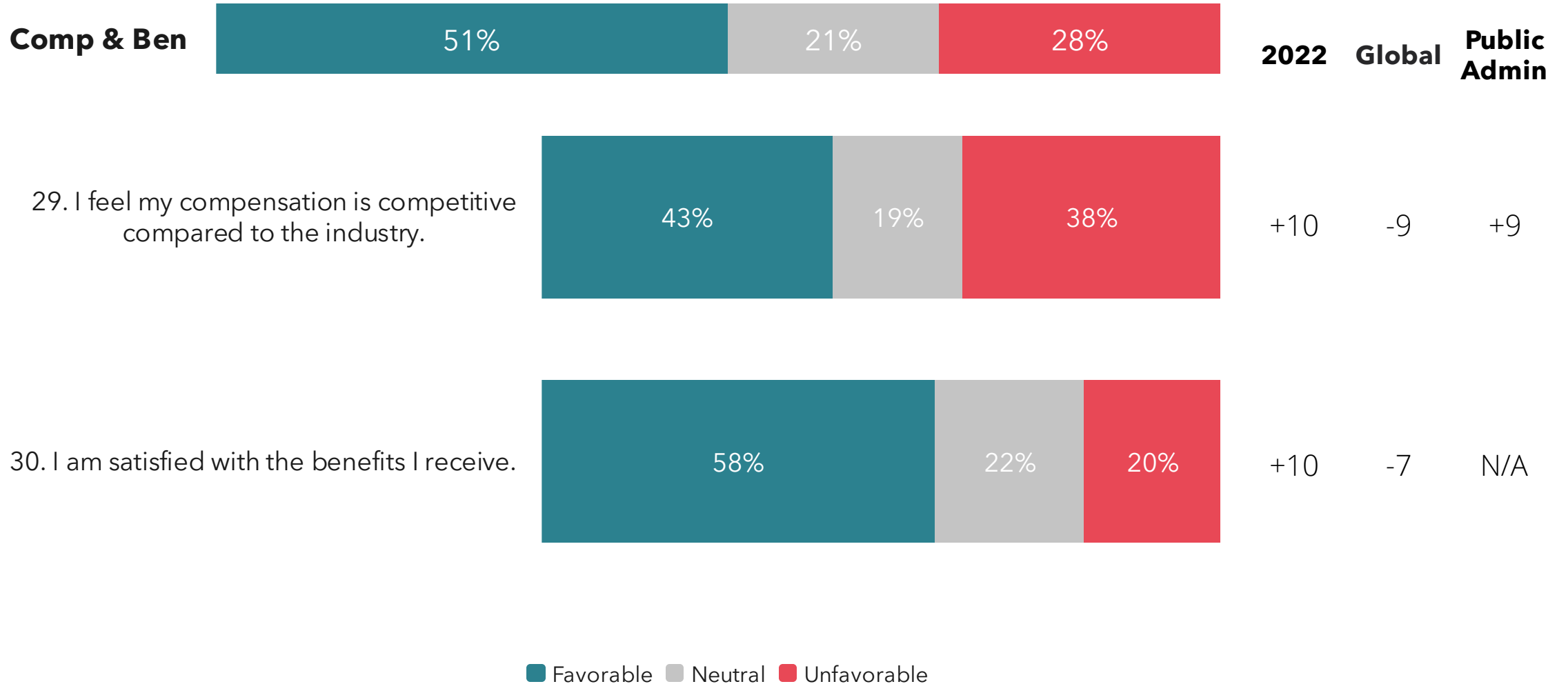
# Theme Analysis



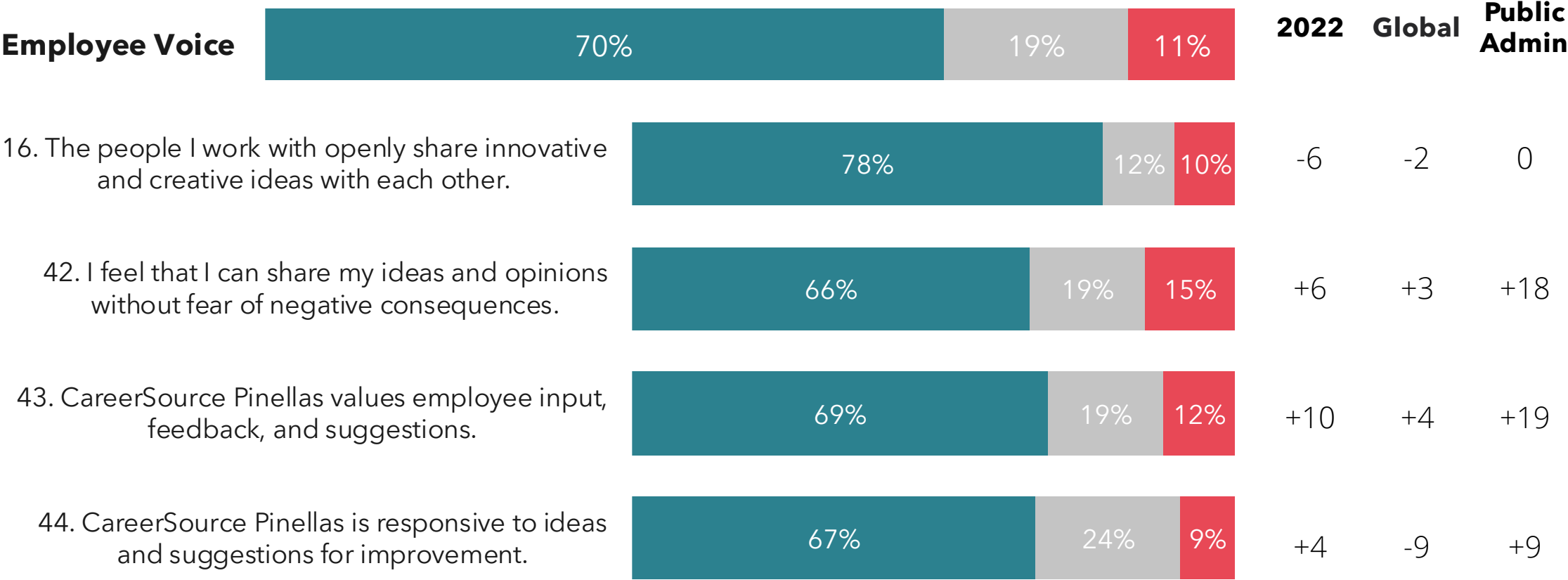
# Theme Analysis



# Comp & Ben Results

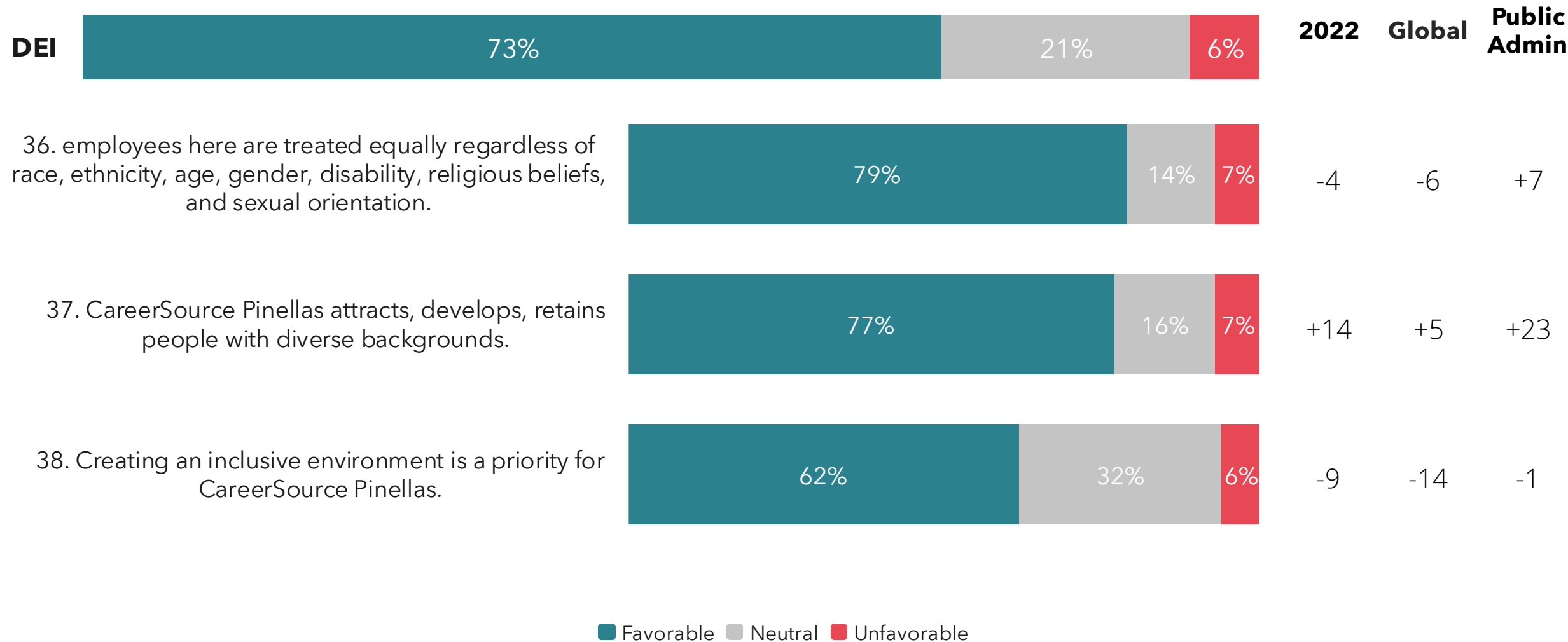


# Employee Voice Results

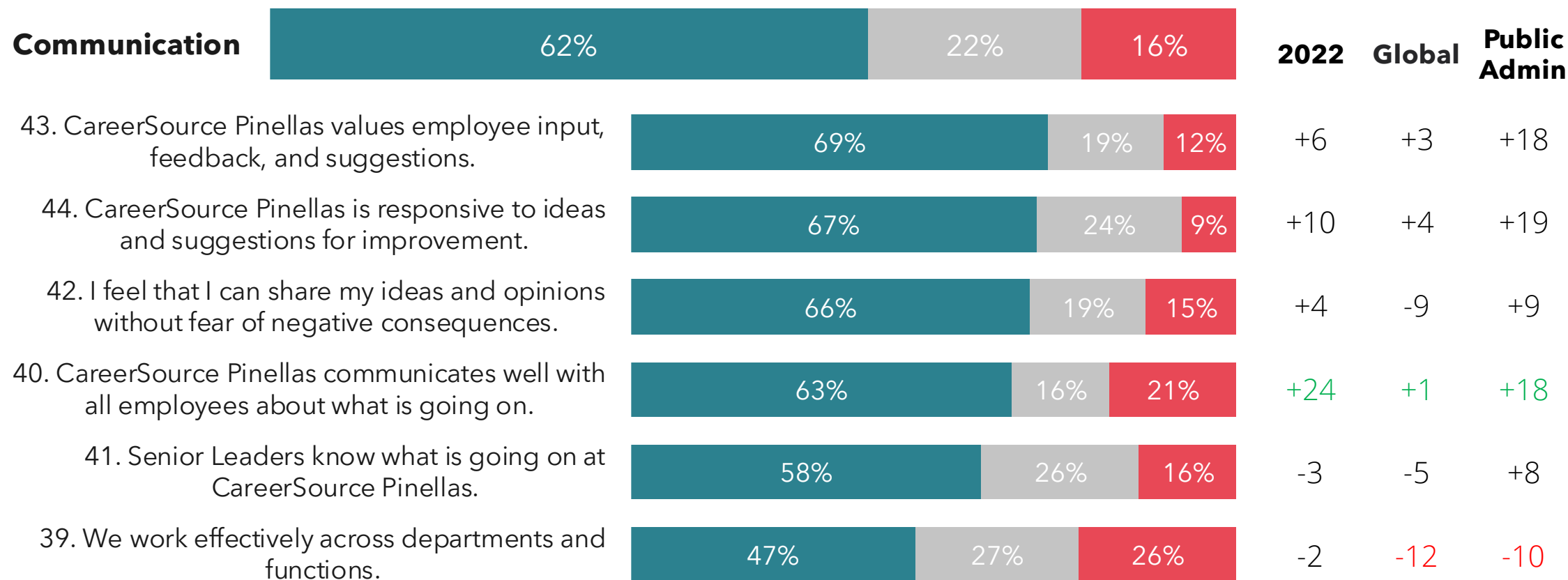


■ Favorable
 ■ Neutral
 ■ Unfavorable

# DEI Results



# Organizational Communication Results



■ Favorable
 ■ Neutral
 ■ Unfavorable

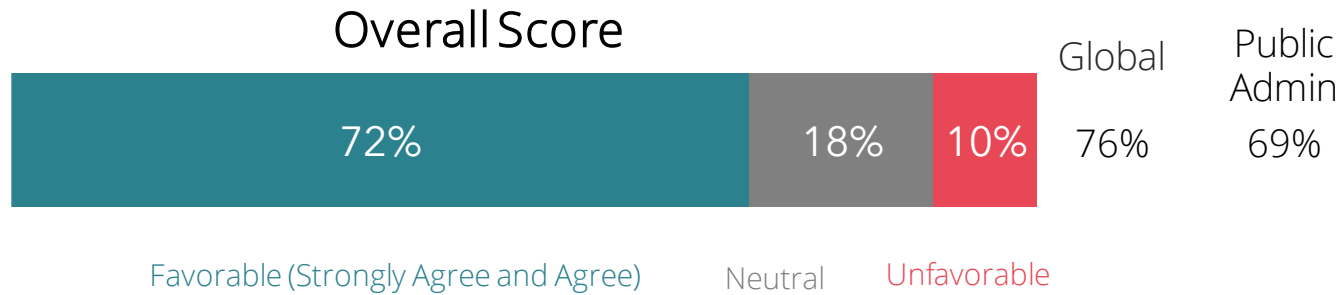
# My Team Results



■ Favorable
 ■ Neutral
 ■ Unfavorable

# Summary & Next Steps

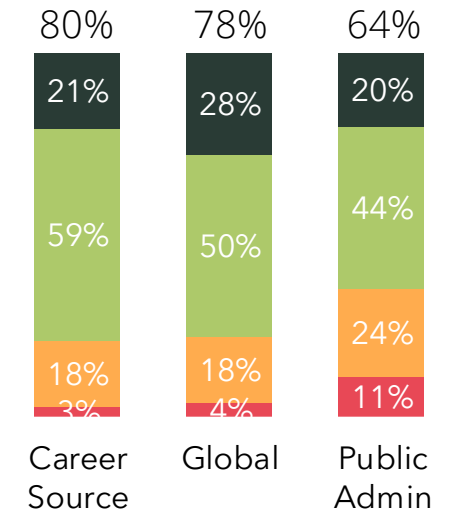
# Summary



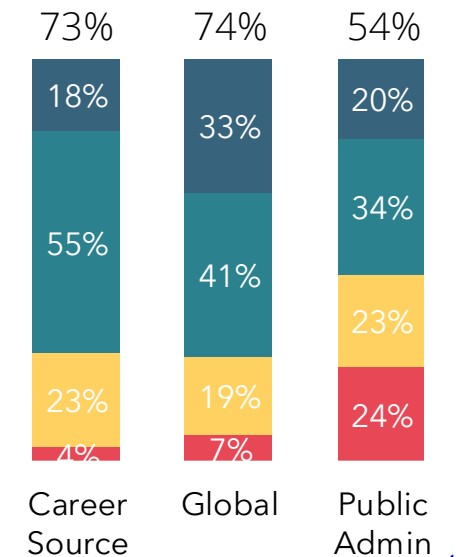
## Insights

- Engagement & Intent to Stay Index Scores are good compared to the benchmarks
- Compensation and Benefits favorability increased by 10% each
- Employee Voice related items scored significantly higher compared to the Public Administration industry benchmark
- Cross functional collaboration scores were significantly lower than expected
- All Team related survey items decreased since last time

## Engagement

















## Intent to Stay





# Next Steps

		Audience	Aug	Sept	Oct
Executive Debrief		Executives			
Distribute Manager Reports		All Managers			
All Employee Debrief/Email		All employees			
Leader 1:1s with HRBPs		Any leaders receiving reports (optional)			
Manager-led Team Debriefs		All leaders			
Team Action Planning Meetings		All leaders			
Action Plans Due		All leaders			

# Share The Results: Employee Email Template

Thank you for your participation in 2023 Employee Engagement Survey! We had 95% participation rate, 73 out of 77 employees. Thank you to those who participated.

To maintain confidentiality, results will be provided for each department if there are five or more responses in a group.

**Attached is an overall report in PDF format.** We identified the following strengths and opportunities from the results:

**Strengths:**

- Employee Voice
- Purpose

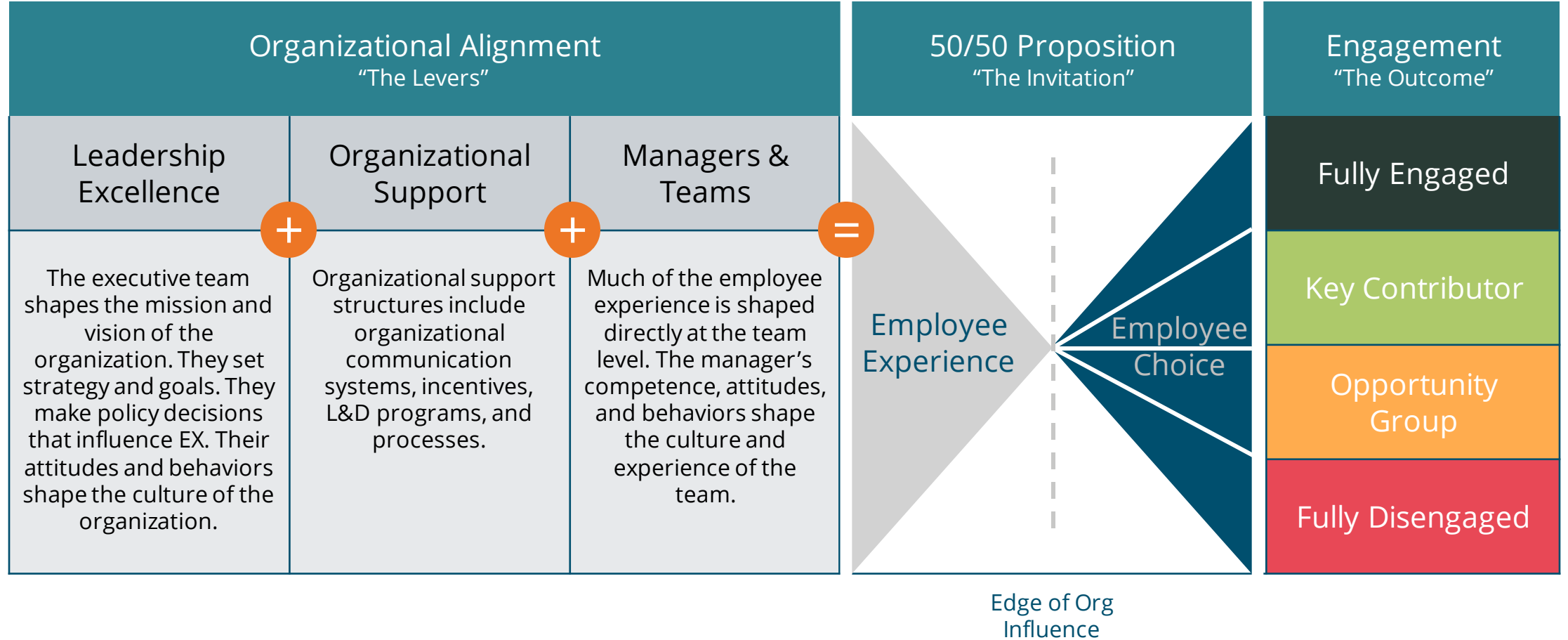
**Opportunities:**

- Diversity, Equity & Inclusion
- Collaborations

In September/October, departments will schedule a time with employees to share team survey results, ask for input from employees, and develop an action plan to increase engagement.

Thanks again for your feedback to the survey! We look forward to a continued focus on creating a strong culture of feedback and engagement.

# Engagement Ecosystem



# Cross-Functional Collaboration

## Senior Leaders

- Department heads collaborate to identify where silos exist and develop plans to improve cooperation
- Publicly recognize and celebrate examples of strong cross-functional collaboration
- Increase visibility of leadership within the organization across teams and groups
- Leverage results from service effectiveness surveys

## Organizational Support

- Align goals and metrics across departments – eliminate competing goals
- Leverage collaboration tech tools
- Create greater transparency and awareness of how teams depend on each other
- Consider cross-training or job shadowing to build understanding and empathy between groups
- Remove (or clarify) symbols of distrust – i.e. surveillance or micromanagement
- Create opportunities for people from different teams to interact socially

## Managers and Teams

- Expand the definition of “team” to include other teams and groups
- Speak positively about other teams and groups
- Role model collaboration between teams
- Understand shared objectives across team boundaries
- Talk about employee collaboration concerns during manager 1:1s

# Teamwork

## Senior Leaders

- Recognize examples of good teamwork
- Department heads collaborate to identify where silos exist and develop plans to improve cooperation
- Increase visibility of leadership within the organization across teams and groups

## Organizational Support

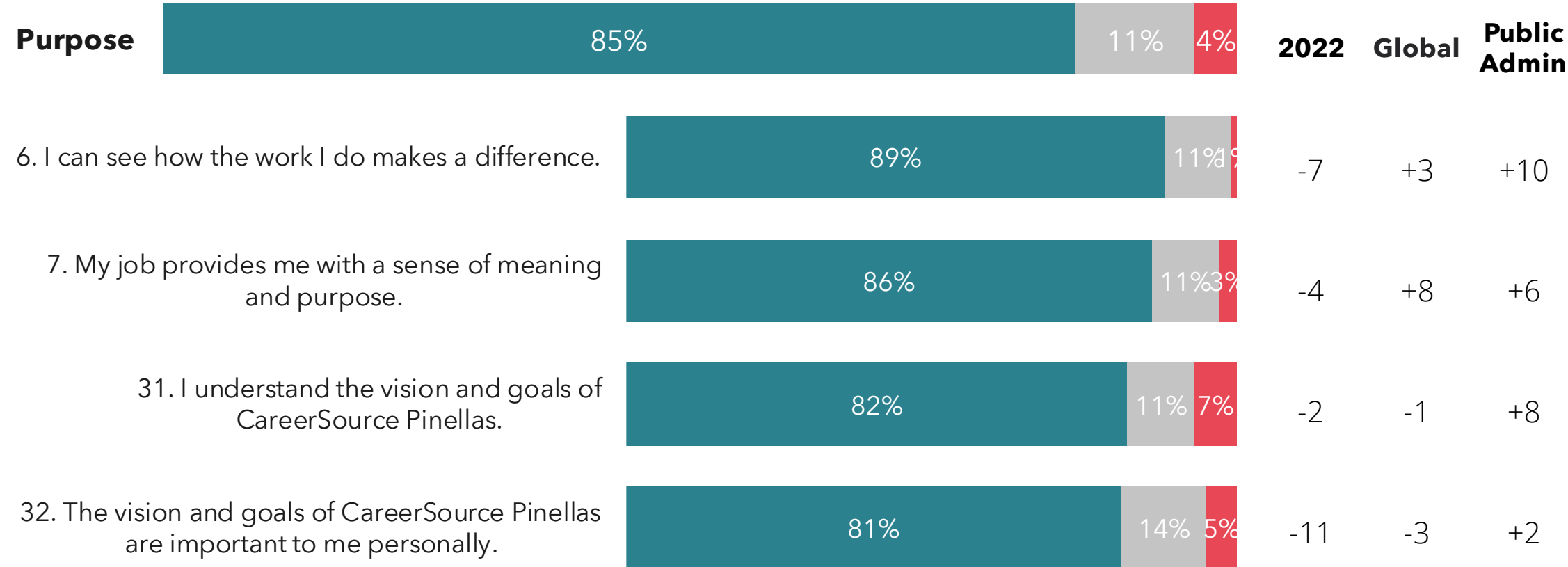
- Support systems and technologies that promote teamwork (Teams, Slack, etc.)
- Identify struggling teams and provide support
- Document best practices from your high-performing teams and share across the organization
- Provide training to managers on leading effective teams
- Create team competencies and behaviors with which to assess effectiveness of teams

## Managers and Teams

- Analyze the workflow of your team to identify inefficiencies or unnecessary steps
- Set and enforce accountability standards within the team
- Prioritize and distribute workload during team meetings
- Hold non-work-related team activities to increase connection
- Work individually with any disruptive team members

# Appendix

# Purpose Results



Favorable
Neutral
Unfavorable

# Global Benchmark Comparison

Survey Item	CareerSource Pinellas: Meier, Steven	Global	Delta ▲
7. My job provides me with a sense of meaning and purpose.	86%	78%	+8
37. CareerSource Pinellas attracts, develops, retains people with diverse backgrounds.	77%	72%	+5
44. CareerSource Pinellas is responsive to ideas and suggestions for improvement.	67%	63%	+4
13. Overall, I love my job.	81%	77%	+4
43. CareerSource Pinellas values employee input, feedback, and suggestions.	69%	66%	+3



# Public Administration Benchmark Comparison

Survey Item	CareerSource Pinellas: Meier, Steven	Public Administration	Delta ▲
37. CareerSource Pinellas attracts, develops, retains people with diverse backgrounds.	77%	54%	+23
44. CareerSource Pinellas is responsive to ideas and suggestions for improvement.	67%	48%	+19
40. CareerSource Pinellas communicates well with all employees about what is going on.	63%	45%	+18
43. CareerSource Pinellas values employee input, feedback, and suggestions.	69%	51%	+18
33. I feel comfortable in CareerSource Pinellas's culture.	71%	59%	+12

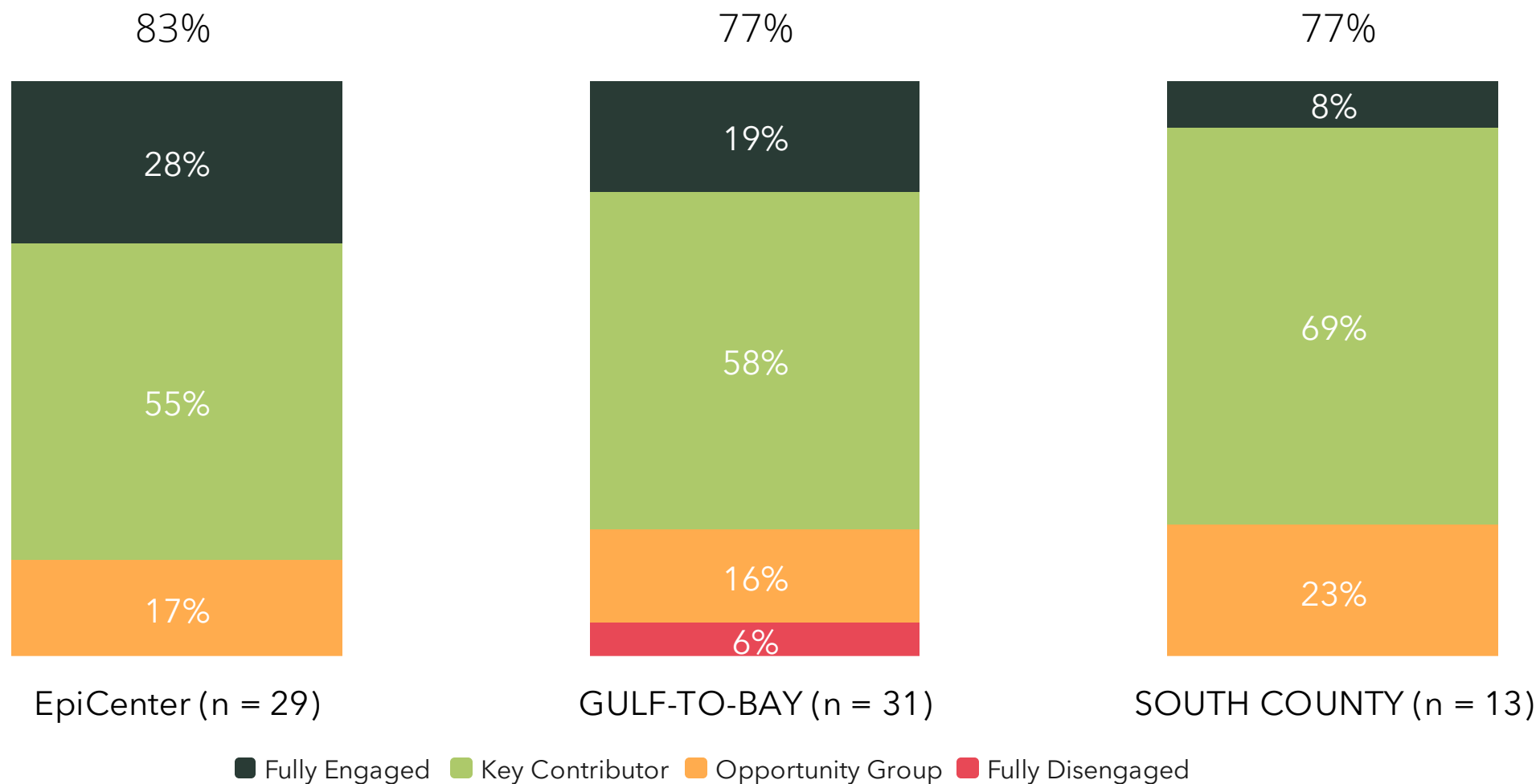
# Global Benchmark Comparison

Survey Item	CareerSource Pinellas: Meier, Steven	Global	Delta ▲
47. I am confident that CareerSource Pinellas has a successful future.	64%	84%	-20
17. The people I work with take accountability for results.	64%	81%	-17
38. Creating an inclusive environment is a priority for CareerSource Pinellas.	62%	76%	-14
35. CareerSource Pinellas cares about employees.	64%	76%	-12
51. I would recommend CareerSource Pinellas as a great place to work.	64%	76%	-12

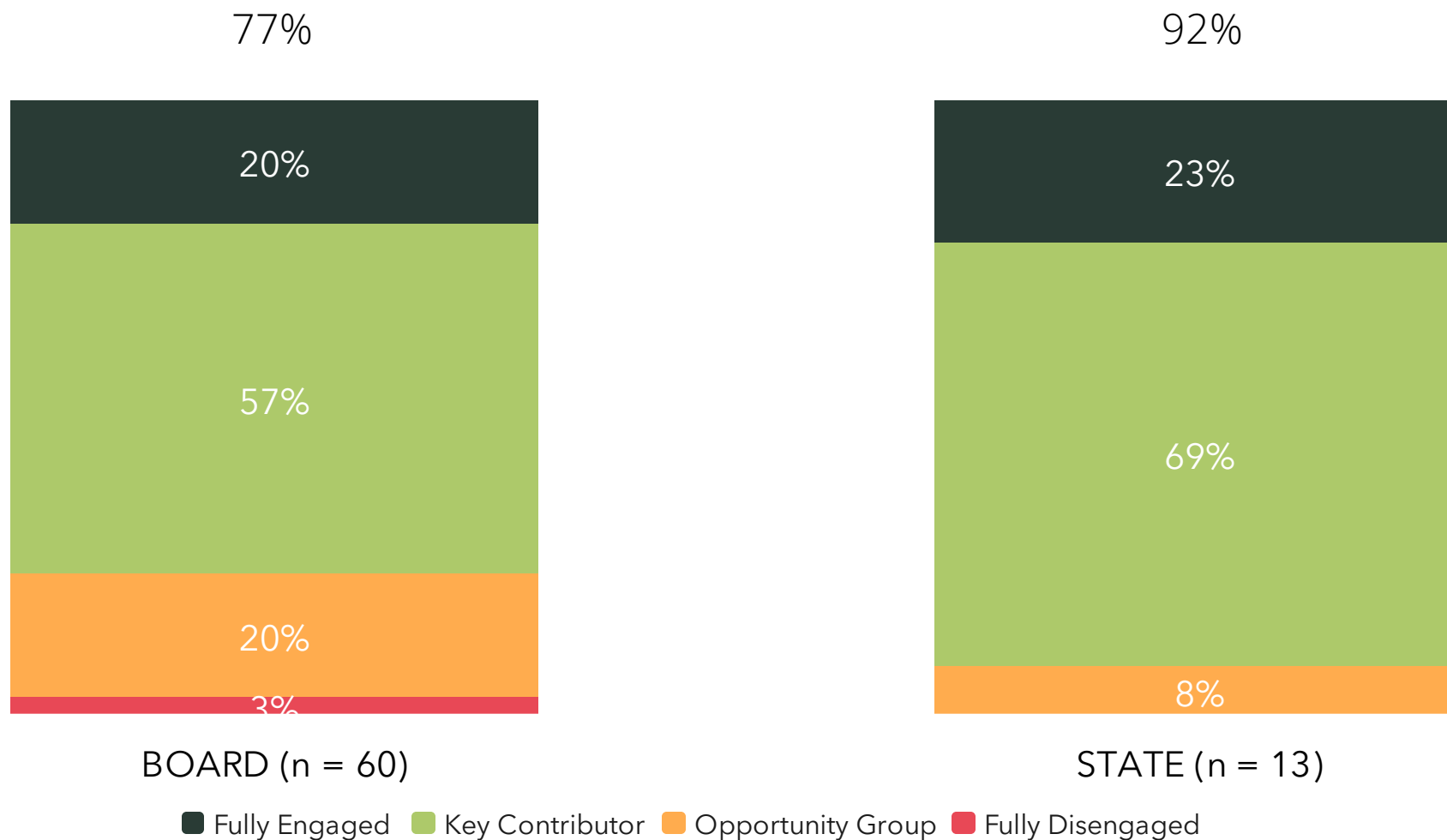
# Public Administration Benchmark Comparison

Survey Item	CareerSource Pinellas: Meier, Steven	Public Administration	Delta ▲
17. The people I work with take accountability for results.	64%	78%	-14
47. I am confident that CareerSource Pinellas has a successful future.	64%	76%	-12
39. We work effectively across departments and functions.	47%	57%	-10
2. I have received the training I need to do my job well.	67%	76%	-9
25. My supervisor cares about me.	75%	81%	-6

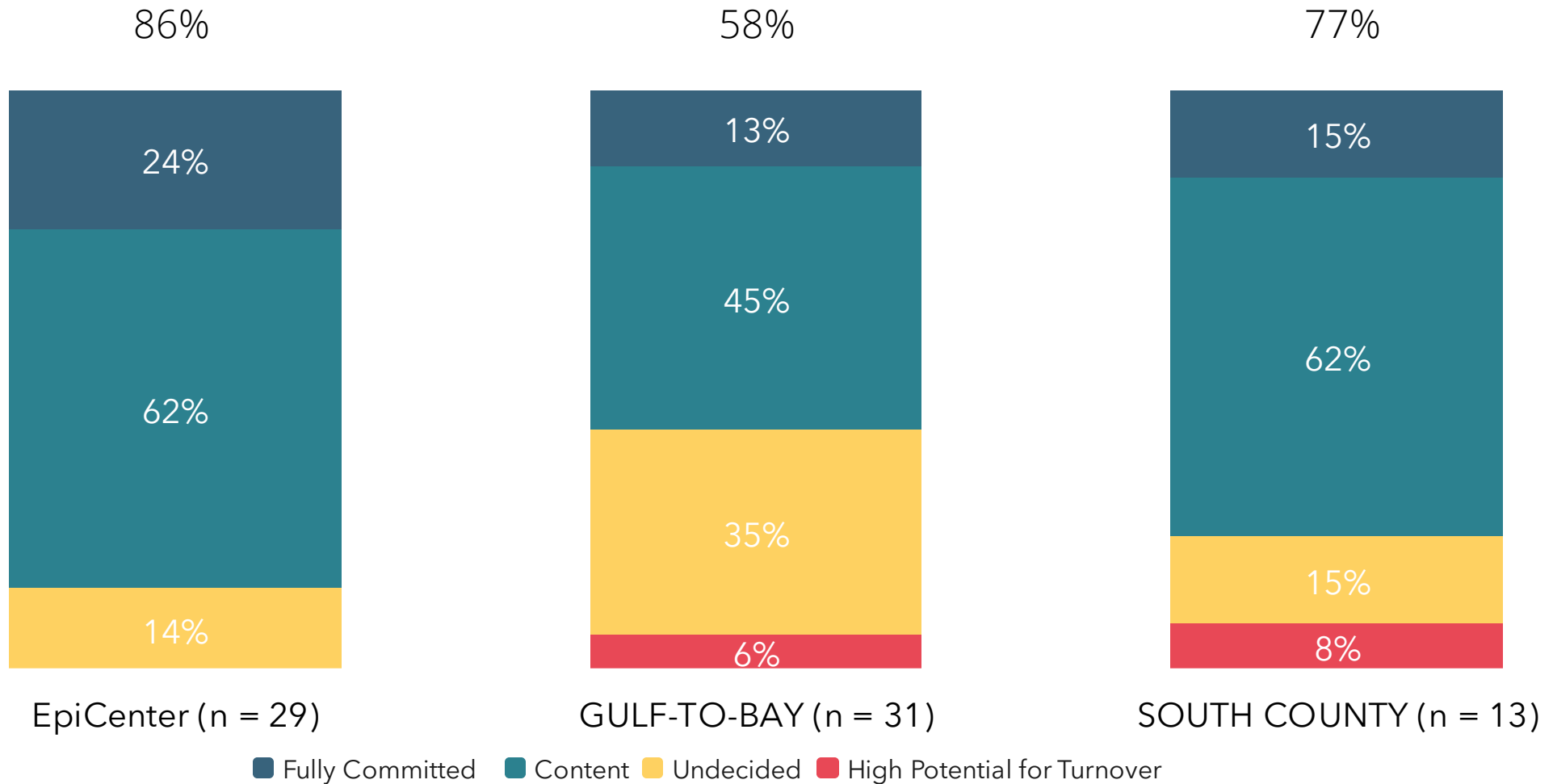
# CareerSource Pinellas 2023 Engagement Index Analysis By Location



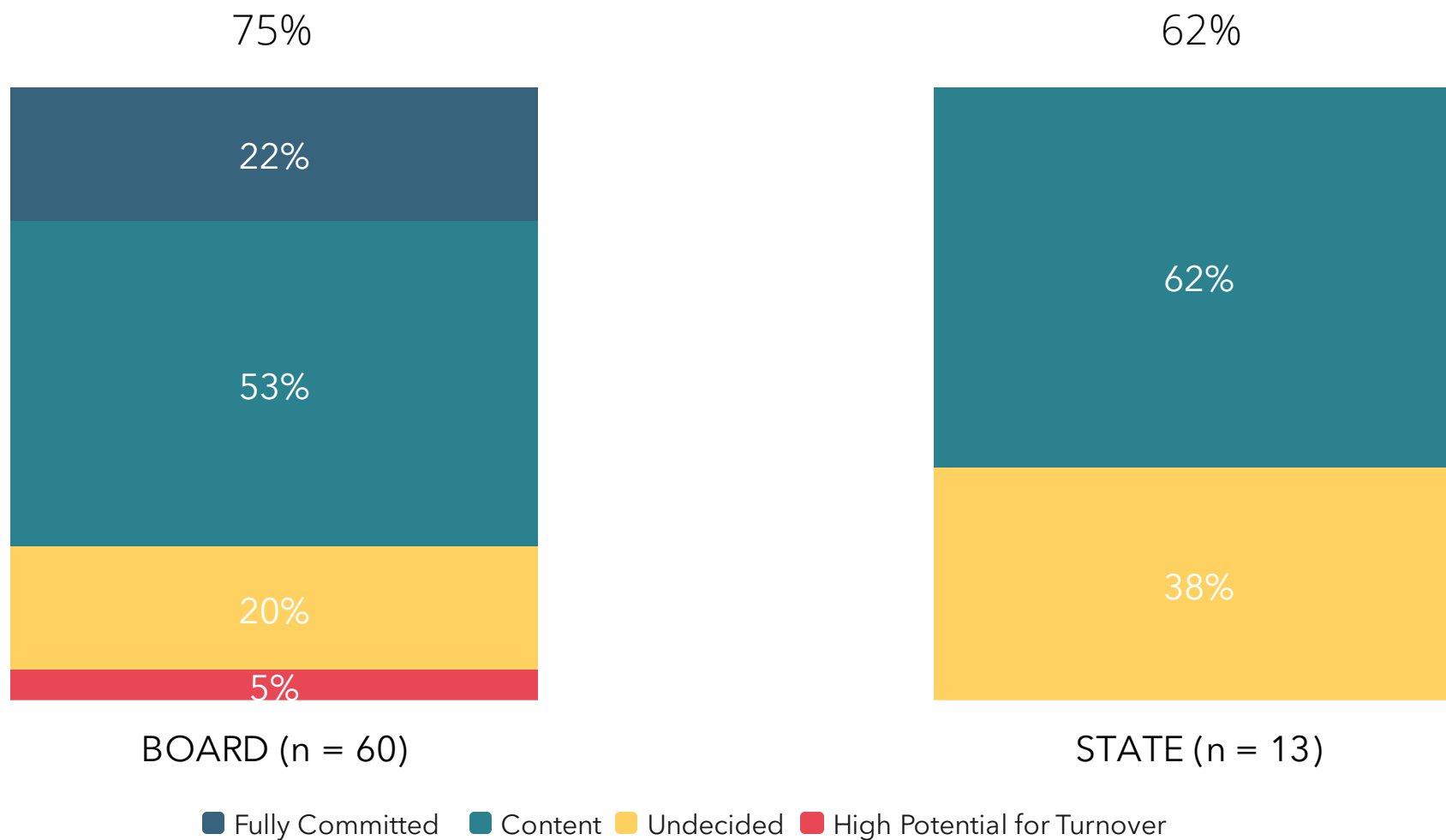
# CareerSource Pinellas 2023 Engagement Index Analysis By State/Board



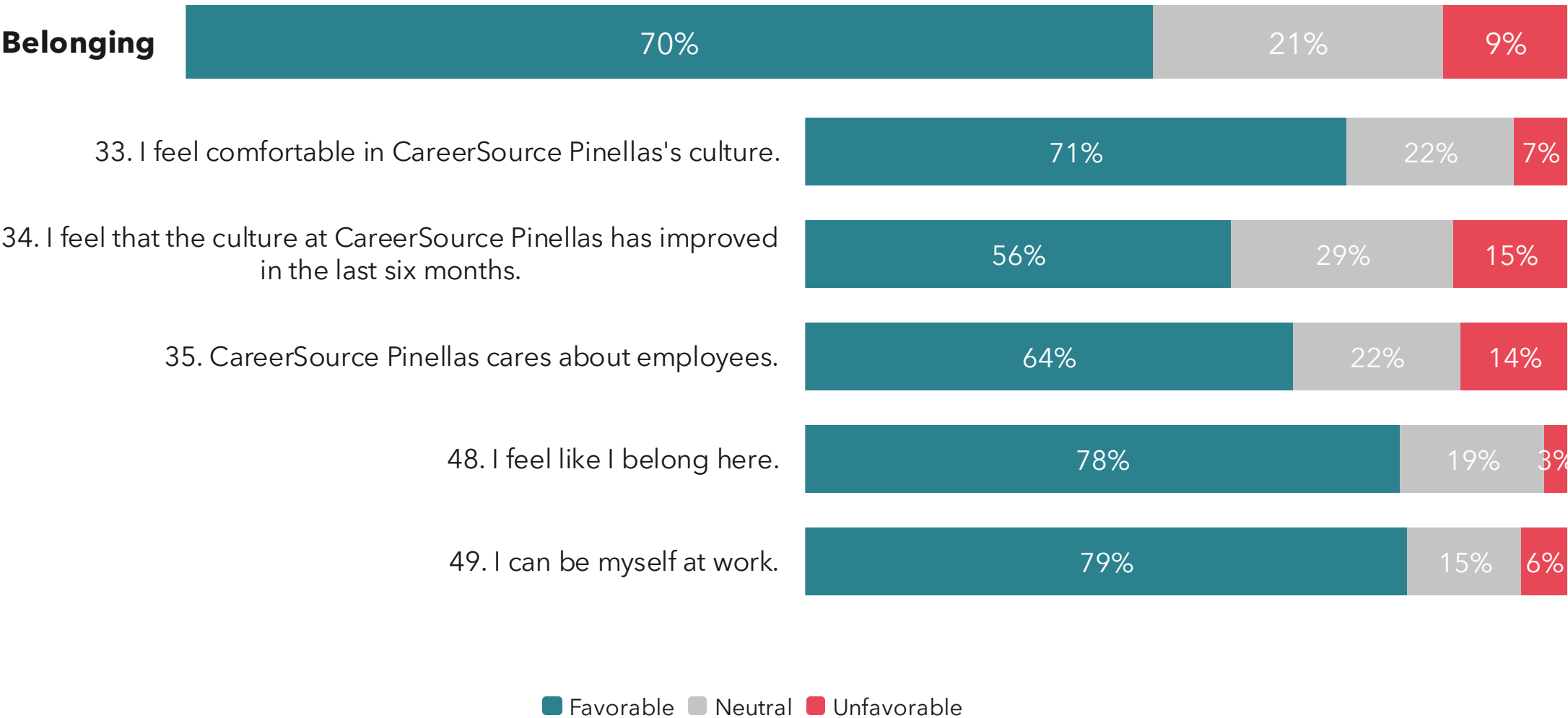
# Intent to Stay Analysis By Location



# Intent to Stay Analysis By State/Board

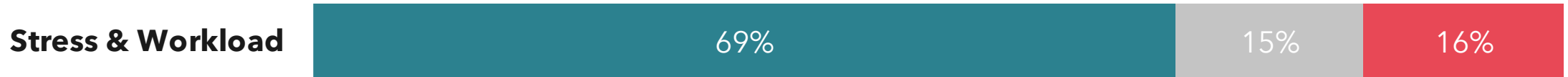


# Belonging Results



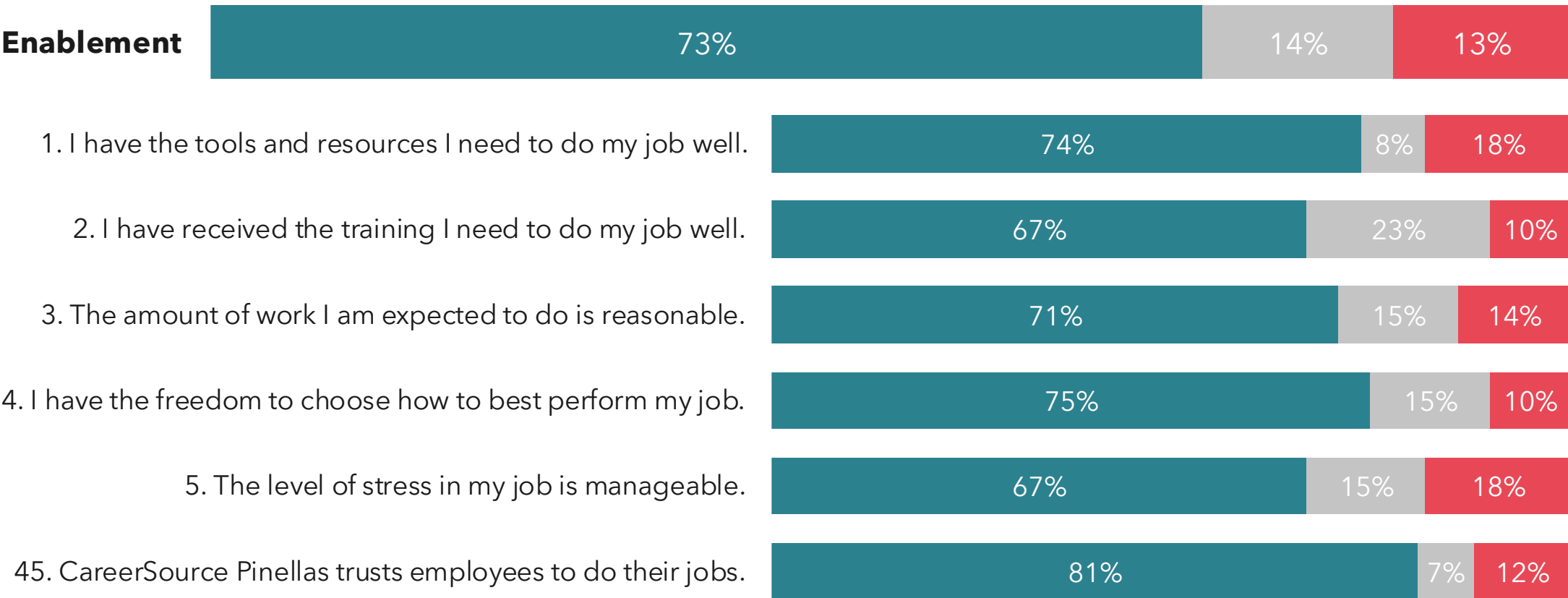


# Stress & Workload Results



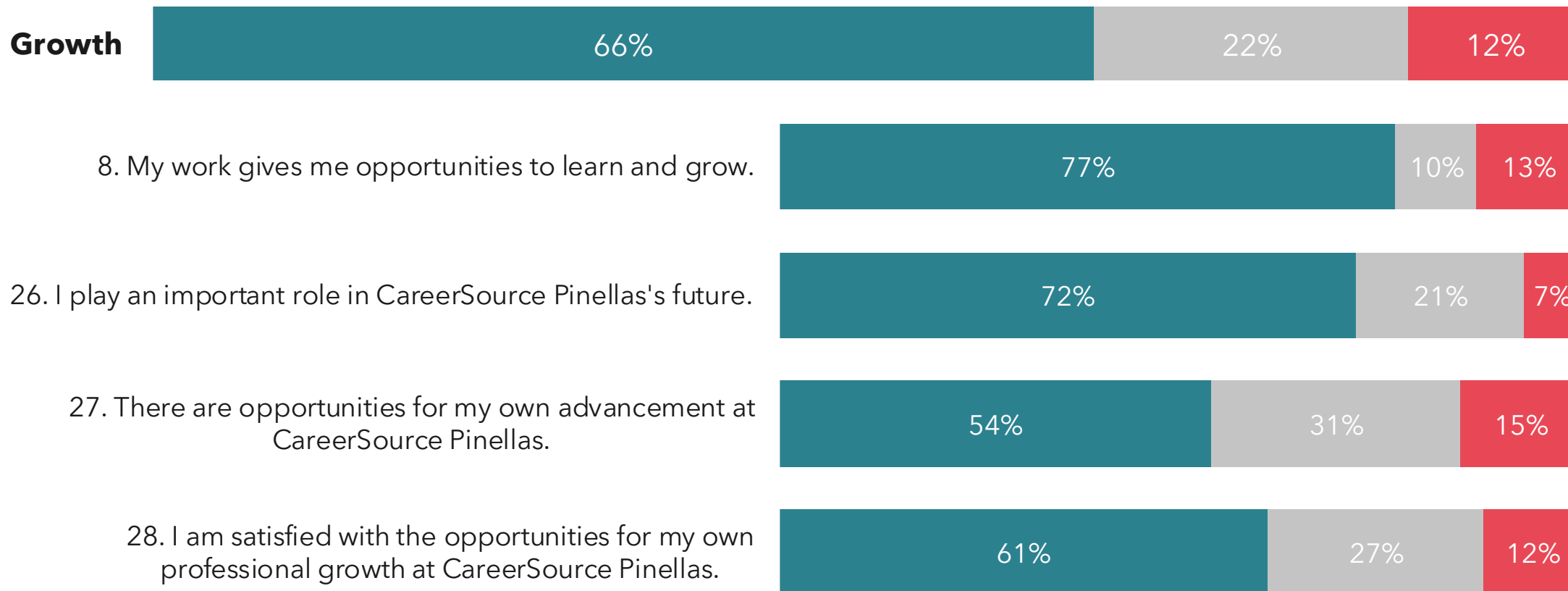
■ Favorable ■ Neutral ■ Unfavorable

# Enablement Results



■ Favorable ■ Neutral ■ Unfavorable

# Growth Results



■ Favorable ■ Neutral ■ Unfavorable

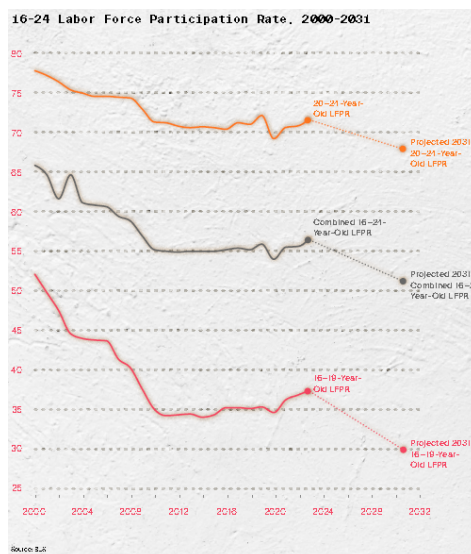


## INFORMATION ITEM 5

### Crafting Local Talent

Lightcast published a report in May 2023 related to accessing community's workforce with the workers that are already there. The report states:

- Employers continue to struggle to find workers in services, construction, healthcare, tech and many other industries.
- The workers are there. But they're not where we've historically looked and need to be engaged in new ways.
- Labor force participation rate in January 2023 was between 62% and 63%.
- Labor force participation rate for those age 55+ is less than 39%; the 55+ labor force has not returned since the pandemic.
- With births having been below the replacement rate (2.1 per woman) since the early '70s, there are fewer young people entering the workforce pipeline today.
- Missing workers, those that are out of the labor market but want a job, currently represent the largest untapped pool of talent in the US.



If the workers needed aren't coming back and aren't in the pipeline, can we find them anywhere?  
**THE ANSWER IS YES.**

#### Missing Workers

People who are out of the labor force but want a job.



## INFORMATION ITEM 5 (cont.)

### Crafting Local Talent

#### Job Search in the Past Year

Workers “marginally attached” to the labor force and have stopped searching due to a variety of reasons:

Discouraged Workers	Non-Discouraged Workers
• Face or expect young/old age discrimination	• Have family responsibilities
• Face other types of discrimination	• Are in school or pursuing training
• Lack necessary schooling/training	• Face ill health or a disability
• Believe no work is available in area of expertise	• Can’t arrange childcare
• Couldn’t find work	• Lack reliable transportation
	• Are conditionally interested

#### No Job Search in the Past Year

Abandoned job search amid the unique challenges of the pandemic (school or childcare closure, health concerns, etc.)

#### Overlooked Talent Pools

People with disabilities, history of incarceration, homeless status, etc.

**The number of missing workers exceeds the labor shortage.**





## **INFORMATION ITEM 5 (cont.)**

### **Crafting Local Talent**

Creating mechanisms to engage these missing and hidden workers is an opportunity for communities to ease the tight labor market.

#### **Build on the Existing Skills of Local Workers**

The majority of job growth a community experiences comes from within. This is why business retention and expansion efforts focus on providing existing businesses with the services and tools they need to grow.

1. Opportunity Occupations: jobs to move people into that show strong opportunity and are critical to the specific industry.
2. Transitional Occupations: jobs currently in high demand, but likely not of high long-term promise for workers due to lower wages, growth, and/or higher risk of displacement due to automation.
3. Upskill Occupations: jobs that tend to be entry-level and have lower wages, and don't show solid future opportunity, but could serve as springboards into better jobs if workers in them gain additional skills.

#### **Increase the Role of Apprenticeships and On-the-Job Training Programs**

- New apprenticeships have been expanding rapidly over the last 10 years.
  - In 2021, there were registered apprenticeships in 266 different occupations across 367 distinct industries.
  - More than 40% of those apprenticeships did not exist in 2010.
- Employers themselves have created informal apprenticeship-type training programs that cover an additional 208 occupations.
- Registered and informal apprenticeships now provide entry into 56% of all occupations.

Communities revitalizing their apprenticeship programs and models can expect at least three benefits:

- A reliable supply of talent to high-volume roles
- Talent with skills specific to local employers and industries
- A workforce more responsive to new jobs in the market

Most businesses, however, don't have experience creating and executing apprenticeships or in-house, work-based training programs.



## INFORMATION ITEM 5 (cont.)

### Crafting Local Talent

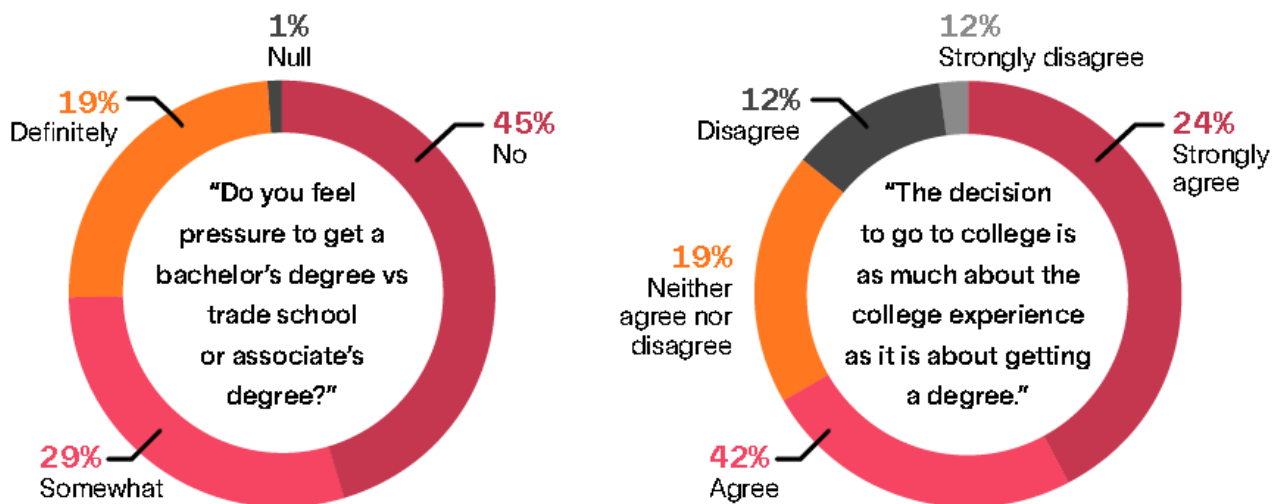
#### Seize the Opportunity to Engage Young Workers in the Skilled Trades

The raw number of 16-19 year-olds in the labor force has recovered to above pre-pandemic levels and 20-24-year-olds have recovered to a 20-year high. Young workers are being drawn into the workforce by higher wages as employers in industries such as service and retail seek to replace older workers.

Analyzing labor market data and survey data of 1,500 high school and college-age students, the research found that:

1. Students feel pressure from society, peers, and family to get a college degree.
2. The decision to go to college is as much about the experience as the degree.
3. Misperceptions remain about earnings and potential with skilled trade careers.

#### Pressures and perceptions about college



Source: Tallo/Lightcast Student Survey, 2022

#### Build and Create

But the workers we need are already in our communities. They may not be in the places we've traditionally looked—in college classrooms, across town at a competitor, or on the receiving end of a talent attraction campaign—but they are there.

**How as an organization, does CareerSource Pinellas engage these individuals?**





# Crafting Local Talent

Building Your Community's Workforce with the Workers You Already Have



[www.Lightcast.io](http://www.Lightcast.io)



# The Workers Are There

IN 2020, LIGHTCAST sounded the alarm about a pending labor shortage with [Demographic Drought](#). It revealed the lack of available workers was not merely a COVID-induced or short-term problem, but a perfect storm of demographic and economic trends decades in the making and with a decades-long impact. Since then, much ink has been spilt regarding the historically tight labor market.

If admitting there's a problem is the first step to finding a solution, that box has been checked. Communities and businesses are well aware of the problem, as employers struggle to find workers in services, construction, healthcare, tech, and many other industries.

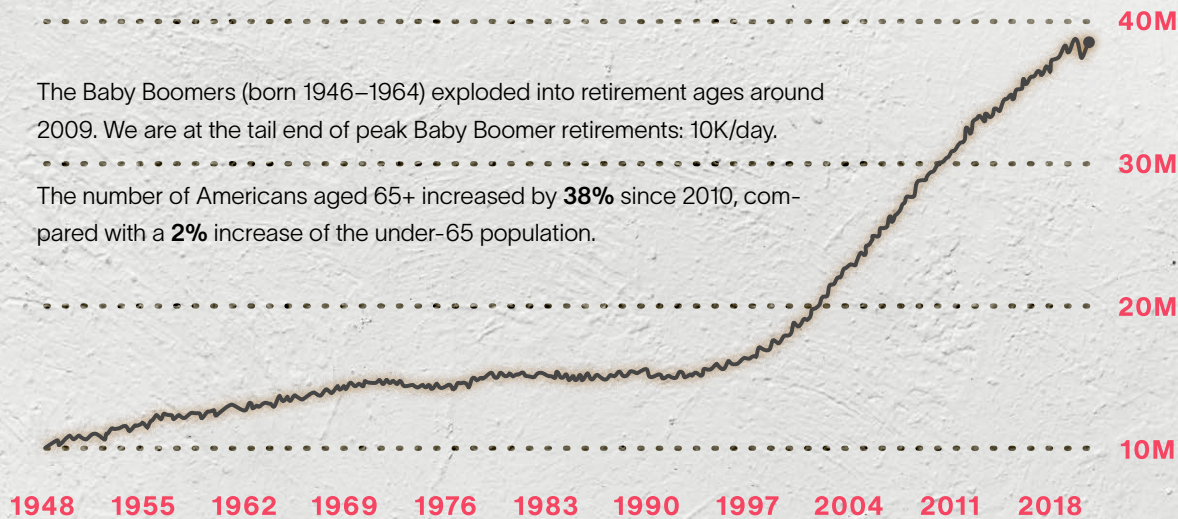
The workers, however, are there. But they're not where we've historically looked and will need to be engaged in new ways. Recognizing two realities of our current problem hastens the pace at which we seek new solutions.



## Retirement-Age Americans

The Baby Boomers (born 1946–1964) exploded into retirement ages around 2009. We are at the tail end of peak Baby Boomer retirements: 10K/day.

The number of Americans aged 65+ increased by **38%** since 2010, compared with a **2%** increase of the under-65 population.



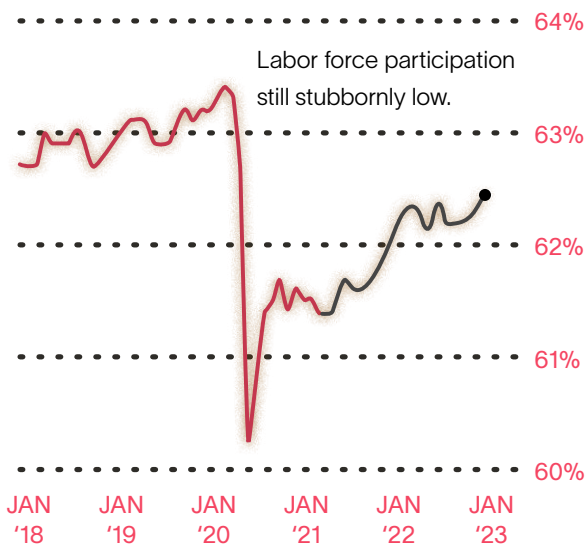
Source: BLS

## They Aren't Coming Back

The typical retiree isn't like your favorite athlete who calls it quits, only to come out of retirement for another season or two. Also, when a generation as large as Boomers reaches retirement age, even if some do re-enter the workforce, it's unlikely to tilt the scale. Simply put, retirees aren't coming back and aren't a viable long-term solution to labor market woes.

Furthermore, those workers that are coming back, whether retirement age or not, aren't coming back fast enough. The labor force participation rate still sits well below its pre-COVID level.

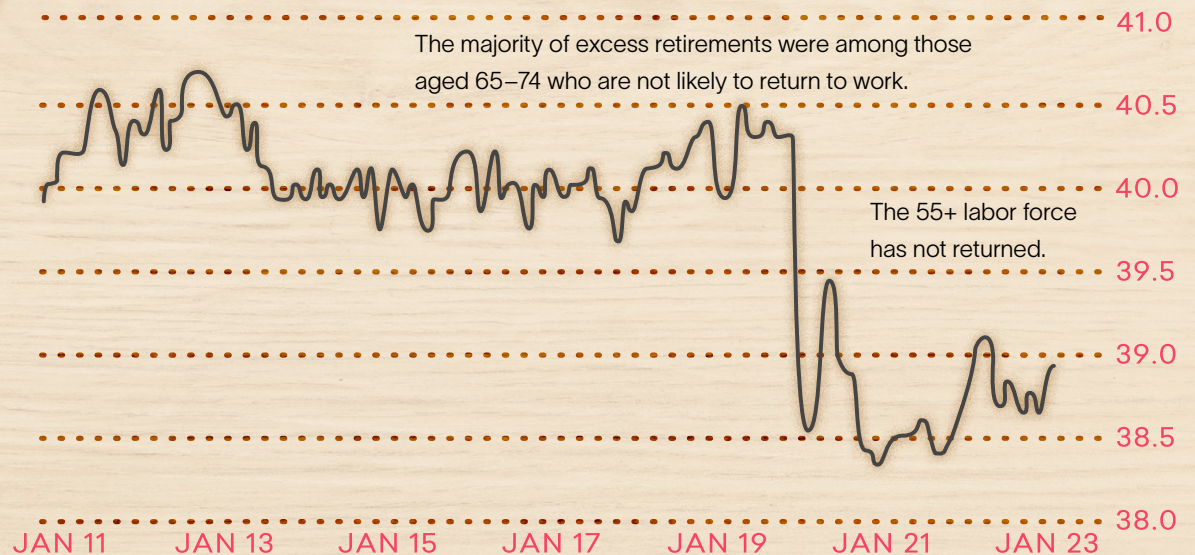
## Labor Force Participation Rate, 2018-23



Labor force participation still stubbornly low.

Source: BLS

## Labor Force Participation Rate, Age 55+



The majority of excess retirements were among those aged 65–74 who are not likely to return to work.

The 55+ labor force has not returned.

Source: BLS

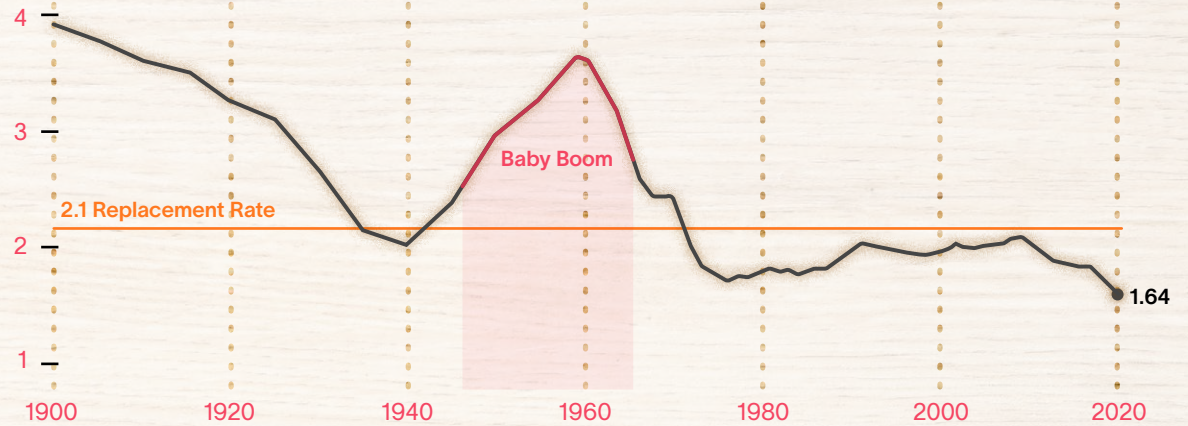


## They Aren't in the Pipeline

With births having been below the replacement rate (2.1 per woman) since the early '70s, there are fewer young people entering the workforce pipeline today.

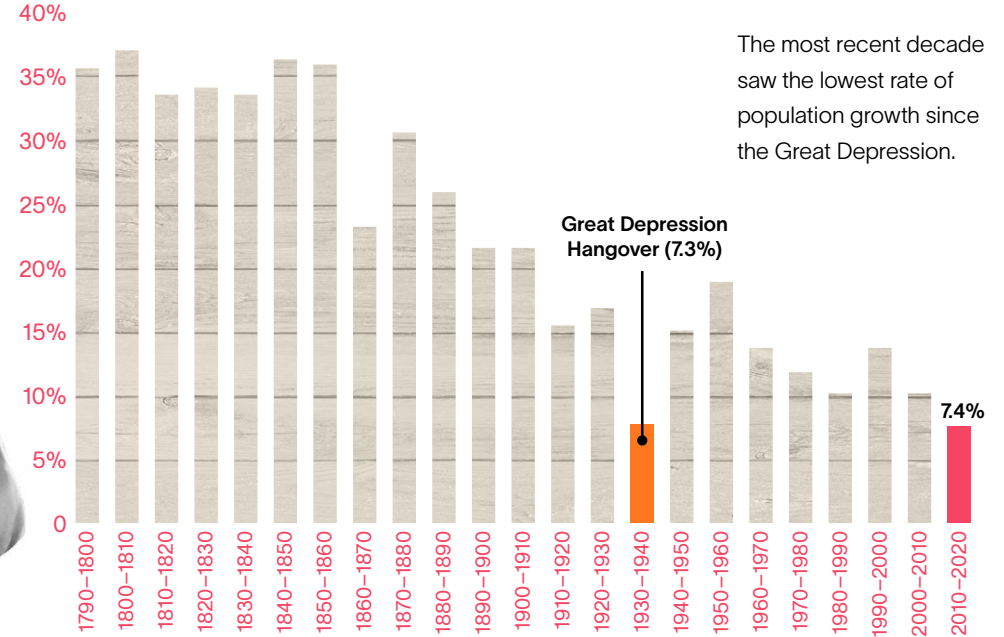
This low birth rate is slowing population growth with the 2010s decade particularly staggering. Not since the Great Depression, when people had fewer children because they weren't sure if they could feed them, has population growth slowed so dramatically.

Total Fertility Rate in the US, 1900-2020



Source: CDC National Vital Statistics

US Population Growth by Decade

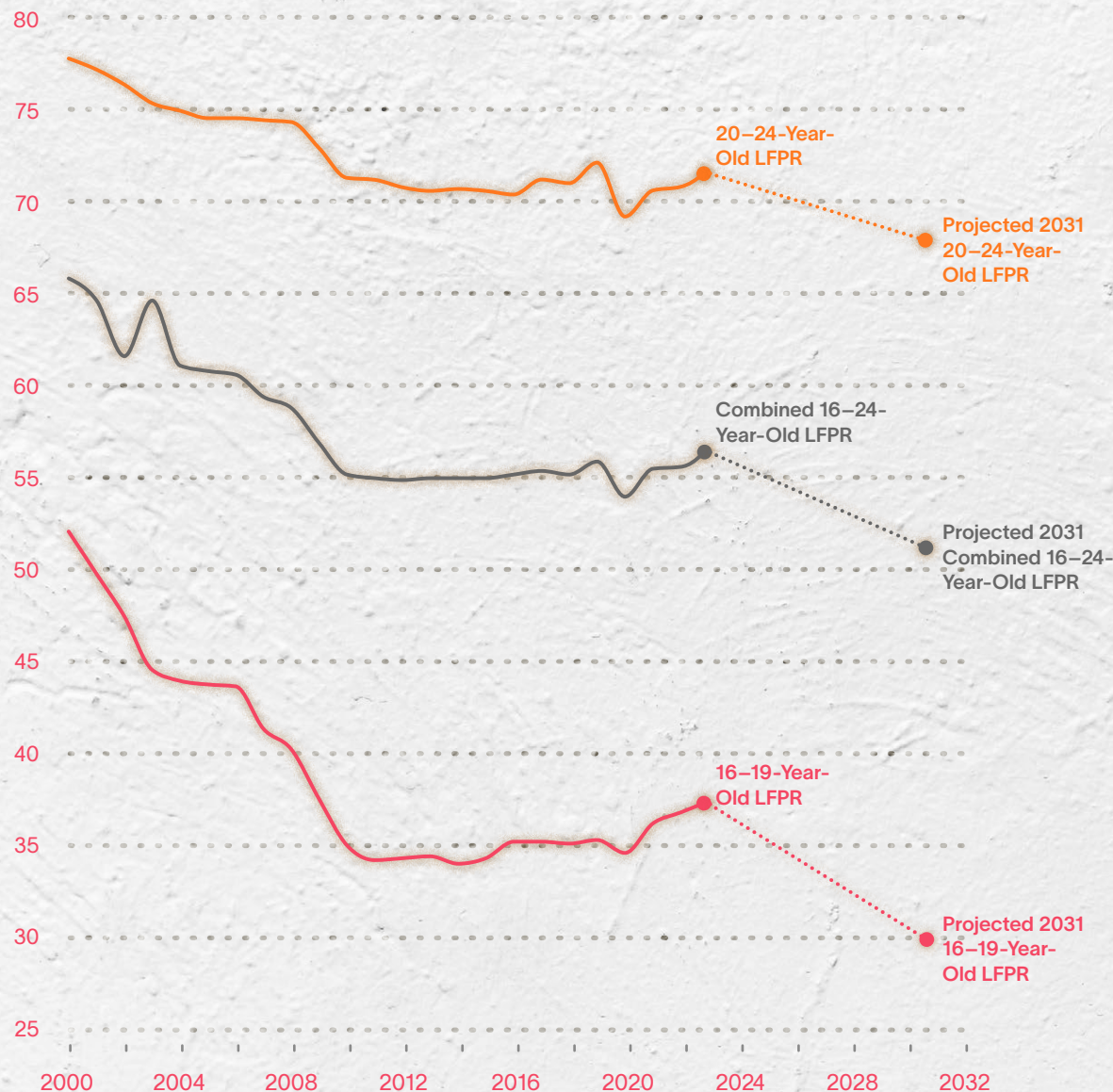


The most recent decade saw the lowest rate of population growth since the Great Depression.

Source: US Census Bureau



## 16-24 Labor Force Participation Rate, 2000-2031



Source: BLS

This dwindling pipeline is already being felt as younger working populations are drying up. The 55+ cohort is steadily growing while prime-age workers in the labor force has flattened. At the same time, the 16-24-year-old LFPR saw declines early in the century followed by a bit of a recovery in the last decade. But projecting out to 2031, the Bureau of Labor Statistics expects this cohort's LFPR to fall even more than the general LFPR (-1.6%).



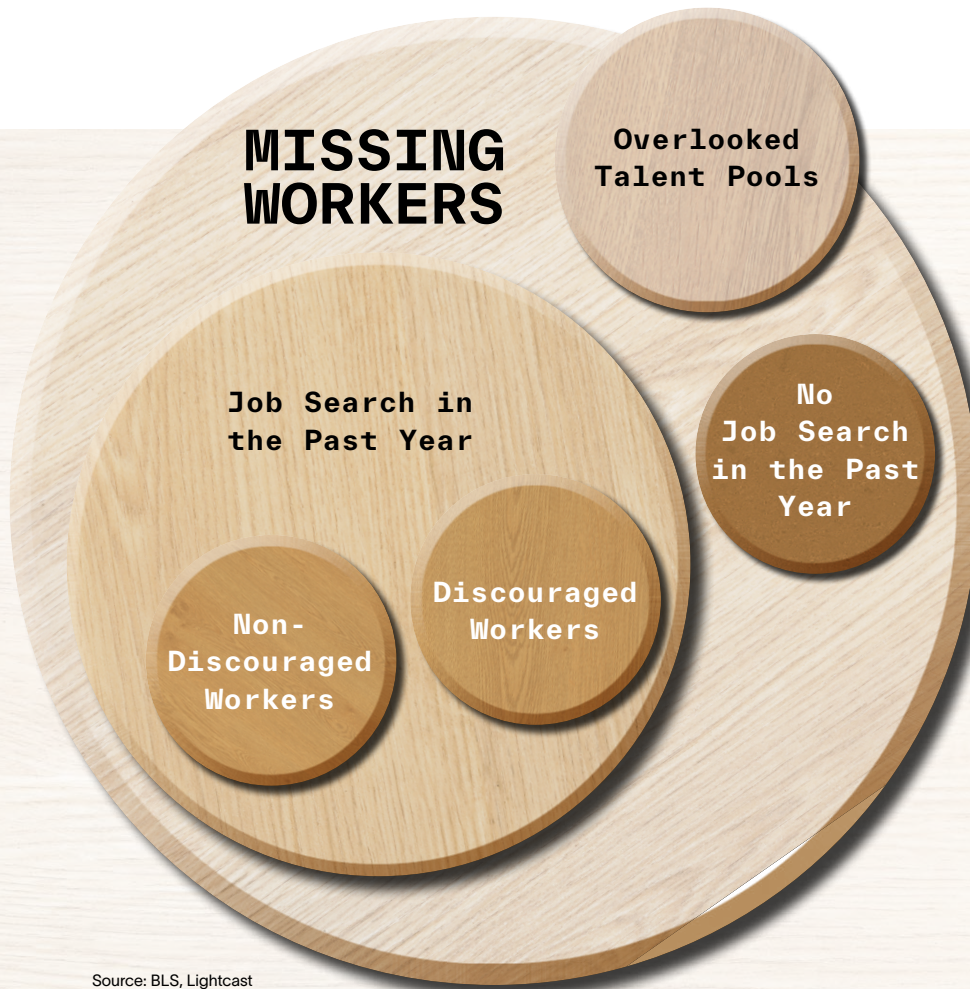
If the workers needed aren't coming back and aren't in the pipeline, can we find them anywhere?  
**THE ANSWER IS YES.**





# They Are Already in Your Community

THEY MAY NOT BE AS ABUNDANT as in past generations, but the talent local businesses are seeking is there, already in our communities. The work of economic and workforce development is to help reveal it. Much like how a craftsman creates a boat out of logs or a woodcarver creates a doll out of driftwood, this talent needs to be brought out.



Source: BLS, Lightcast

## 1 Bring Missing and Hidden Workers into the Market

Missing workers—those that are out of the labor force but want a job—currently represent the largest untapped pool of talent in the US. Within this large bucket of missing workers there are a few different categories. Of those that have searched for a job in the last year, the “marginally attached,” there are discouraged and non-discouraged workers. There are also those that have not searched for a job in the last year due to factors such as health or caring for an aging parent.



### Missing Workers

People who are out of the labor force but want a job

#### Job Search in the Past Year

Workers “marginally attached” to the labor force and have stopped searching due to a variety of reasons:

##### Discouraged Workers

- Face or expect young/old age discrimination
- Face other types of discrimination
- Lack necessary schooling/training
- Believe no work is available in area of expertise
- Couldn't find work

##### Non-Discouraged Workers

- Have family responsibilities
- Are in school or pursuing other training
- Face ill health or a disability
- Can't arrange child care
- Lack reliable transportation
- Are conditionally interested

#### No Job Search in the Past Year

Abandoned job search amid the unique challenges of the pandemic (school or child care closures, health concerns, etc.)

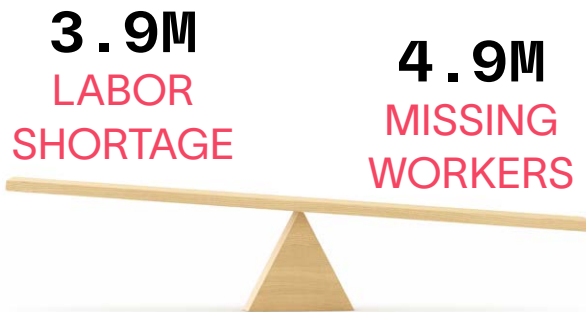
#### Overlooked Talent Pools

People with disabilities, history of incarceration, homeless status, etc.



## The number of missing workers exceeds the labor shortage.

Amazingly, if we were able to fully tap into missing workers, we could potentially end the labor shortage.



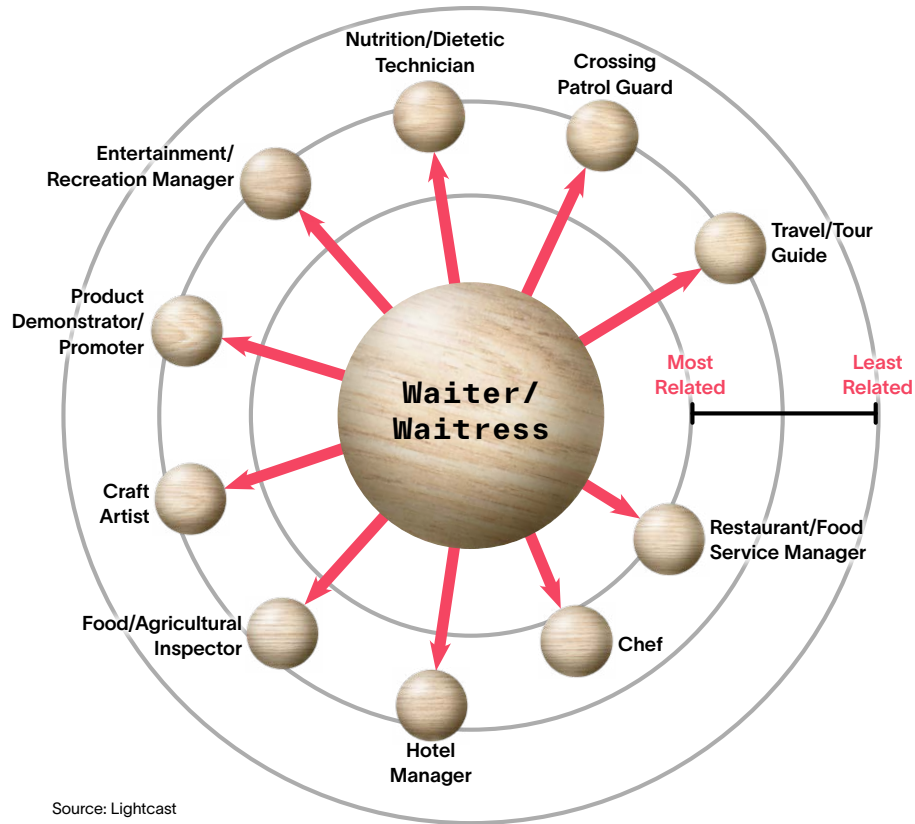
March 2023 job openings - April 2023 unemployed persons = labor shortage

Then there are hidden workers. These aren't workers hiding from work, but those who are often overlooked in the recruitment process. As [\*Hidden Workers: Untapped Talent\*](#) from Harvard Business School and Accenture notes, "They experience distress and discouragement when their regular efforts to seek employment consistently fail due to hiring processes that focus on what they don't have (such as credentials) rather than the value they can bring (such as capabilities)." These could be workers with a disability, the formerly incarcerated, the homeless, veterans, and others.

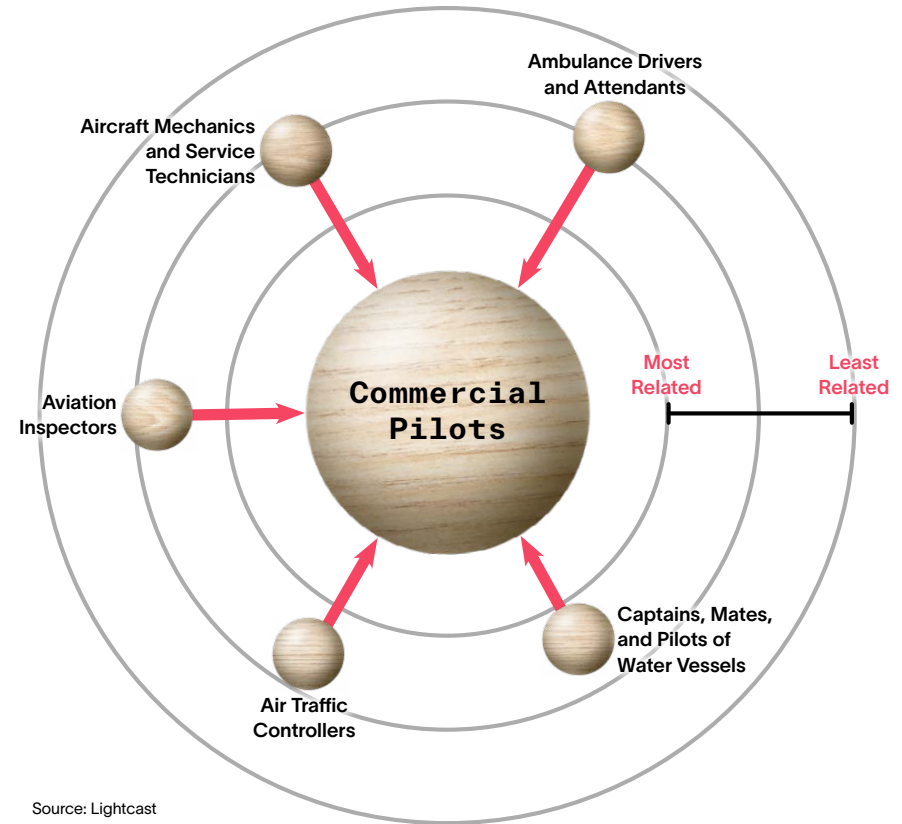
Creating mechanisms to engage these missing and hidden workers is an opportunity for communities to ease the tight labor market. This is an opportunity North County, CA (Carlsbad), seized. Teaming up with Bendable Labs and Lightcast, North County created the [\*Job-Readiness Room\*](#) in public libraries where entry-level jobseekers are matched to relevant career paths and online course material. Participants complete a free job-readiness microcredential in 15 hours, with a coach provided, that guarantees them a job interview with an employer in their chosen career path.



## NEXT-STEP ROLES for Waiters/Waitresses



## FEEDER ROLES for Commercial Pilots



## 2 Build on the Existing Skills of Local Workers

The majority of job growth a community experiences comes from within. This is why business retention and expansion efforts focus on providing existing businesses with the services and tools they need to grow. The same approach should be applied to local talent, too.

Attracting businesses has a place in an economic development strategy, and so does attracting talent. But just like with businesses, most talent growth is going to come from within, by building on the skills of local workers and

retaining existing talent. The most efficient way to do this is skills-based career pathing. Instead of working within degrees, specific industries, and conventional job tracks, a [skills-based pathway](#) uses job postings, real-world profiles, and skills data to show how workers can advance and succeed in the workforce.

Indy Partnership, the economic development wing of the Indy Chamber, is using this approach to hone in on the [workforce and skills needed to grow its target industries](#). They identified three types of occupations, charting the feeder and next step jobs of each.



1. **Opportunity Occupations:** jobs to move people into that show strong opportunity and are critical to the specific industry.
2. **Transitional Occupations:** jobs currently in high-demand, but likely not of high long-term promise for workers due to lower wages, growth, and/or higher risk of displacement due to automation.
3. **Upskill Occupations:** jobs that tent to be entry-level and have lower wages, and don't show solid future opportunity, but could serve as springboards into better jobs if workers in them gain additional skills.

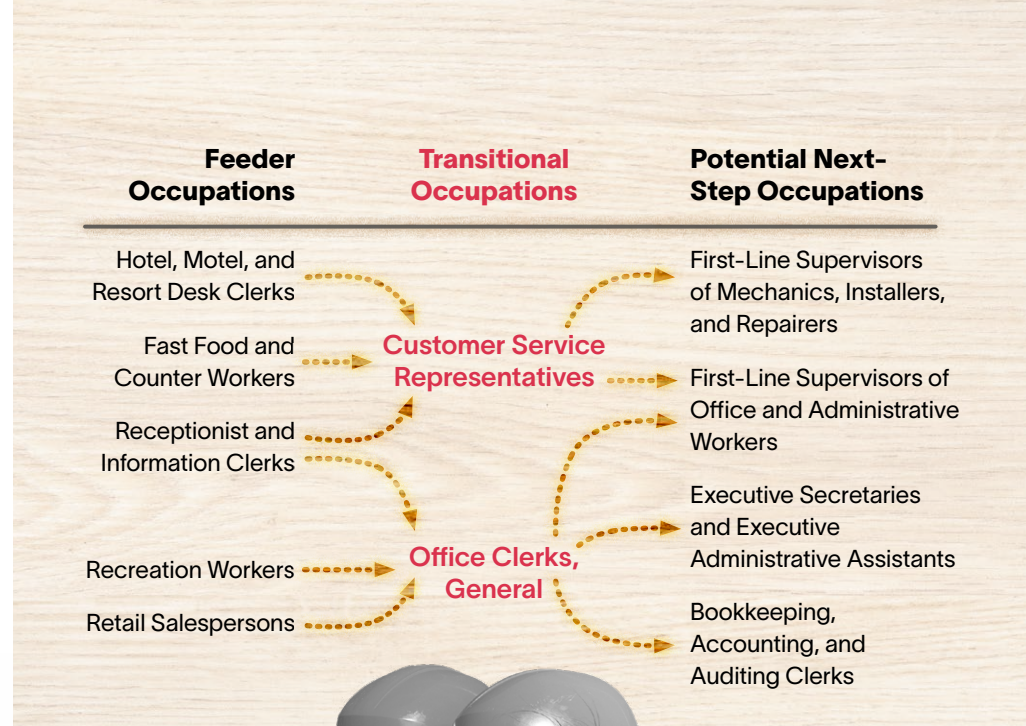
This approach enlarges the talent pool at a time when businesses need to cast a wider net. It also allows communities to see a full view of the local labor supply: who can fill vacant roles and who is a good skill fit to transition to high-demand roles.

### ③ Increase the Role of Apprenticeships and On-the-Job Training Programs

New apprenticeships have been expanding rapidly over the last 10 years. In 2021, there were registered apprenticeships in 266 different occupations across 367 distinct industries. More than 40% of those apprenticeships did not exist in 2010, and the vast majority of these new apprenticeships appeared after 2015. And these are just registered apprenticeships.

Employers themselves have created informal apprenticeship-type training programs that cover an additional 208 occupations, 120 of which are new since 2010, ranging from personal financial advisors to sales representatives.

These findings come from the Lightcast and Opportunity@Work joint report [\*The Changing Face of Apprenticeships: New Opportunities for Employers and STARs\*](#). The authors found that registered and informal apprenticeships now provide entry into 56% of all occupations.



#### REGISTERED APPRENTICESHIPS

meet Department of Labor requirements. There were approximately 240,000 new apprentices in 2021 and 600,000 total registered apprentices.

#### INFORMAL APPRENTICESHIPS

are not registered with the Department of Labor but are advertised as "apprentice," "apprenticeship," "in-training," or "trainee" in the job postings.



Historically, unions and Joint Apprenticeship and Training Committees (JATC) have led the charge on apprenticeships. However, employers are the primary sponsor of new registered apprenticeship programs, and these new apprenticeship programs are funneling workers into roles that previously required a college degree: 40% of workers in the new registered apprenticeship programs are going into jobs that used to require a bachelor's degree, compared to 2% of traditional apprenticeships. The result is notable growth in apprenticeship pathways for higher-wage roles in management, healthcare, and information technology.

Communities revitalizing their apprenticeship programs and models can expect at least three benefits:

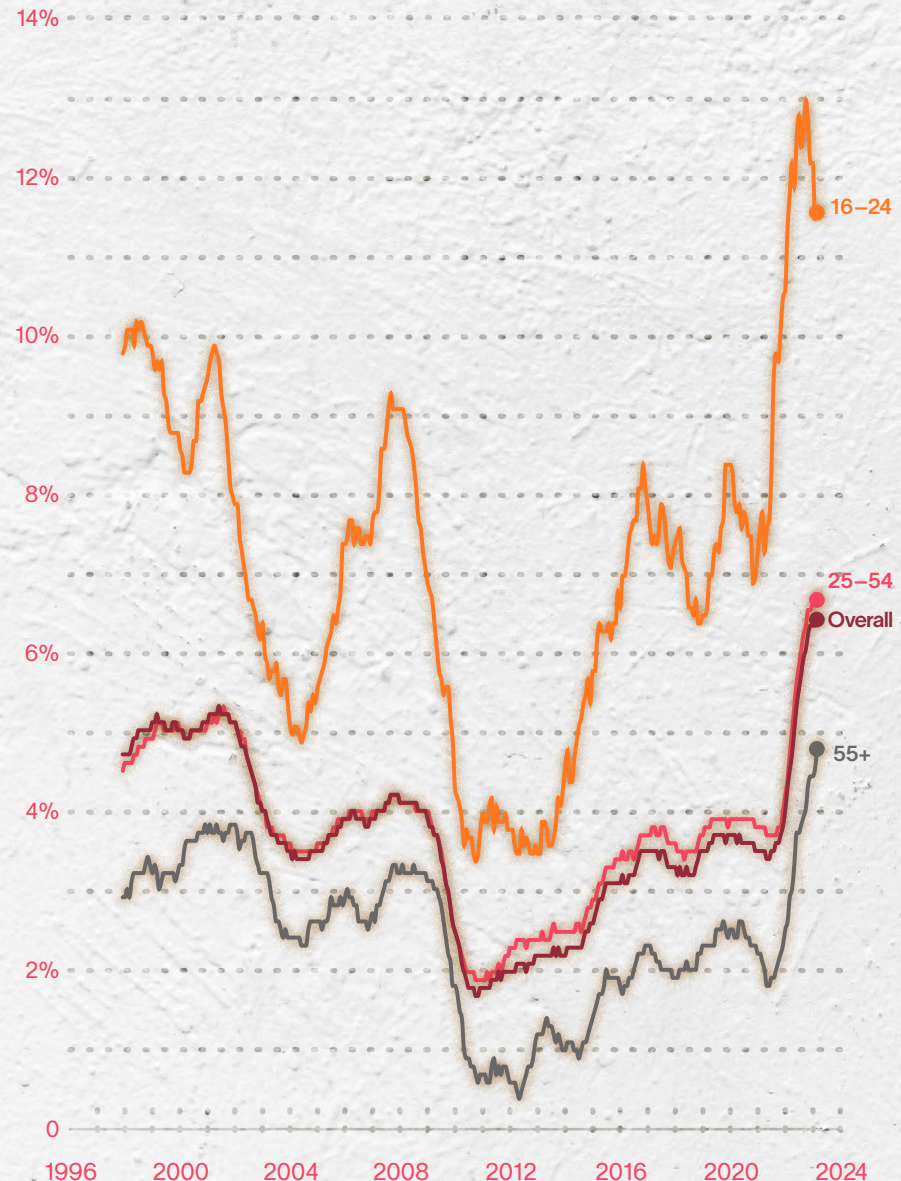
- A reliable supply of talent to high-volume roles
- Talent with skills specific to local employers and industries
- A workforce more responsive to new jobs in the market

Most businesses, however, don't have experience creating and executing apprenticeships or in-house, work-based training programs. This presents a huge opportunity for economic development organizations, chambers of commerce, workforce development agencies, and other business support groups to [help guide local businesses](#) in this strategy. This support is largely going to come in the form of creating partnerships that help establish new apprenticeships and expand existing ones.

#### 4 Seize the Opportunity to Engage Young Workers in the Skilled Trades

While the LFPR of young workers has been on a steady decline, they also represent one of the bright spots coming out of the pandemic. The raw number of 16-19 year-olds in the labor force has recovered to above pre-pandemic levels and 20-24-year-olds have recovered to a 20-year high. Young workers are being [drawn into the workforce by higher wages](#) as employers in industries such as service and retail seek to replace older workers.

Hourly Median Wage Growth by Age Group



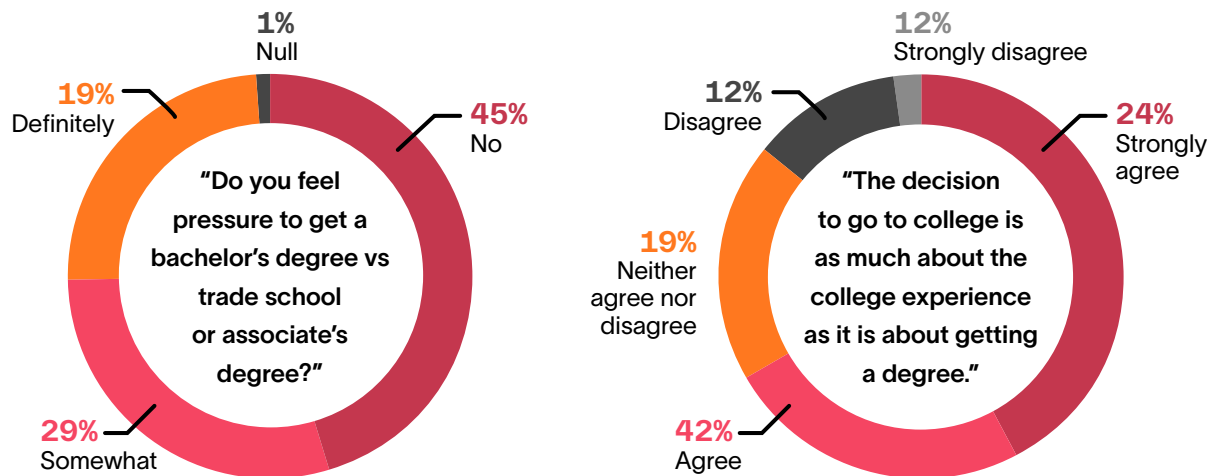
Source: BLS/Atlanta Fed

This is a welcome development as the majority of jobs open right now need to be filled by people without a college degree. A healthy regional economy needs workers from every education level, but our service economy is still primarily dependent on those with a high school diploma.

This misalignment of education and market demand raises the question of who is going to do the work? As many skilled trades and service jobs still go unfilled. Lightcast and talent connection firm Tallo sought to [answer this question](#) and discover what's keeping young people from entering community college or the skilled trades. Analyzing labor market data and survey data of 1,500 high school and college-age students, the research found that:

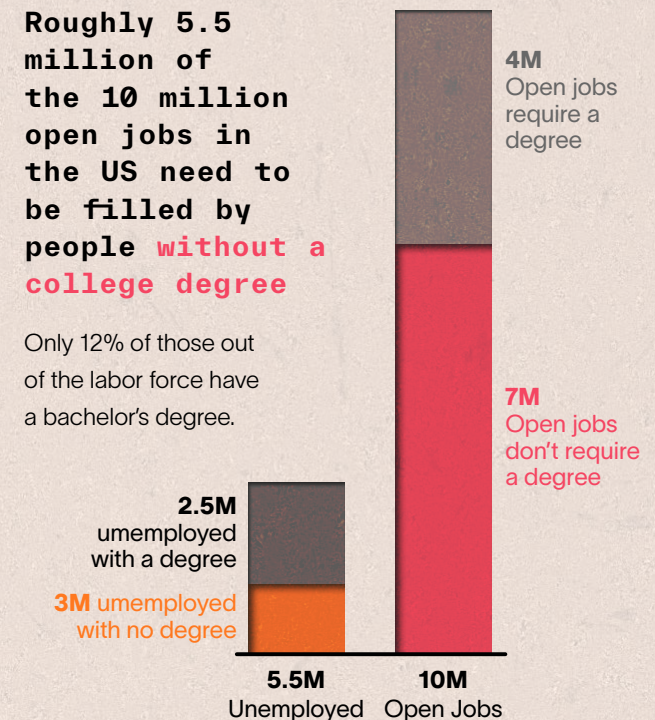
1. Students feel pressure from society, peers, and family to get a college degree
2. The decision to go to college is as much about the experience as the degree
3. Misperceptions remain about earnings and potential with skilled trade careers

### Pressures and perceptions about college

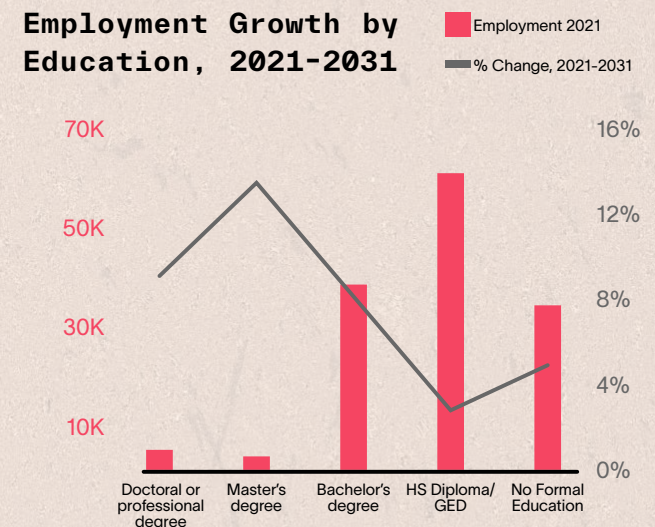


Source: Tallo/Lightcast Student Survey, 2022

In essence, skilled trades and any other non-degree occupation suffer from a marketing problem. But with a growing number of young people getting a taste of a paycheck and learning valuable communication and customer service skills, now is a great time to show them alternatives. Communities should



Source: Lightcast Analysis of BLS and JOLTS



Source: BLS



market to young people the benefits of a skilled trade or non-degree career just as much—perhaps more—as a career path requiring a college degree. These benefits include:

### Compensation & Experience

Careers in the trades provide a much quicker path to work experience and potentially higher wages. Additionally, these higher wages are not just in the short term, but over an entire career.

### Career Progression

Far from “dead-end” jobs, skilled trades offer a path from apprentice to senior-level in just a few years. Additionally, coupled with a business bootcamp program or courses at a community college, electricians, locksmiths, carpenters, and many others can create and run their own businesses.

### Value to Society

Few are more equipped to give back to their community, help disadvantaged populations, travel the world, and contribute to charitable agencies like those in the skilled trades.

### Ownership

If the career progression leads to ownership, people can gain real-world business skills such as pricing, scheduling, inventory management, negotiation, human resourcing, and many more. Furthermore, they gain freedom: work the hours they want, take vacation when they want, and, best of all, the amount they make is largely under their control.

Getting these messages to young people early and often will help dispel misconceptions about the skilled trades. Doing so will result in more young people opting for this pathway. This benefits the individual with a career that provides a high quality of life, and it benefits a community by helping fill the roles that provide the quality of life residents have become accustomed to.



# Build and Create

With Boomers hitting retirement age, individuals retiring during the pandemic and not returning, and a low LFPR not rebounding, the reality is that workers simply aren't coming back—or at least not as quickly as needed. Additionally, a half-century of births below the replacement rate means workers aren't in the pipeline.

But the workers we need are already in our communities. They may not be in the places we've

traditionally looked—in college classrooms, across town at a competitor, or on the receiving end of a talent attraction campaign—but they are there.

They're in a middle school shop class, an entry-level job gaining customer service skills, or may have dyslexia or autism and are part of a large overlooked talent pool. They may need to develop some transitional skills or participate in an on-the-job training program, but they are there. Communities

that are willing to look, recognize the potential, and work with them are like craftsmen who build and create from what they have.

As with any building, the right tools are needed. This may be [job postings data](#) to determine if local employers are altering their postings to attract missing and hidden workers, or it could be mapping [career pathways](#) to reveal qualified candidates for a role previously unknown to business or industry.

With the vision and right tools, communities can craft their workforce to meet demand and mitigate demographic changes. 🛠️



## Crafting Local Talent

Building Your Community's  
Workforce with the Workers  
You Already Have

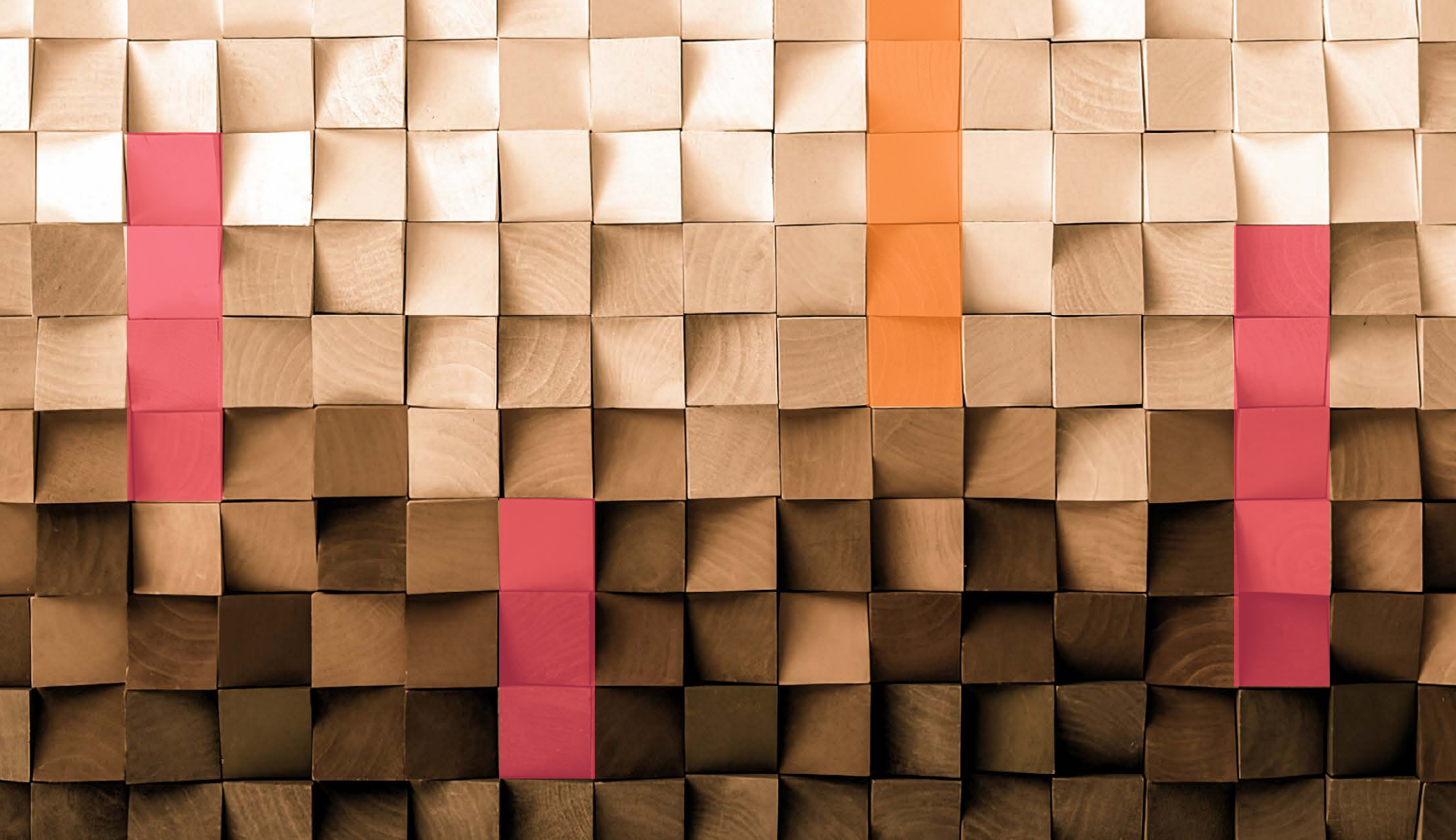
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## **INFORMATION ITEM 6**

### **Description of Funding Streams for 2023 - 2024**

#### **Workforce Innovation and Opportunity Act (WIOA)**

The Workforce Innovation and Opportunity Act (WIOA) effective July 1, 2015, supersedes the Workforce Investment Act (WIA) of 1998. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Three funding sources fall under WIOA : Adult, Dislocated Worker, and Youth. Career Services available in our Career Centers range from intake, assessment of skills, job search and placement assistance, and training services. Training, which is linked to job opportunities in our local area, may be provided through an individual training account (ITA), paid internship, or on-the-job training (OJT) to qualified customers who are not able to find employment. Florida Statutes states at least 50% of Adult and Dislocated Worker funds must be expended on ITAs. The law also allows for a regional workforce board to request a waiver from CareerSource Florida based on a sliding scale due to reduced funding levels. CareerSource Pinellas will be under a 35% waiver vs the 50% requirement for 2023-2024. Requirements for youth funding specify a minimum of 75% of youth funds are to be used for out-of-school youth 16-24 years of age. The Department of Commerce, formerly DEO, received a waiver from USDOL for a 50% minimum for out-of-school youth for program years 22 and 23 (July 1, 2021 – June 30, 2024). In addition, a minimum of 20% of youth funds are to be used toward paid internship or on-the-job training.

CareerSource Pinellas has full-service career centers in Clearwater and St. Petersburg. Other locations staffed to serve are in Tarpon Springs and Lealman. These locations all provide a broad range of services to the citizens and businesses in Pinellas County.

#### **WIOA Adult**

WIOA Adult program services include career services, training services, and job placement assistance. Priority is given to recipients of public assistance, other low-income individuals, veterans, and individuals who are basic skills deficient. Adults are defined as individuals over 18 years of age.

#### **WIOA Dislocated Worker**

WIOA Dislocated Worker program services target individuals who lost jobs due to plant closures, company downsizing or other significant change in market conditions. In most cases, eligible workers are unlikely to return to their occupations, and they must be eligible (or have exhausted) unemployment compensation. Dislocated workers are defined as individuals who become unemployed through no fault of their own, including displaced homemakers.



## **INFORMATION ITEM 6 (cont.)**

### **Description of Funding Streams for 2023 - 2024**

#### **WIOA Youth**

WIOA Youth program services both out-of-school youth, age 16 – 24, and in-school youth, age 14 – 21, with one or more barriers to employment. To assist with preparation for post-secondary education and employment opportunities, or to attain educational and/or skills training credentials. CareerSource Pinellas has contracted with SailFuture to be the provider of youth services for 2023-2024. In addition, Pinellas Education Foundation, was granted a no-cost extension to provide youth services through December 31, 2023, to expend funds in the contract that was set to originally expire on June 30, 2023.

#### **Temporary Assistance for Needy Families (TANF)**

Temporary Assistance for Needy Families (TANF), also known as the Welfare Transition grant, provides services to recipients of temporary assistance, their children and families, and to low-income persons in danger of entering welfare dependency. The goal of this program is to assist these persons in obtaining employment, leading to self-sufficiency. Clients require intensive services prior to obtaining viable employment as well as transitional assistance to assure job retention and the achievement of self-sufficiency.

#### **Reemployment Services and Eligibility Assessment (RESEA)**

A grant from USDOL provides re-employment and eligibility assessments to unemployment compensation claimants. The purpose of the project is to determine the effectiveness of more intensive services (in-person re-employment eligibility assessments) in helping claimants find employment, thereby resulting in shorter claims durations and fewer erroneous payments.

#### **Supplemental Nutrition Assistance Program – Employment and Training (SNAP)**

SNAP recipients without dependents receive assistance from CareerSource Pinellas with employment and training services to enable them to become self-sufficient. Beginning January 1, 2016, the State of Florida returned to mandatory participation for SNAP recipients.

This program funds the employment & training program for food stamp recipients. All recipients are to complete employment & training requirements in order to receive assistance that may include transportation, dependent care, books or training manuals, uniforms and/or other special tools.

#### **Get There Faster Grant**

Seeking to ensure more Floridians have access to education, training and good jobs, Get There Faster WIOA funding was made available to address priority commitments through competitive grant opportunities. Eligible applicants included local workforce development boards, state colleges and technical colleges. Applicants must have demonstrated how their proposed initiatives will be sustained to have long-term impact in enabling program participants to gain and retain employment and attain self-sufficiency.



## **INFORMATION ITEM 6 (cont.)**

### **Description of Funding Streams for 2023 - 2024**

#### **Get There Faster Grant**

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*Low-Income Returning Adult Learners* – Provide adults and youth seeking education and training the opportunity to earn industry-recognized cloud computing or other IT related credentials of value identified by the Florida Department of Education (FDOE). Through partnerships enabled among Florida's 48 technical colleges, 28 state colleges and/or 24 local workforce development boards, low income returning adult learners and youth who reside in high poverty Florida zip codes were prioritized for support to participate in an available postsecondary degree or non-degree training program or an apprenticeship program.

Grant applicants must demonstrate how they will provide the following services to low-income adult learners and youth:

- Enrollment in Amazon Web Services, CompTIA, Microsoft, and other certification programs, covering the cost of the certifications
- Employer engagement, including placement in jobs after completion
- Referrals to community partners for wrap-around services
- Support services to assist individuals in successful program completion, including but not limited to transportation and books/fees
- Work readiness activities, including soft skills training, interview techniques, etc.

#### **Substance Dependency Recovery Navigators**

Florida continues to face an ongoing health crisis with substance dependency disorders. This funding is used to expand efforts across the state to create and maintain linkages with addiction service providers and the workforce development system and build the capacity of staff of local workforce development boards and their partners to provide meaningful services to individuals in recovery so that job seekers with substance use disorders may obtain employment that leads to self-sufficiency. Additionally, the funds will be used to work with employers and provide technical assistance regarding hiring and retaining workers in recovery and existing staff with substance use disorders.





## **INFORMATION ITEM 6 (cont.)**

### **Description of Funding Streams for 2023 - 2024**

#### **WIOA – Rapid Response**

State level WIOA funds provided to Boards to implement a comprehensive, proactive Rapid Response system with an emphasis on layoff aversion activities that dedicate resources and efforts to:

- Strategic planning, business intelligence data gathering, and analysis designed to predict, prepare for and mitigate layoff events
- Strategies designed to maintain effective business engagement
- Outreach and education regarding the provision of comprehensive, employer-based layoff aversion services
- Establishing early warning systems to identify businesses that may be a risk of closing

#### **Wagner-Peyser**

The Wagner-Peyser Act of 1933 established a nationwide system of public employment offices known as the Employment Service. The Act was amended in 1998 to make the Employment Service part of the One-Stop services delivery system. The One Stop delivery system provides universal access to an integrated array of labor exchange services so that workers, job seekers, and businesses can find the services they need in one stop and under one roof in easy-to-find locations.

The Employment Service focuses on providing a variety of employment-related labor exchange services including, but not limited to, job search assistance, job referral, and placement assistance for job seekers, re-employment services to unemployment insurance claimants, and recruitment services to employers with job openings.

Services are delivered in one of three modes including self-service, facilitated self-help services, and staff assisted service delivery approaches.

#### **Disabled Veterans' Outreach Program (DVOP)**

Disabled Veterans' Outreach Program (DVOP) provides job and training opportunities for Veterans, with special emphasis on Veterans with service-connected disabilities. DVOP specialists provide direct services to Veterans enabling them to be competitive in the labor market. They provide outreach and offer assistance to disabled and other Veterans by promoting community and employer support for employment and training opportunities, including apprenticeship and on-the-job training.

#### **Local Veterans' Employment Representatives (LVER)**

The Local Veterans Employment Representatives program conducts outreach to employers to increase the employment opportunities available to veterans and encourage the hiring of Veterans. The program services include job development, job placement, and supportive employment services to qualified veterans.



## **INFORMATION ITEM 6 (cont.)**

### **Description of Funding Streams for 2023 - 2024**

#### **Trade Adjustment Act (TAA)**

Trade Adjustment Assistance Program (TAA) is a federally funded program designed to allow eligible trade-affected workers to receive retraining and reemployment opportunities. The TAA program seeks to provide these trade-affected workers with opportunities to obtain the skills, resources, and support they need to become reemployed. The program was sunsetted on July 1, 2022, but participants already in the program as of that date, with an open “petition” could continue until their training was complete.

*Grant to be awarded in 2023-2024:*

#### **Hope Florida – A Pathway to Promise Initiative (HOPE Navigators)**

The Hope Florida – A Pathway to Promise initiative would be the latest expansion of the overarching, statewide Hope Florida – A Pathway to Prosperity initiative that was launched in 2020 as a pilot program by the Florida Department of Children and Families (DCF). Hope Florida – A Pathway to Promise would focus on enhancing collaboration between the CareerSource Florida network and DCF to help Floridians achieve self-sufficiency through employment, training and support services.

Hope Florida – A Pathway to Prosperity is a comprehensive approach to addressing poverty and promoting economic mobility in Florida. Through this initiative, DCF is guiding Floridians on an individualized path to prosperity, economic self-sufficiency and hope by focusing on community collaboration among the private sector, faith-based community organizations, non-profits and government entities to break down silos and connect Floridians to resources that lead to stability and new economic opportunities.

Hope Florida – A Pathway to Promise would strengthen coordination between the Department of Children and Families and Florida’s local workforce development boards to better assist eligible Floridians with overcoming barriers to education, training and employment. Under the Hope Florida – A Pathway to Promise initiative, a referral process involving regional DCF offices and local workforce development boards would be developed and specialized services and programming would be available using these funds to help Hope Florida program participants find jobs, enroll in training and launch new career pathways that lead to self-sufficiency and economic prosperity.

Local workforce development boards also would be able to refer potential clients in need of immediate support to address barriers and challenges not related to employment to DCF to access resources that are beyond the allowability of WIOA funding.

# Workforce Innovation and Opportunity Act

## WIOA Youth Program

**Program Description:** Under Title I of the Workforce Innovation and Opportunity Act of 2014, the WIOA Youth program provides funds to states and outlying areas. States provide local workforce development areas resources to deliver comprehensive youth services that focus on assisting out-of-school youth and in-school youth, with one or more barriers to employment, prepare for employment and postsecondary education opportunities; attain educational and/or skills training credentials; and secure employment with career/promotional opportunities.

**Services:** The WIOA Youth program includes the following program elements: tutoring; alternative secondary school services; paid and unpaid work experiences, which include: summer and year round employment opportunities, pre-apprenticeship programs, internships and job shadowing, and on-the-job training; occupational skill training; education offered concurrently with workforce preparation and training; leadership development opportunities; supportive services; mentoring; follow-up services; comprehensive guidance and counseling; financial literacy education; entrepreneurial skills training; services that provide labor market and employment information; and postsecondary education and training preparation activities.

### **Eligibility/Target Population: Out-of-school youth (OSY) and in-school youth (ISY)**

An OSY is an individual who is:

- (a) Not attending any school (as defined under State law);
- (b) Not younger than age 16 or older than age 24 at time of enrollment; and
- (c) One or more of the following:
  - (1) A school dropout;
  - (2) A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter;
  - (3) A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is either basic skills deficient or an English language learner;
  - (4) An offender;
  - (5) A homeless individual, a homeless child or youth, or a runaway;
  - (6) An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement;
  - (7) An individual who is pregnant or parenting;
  - (8) An individual with a disability; or
  - (9) A low-income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

An ISY is an individual who is:

- (a) Attending school (as defined by State law), including secondary and postsecondary school;
- (b) Not younger than age 14 or (unless an individual with a disability who is attending school under State law) older than age 21 at time of enrollment;
- (c) A low-income individual; and
- (d) One or more of the following:
  - (1) Basic skills deficient;
  - (2) An English language learner;



# Workforce Innovation and Opportunity Act

- (3) An offender;
- (4) A homeless individual, a homeless child or youth, or a runaway;
- (5) An individual in foster care or who has aged out of the foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement;
- (6) An individual who is pregnant or parenting;
- (7) An individual with a disability; or
- (8) An individual who requires additional assistance to complete an educational program or to secure or hold employment.

**Priorities:** *Out-of-School Youth* – A minimum of 75 percent of the Youth funds allocated to States and local areas, except for the local area expenditures for administration, must be used to provide services to OSY.  
*Work Experience* – Not less than 20 percent of Youth funds allocated to the local area, except for the local area expenditures for administration, must be used to provide paid and unpaid work experiences.  
*Focus on Partnering* – Co-enrollment encouraged where appropriate with Titles II and IV.

**Allotments:** The allotment is based on formula provisions including three factors: (1) the number of unemployed in areas of substantial unemployment; (2) the number of excess unemployed individuals; and (3) the number of economically disadvantaged youth.

## WIOA Youth Appropriation by Program Year

PY 2023	\$948,130,000
PY 2022	\$933,130,000
PY 2021	\$921,130,000
PY 2020	\$913,130,000

## WIOA Youth Results for PY 2021

- 124,708\* youth participants served
- Employment, education, or training during the 2<sup>nd</sup> quarter after exit: 73.1%
- Employment, education, or training during the 4<sup>th</sup> quarter after exit: 70.9%
- Median earnings during the 2<sup>nd</sup> quarter after exit: \$4,235
- Credential Attainment Rate: 60.0%
- Measurable Skill Gains: 54.7%
- Effectiveness in serving employers (system-wide measure, not program specific)

\*Participant served numbers for PY 2021 were lower than previous years due to impact from COVID-19



# CSPIN PROGRAM OVERVIEW/SUMMARY



**5,010**

Individuals Assisted



**1,880**

Exited with Employment



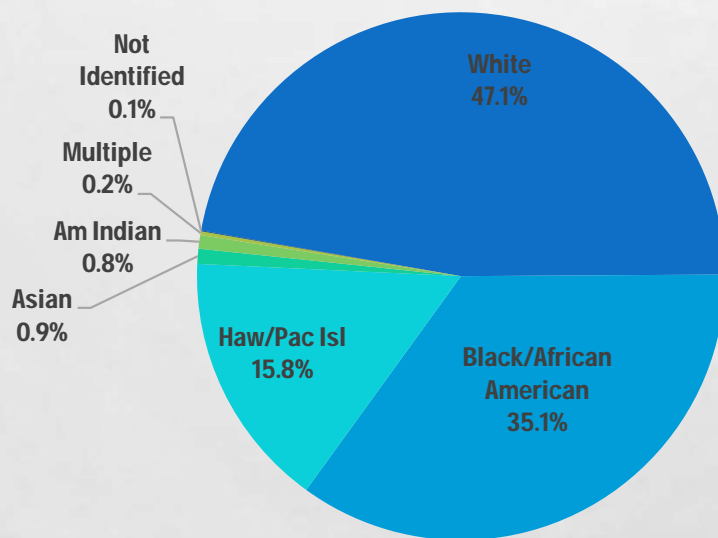
**\$15.74**

Average Wage

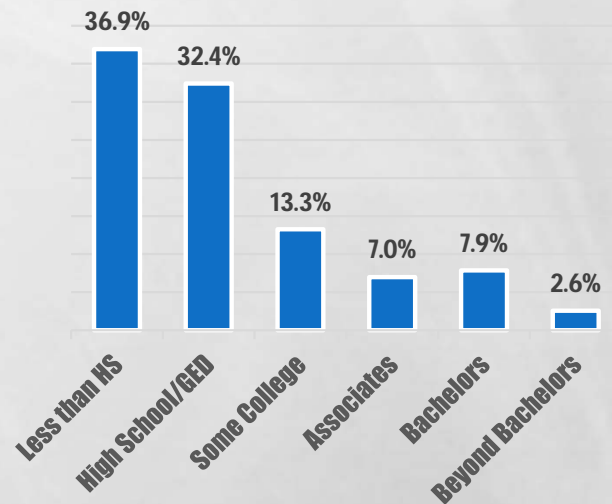
	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Exited with Employment	Individuals Assisted	Exited with Employment	Individuals Assisted	Exited with Employment
Wagner-Peyser	4,315	1,576	5,395	1,823	7,145	2,122
WIOA	650	87	613	196	1,444	741
Special Grants	73	4	76	15	284	14
Welfare Transition	474	96	634	146	858	258
SNAP	603	117	876	162	272	70

## Program Year 2022-2023

### Customers by Race/Ethnicity



### Customers By Education



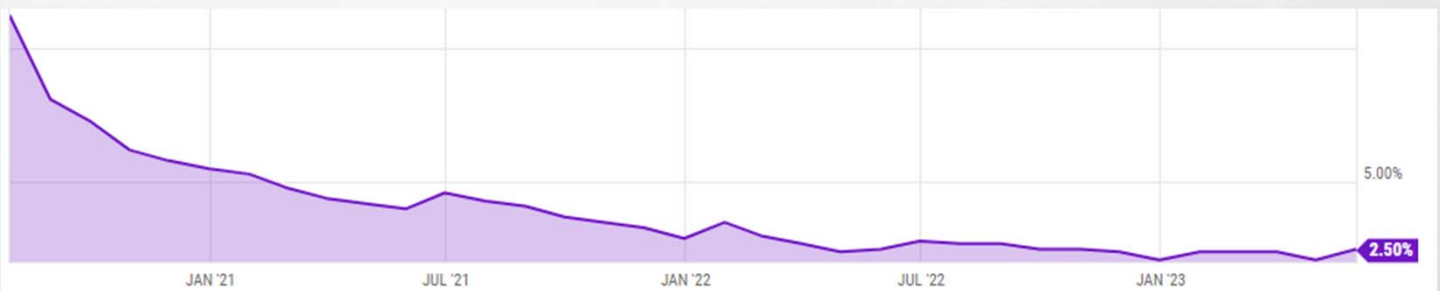
### Customers by Desired Occupation



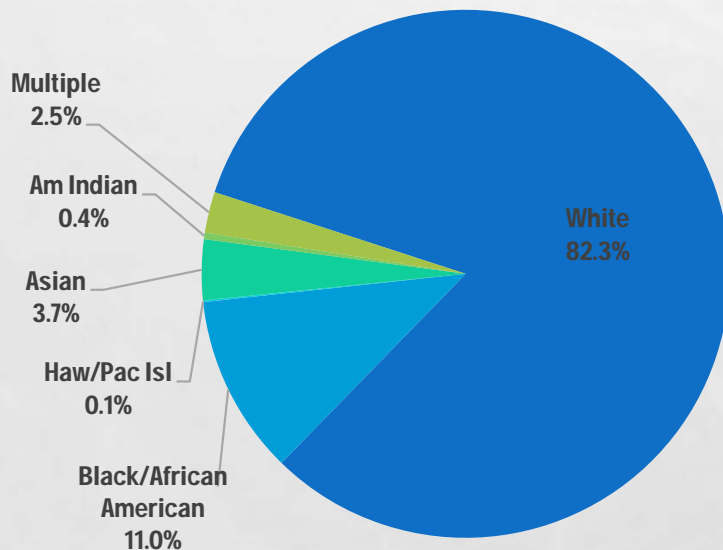
# PINELLAS COUNTY OVERVIEW/SUMMARY

**2.50%**  
Pinellas County  
Unemployment Rate

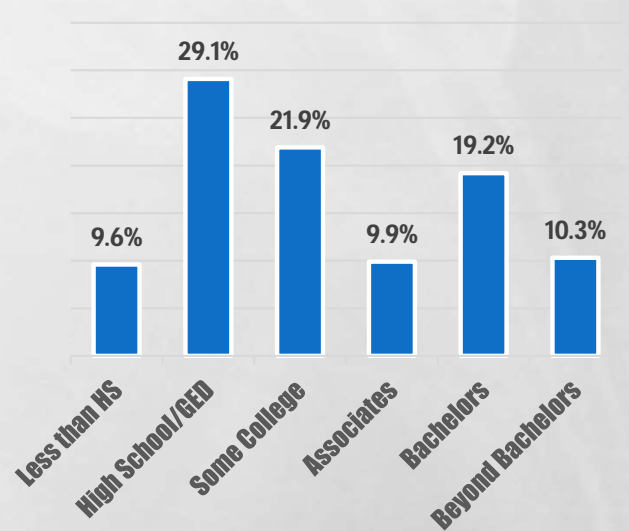
Pinellas County Unemployment Rate Jul 2020 – May 2023



## Residents by Race/Ethnicity



## Residents By Education



## Job Openings by Occupation





# WAGNER-PEYSER



**367**

Staff Assisted who  
Obtained Employment



**3,051**

Job Referrals provided  
to Participants



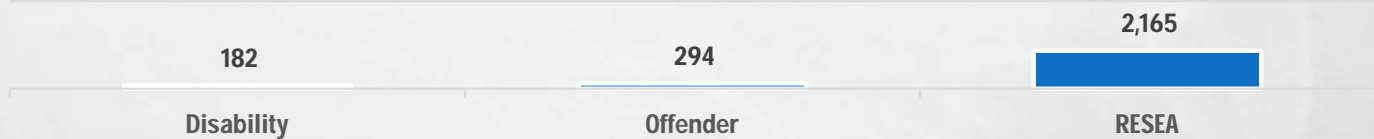
**4,315**

Participants provided Staff  
Assisted Services

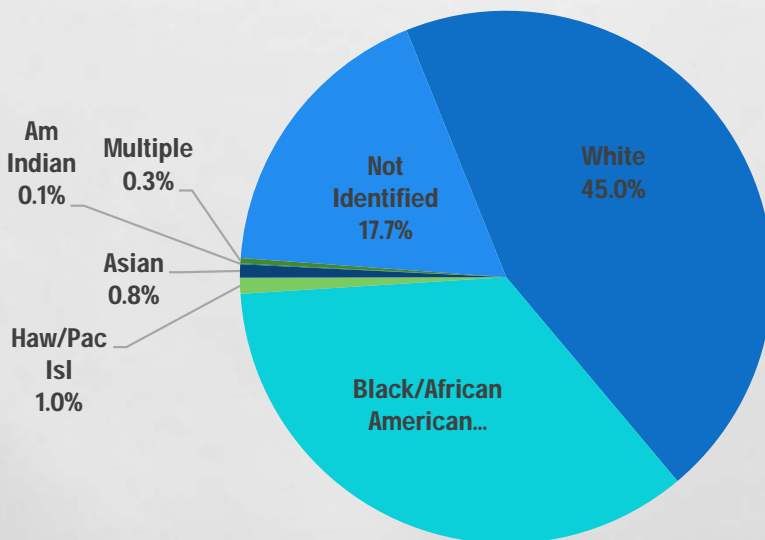
	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	# EF Codes Entered	Individuals Assisted	# EF Codes Entered	Individuals Assisted	# EF Codes Entered
Employment	367	377	527	550	382	399
Job Referrals	949	3,051	1,425	5,257	1,307	3,885
Service	4,092	21,996	5,270	28,052	7,226	33,275

## Program Year 2022-2023

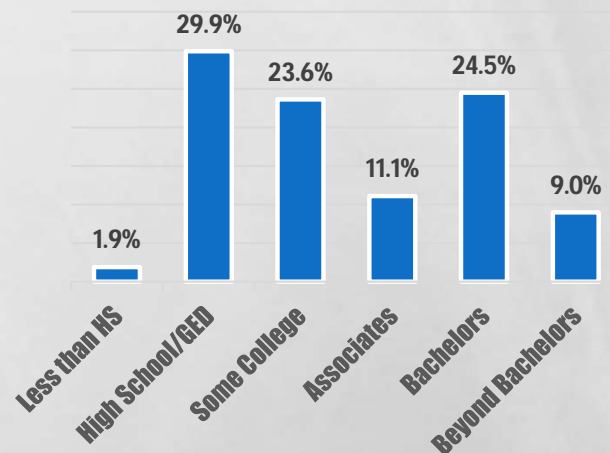
### Customer Barriers



### Customers by Race/Ethnicity



### Customers By Education



Measure	PY20/21	PY21/22	PY22/23 thru Q3	Current Goal
Employed 2 <sup>nd</sup> Qtr After Exit	59.5%	59.6%	65.6%	63.2%
Median Wage 2 <sup>nd</sup> Qtr After Exit	\$5,651	\$6,686	\$7,421	\$6,515
Employed 4th Qtr After Exit	61.2%	60.4%	66.4%	63.2%

# WIOA ADULT



**585**

Individuals Assisted



**56**

Exited with Employment



**\$22.35**

Average Wage

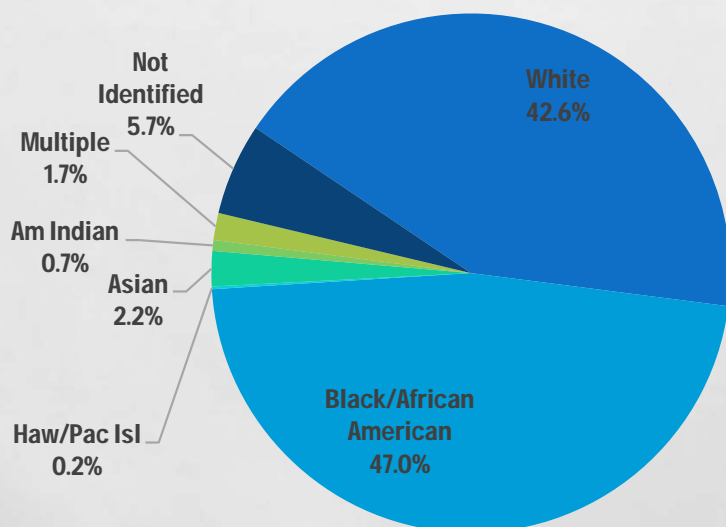
	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment
Adult	585	56	696	39	787	91

## Program Year 2022-2023

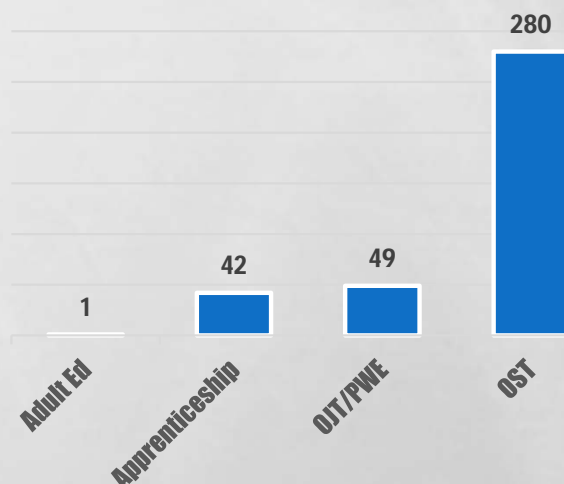
### WIOA Adult Barriers



### WIOA Adult by Race/Ethnicity



### WIOA Adult By Training Type



Measure	PY20/21	PY21/22	PY22/23 thru Q3	Current Goal
Employed 2 <sup>nd</sup> Qtr After Exit	94.5%	82.6%	80.1%	92.0%
Median Wage 2 <sup>nd</sup> Qtr After Exit	\$11,970	\$11,068	\$10,506	\$10,740
Employed 4th Qtr After Exit	87.5%	92.9%	82.8%	90.2%
Credential Attainment Rate	95.5%	86.9%	67.2%	87.0%
Measurable Skill Gains	76.6%	66.2%	56.3%	65.0%



# WIOA DISLOCATED WORKER



**213**

Individuals Assisted



**32**

Exited with Employment



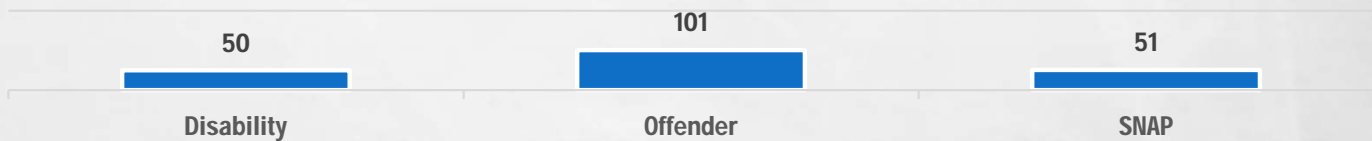
**\$28.83**

Average Wage

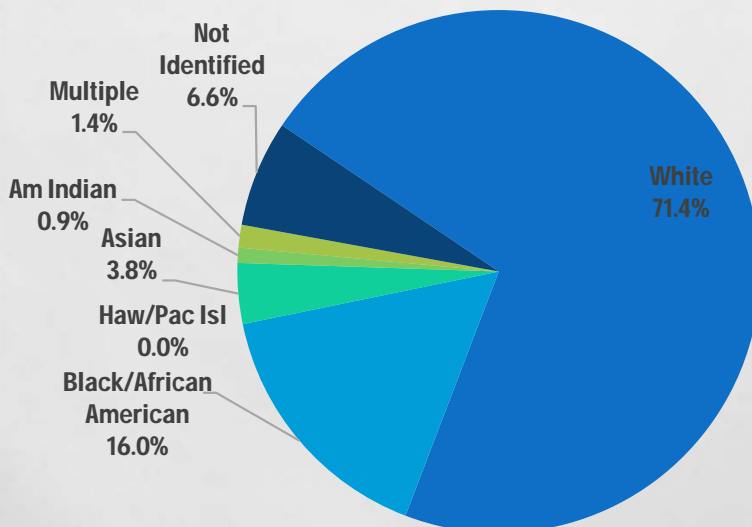
	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment
DW	213	32	515	63	647	256

## Program Year 2022-2023

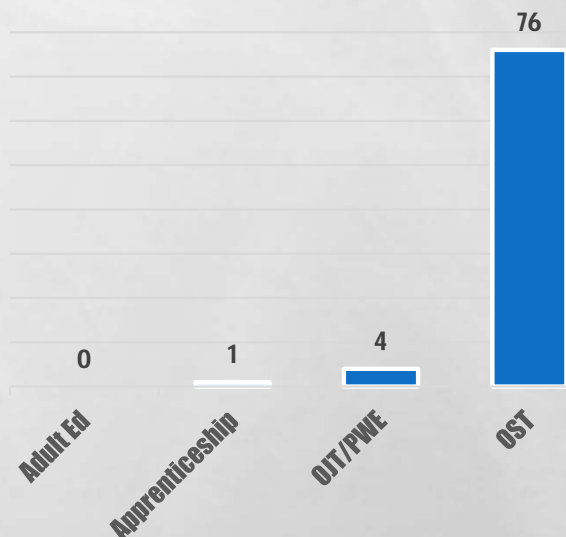
### WIOA DW Barriers



### WIOA DW by Race/Ethnicity



### WIOA DW By Training Type



Measure	PY20/21	PY21/22	PY22/23 thru Q3	Current Goal
Employed 2 <sup>nd</sup> Qtr After Exit	90.1%	80.3%	73.2%	88.0%
Median Wage 2 <sup>nd</sup> Qtr After Exit	\$10,846	\$12,112	\$11,667	\$9,369
Employed 4 <sup>th</sup> Qtr After Exit	72.9%	87.5%	79.3%	84.2%
Credential Attainment Rate	87.6%	93.3%	87.3%	86.5%
Measurable Skill Gains	88.7%	57.5%	39.8%	65.0%

# WIOA YOUTH



**274**

Individuals Assisted



**90.1%**

Out-of-School Youth



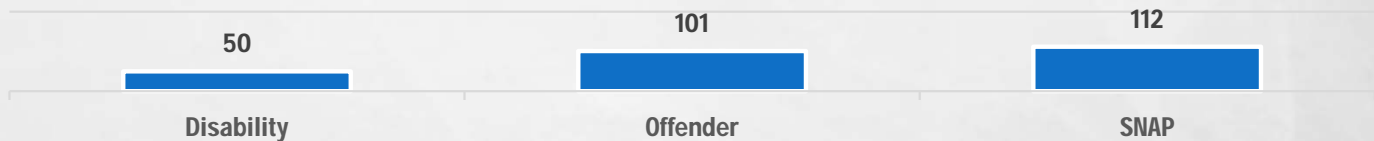
**\$19.49**

Average Wage

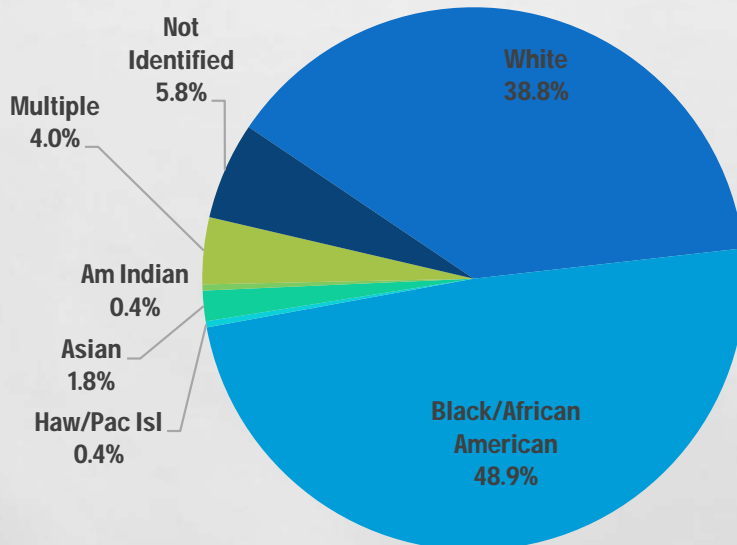
	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment	Individuals Assisted	Exited with employment
PEF	167	17	333	68	416	158
WIOA Youth	107	2	109	6	124	39

## Program Year 2022-2023

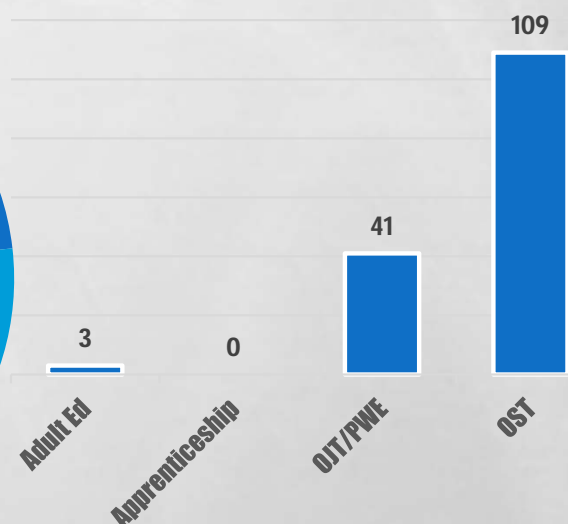
### WIOA Youth Barriers



### WIOA Youth by Race/Ethnicity



### WIOA Youth By Training Type



Measure	PY20/21	PY21/22	PY22/23 thru Q3	Current Goal
Employed 2 <sup>nd</sup> Qtr After Exit	89.8%	83.5%	82.2%	83.5%
Median Wage 2 <sup>nd</sup> Qtr After Exit	\$4,739	\$4,726	\$5,282	\$4,698
Employed 4th Qtr After Exit	86.0%	86.0%	82.0%	81.0%
Credential Attainment Rate	76.0%	82.9%	81.5%	84.1%
Measurable Skill Gains	80.3%	69.2%	52.6%	65.0%

# SNAP

(SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM)



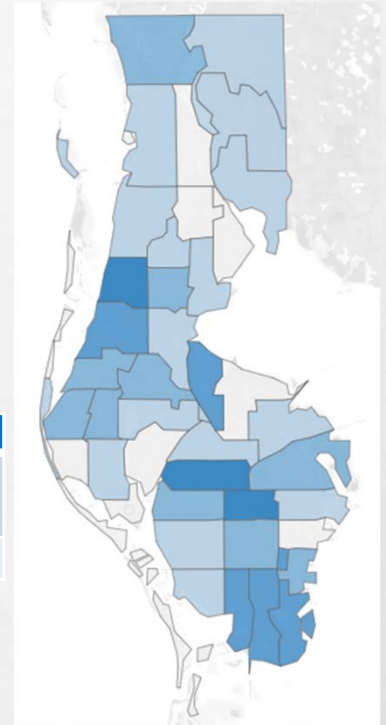
**603**

Individuals Assisted



**\$13.49**

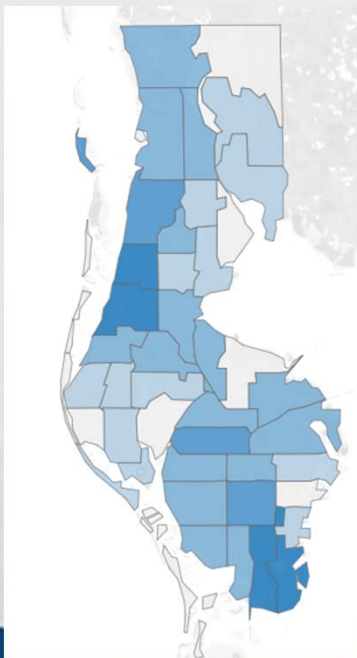
Average Wage



SNAP Recipient Density

	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Employed	Individuals Assisted	Employed	Individuals Assisted	Employed
SNAP	603	112	876	171	272	81

Poverty Density



# WELFARE TRANSITION



**474**

Individuals Assisted



**\$14.88**

Average Wage

	PY22/23		PY21/22		PY20/21	
	Individuals Assisted	Employed	Individuals Assisted	Employed	Individuals Assisted	Employed
WT	474	129	634	158	858	507

\* Darker shades indicate higher population.

Map data courtesy of Florida Chamber of Commerce <https://www.flchamber.com/floridagapmap/>

# VETERAN



**409**

Individuals Assisted



**92**

Employments



**264**

Outreach Activities



**17+**

Community  
Partners

CareerSource Pinellas offers innovative veteran services to help the those who have served this country thrive in meaningful careers. Veteran services include career exploration, skills training, referral services and more!

To help veterans succeed in their job search, CareerSource Pinellas partners with local employers to expand employment opportunities for military men, women and their spouses. Local Veteran services staff meet directly with community partners, businesses, VA medical centers, community-based organizations and reserve guard units to create new employment opportunities for veterans in need.

# DISABILITY NAVIGATOR



**671**

Individuals in  
System



**318**

Individuals  
Assisted by  
Staff



**74**

Working with  
Disability  
Navigator Staff

Social Security's Ticket to Work (TTW) program, assists individuals ages 18-64 who receive disability benefits, SSDI (Social Security Disability Insurance) and/or SSI (Supplemental Security Income).

It's a free and voluntary program that supports career development for those that want to work. The purpose of this program is to offer support that one would need to increase both their ability to work, increase their earnings and reduce their reliance on cash benefits. TTW offers resources for improving employability skills and increasing career opportunities to those who are interested in working toward full time employment and being self-sufficient.

# SPECIAL GRANTS

## GET THERE FASTER



**79**

**Participants  
Enrolled**

The Get There Faster Grant launched in October 2021. Low-Income Returning Adult Learners provides adults and youth seeking education and training the opportunity to earn industry-recognized cloud computing or other IT related credentials of value identified by the Florida Department of Education (FDOE). This grant has been extended through June 2024.

At-Risk Floridians (Added July 2023)- Provides adults and youth who are justice connected or in recovery from substance use seeking education and training the opportunity to earn industry-recognized credentials within the fields of Construction, Manufacturing, Healthcare, and Hospitality. The projected closing date is June 2024.





# **MARKETING & OUTREACH**

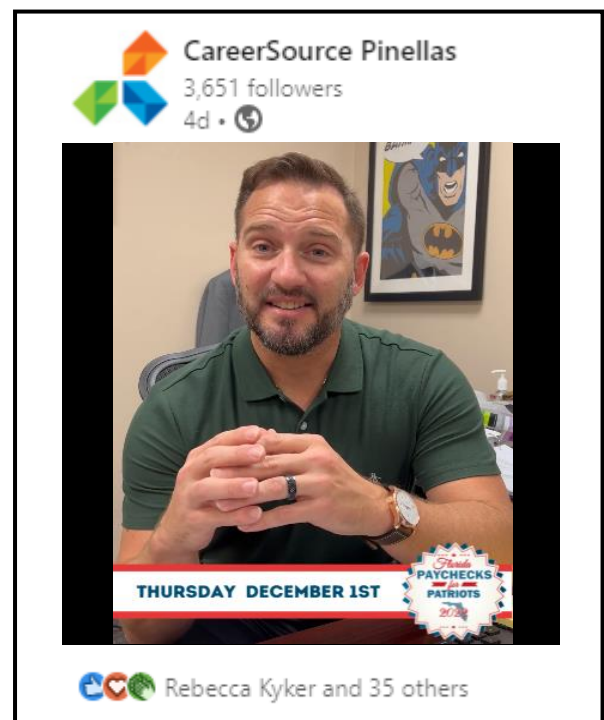
## **SUMMARY (PY 2022-2023)**

## Social Media

Our primary goal has been to highlight events and career services to increase awareness while expanding our target demographic. Below are examples of Popular social media posts produced during PY 22-23.



### GOVERNMENT AND MUNICIPALITIES JOB FAIR (30,728 IMPRESSIONS)



### PAYCHECKS FOR PATRIOTS JOB FAIR (19,217 IMPRESSIONS)



### LEALMAN COMMUNITY JOB FAIR (18,783 IMPRESSIONS)

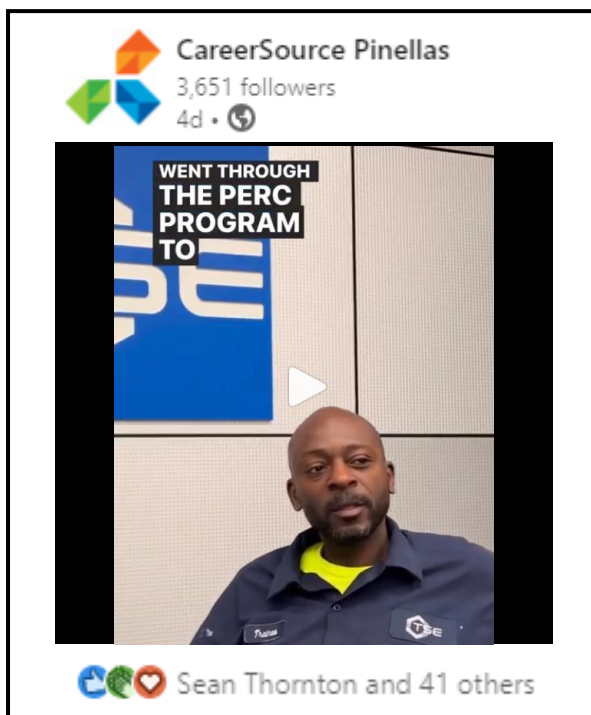
## Social Media (Cont.)



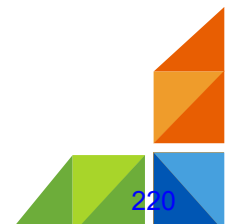
**HAVE YOU SEEN OUR BUS?**  
**PSTA BUS ADVERTISING**  
(2,335 IMPRESSIONS)



**SUMMER PAYS SUCCESS  
STORY**  
(16,012 IMPRESSIONS)



**TSE AND PERC  
SUCCESS STORY**  
(1,875 IMPRESSIONS)





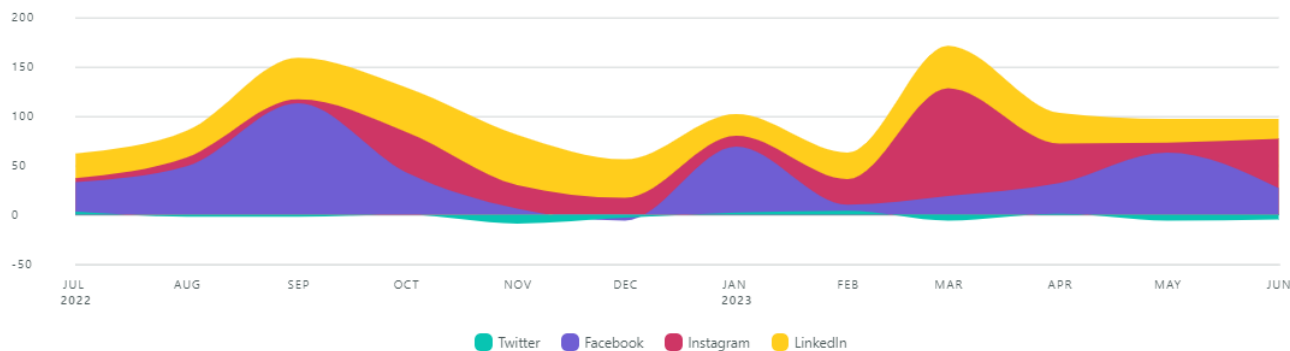
# Social Media Performance Summary

PERIOD (JULY 01 2022-JUNE 30 2023) VS (JULY 01 2021- JUNE 30 2022)

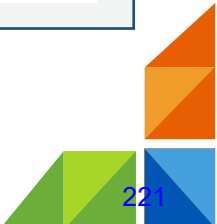
<div>Impressions</div> <div>378,043 ↗149.3%</div>	<div>Engagements</div> <div>32,191 ↗382.2%</div>	<div>Post Link Clicks</div> <div>11,577 ↗204.5%</div>
<div>Engagement Rate (per Impression)</div> <div>8.5% ↗93.4%</div>		

## Audience Growth

Net Audience Growth, by Month



Audience Metrics	Totals	% Change
Total Audience	9,558	↗13.6%
Total Net Audience Growth	1,169	↗209.3%
Twitter Net Follower Growth	-23	↘253.3%
Facebook Net Follower Growth	451	↗463.8%
Instagram Net Follower Growth	345	↗422.7%
LinkedIn Net Follower Growth	396	↗82.5%

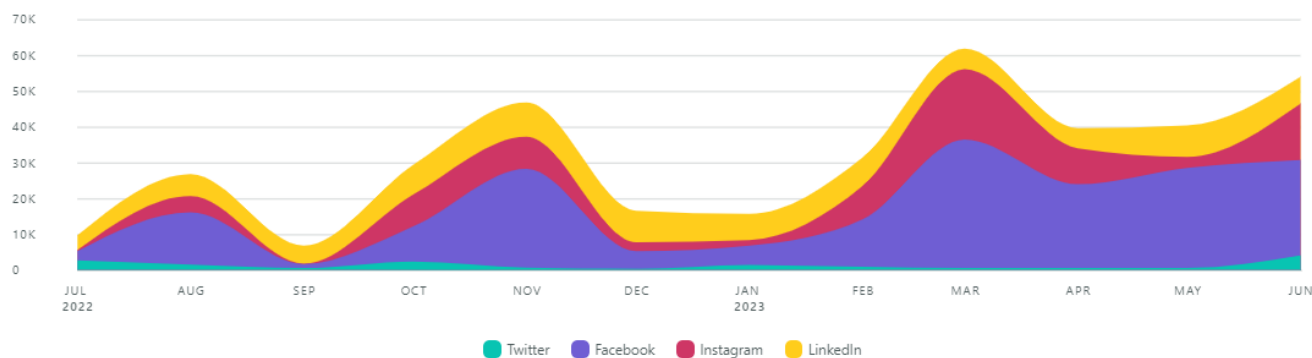


# Social Media Performance Summary

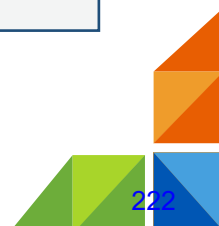
PERIOD (JULY 01 2022-JUNE 30 2023) VS (JULY 01 2021- JUNE 30 2022)

## Impressions

Impressions, by Month



Total Impressions	378,043	↗ 149.3%
Twitter Impressions	15,452	↘ 35.6%
Facebook Impressions	193,130	↗ 118.3%
Instagram Impressions	84,716	↗ 634%
LinkedIn Impressions	84,745	↗ 206.6%

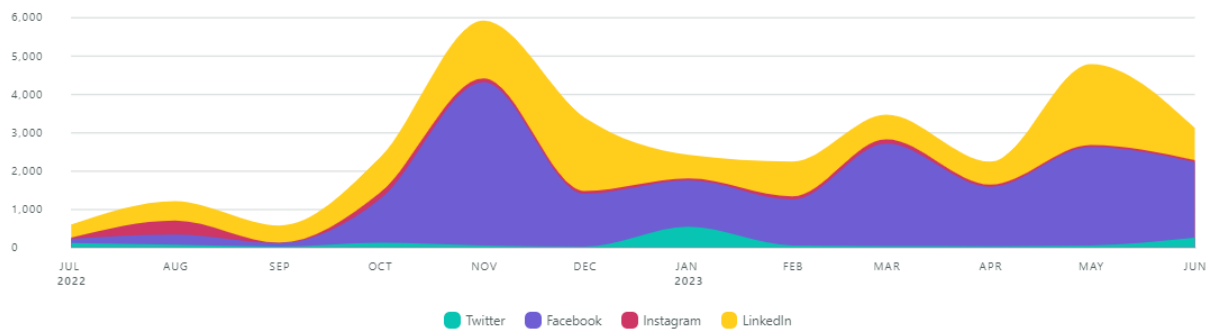


# Social Media Performance Summary

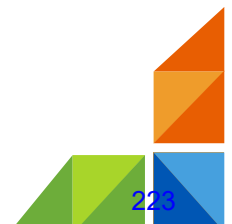
PERIOD (JULY 01 2022-JUNE 30 2023) VS (JULY 01 2021- JUNE 30 2022)

## Engagement

Engagements, by Month



Total Engagements	32,191	↗382.2%
Twitter Engagements	1,282	↗118%
Facebook Engagements	18,418	↗370.6%
Instagram Engagements	1,139	↗691%
LinkedIn Engagements	11,352	↗459.2%

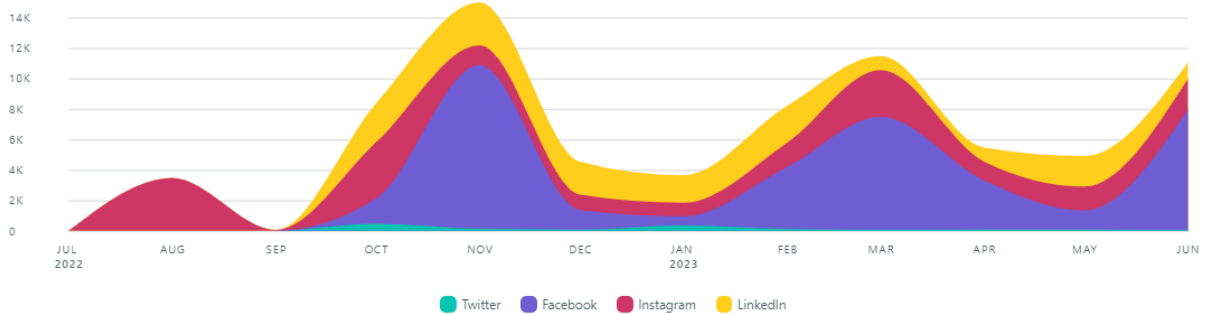


# Social Media Performance Summary

PERIOD (JULY 01 2022-JUNE 30 2023) VS (JULY 01 2021- JUNE 30 2022)

## Video Views

Video Views, by Month



### Video Views Metrics

### Totals

### % Change

#### Video Views

76,017 ↗28,477.8%

#### Twitter Video Views

1,297 ↗6,385%

#### Facebook Video Views

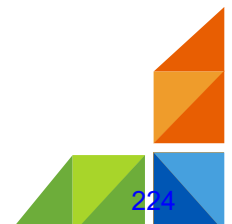
38,160 ↗61,448.4%

#### Instagram Post Video Views

19,893 ↗284,085.7%

#### LinkedIn Video Views

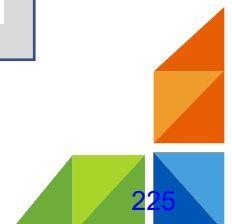
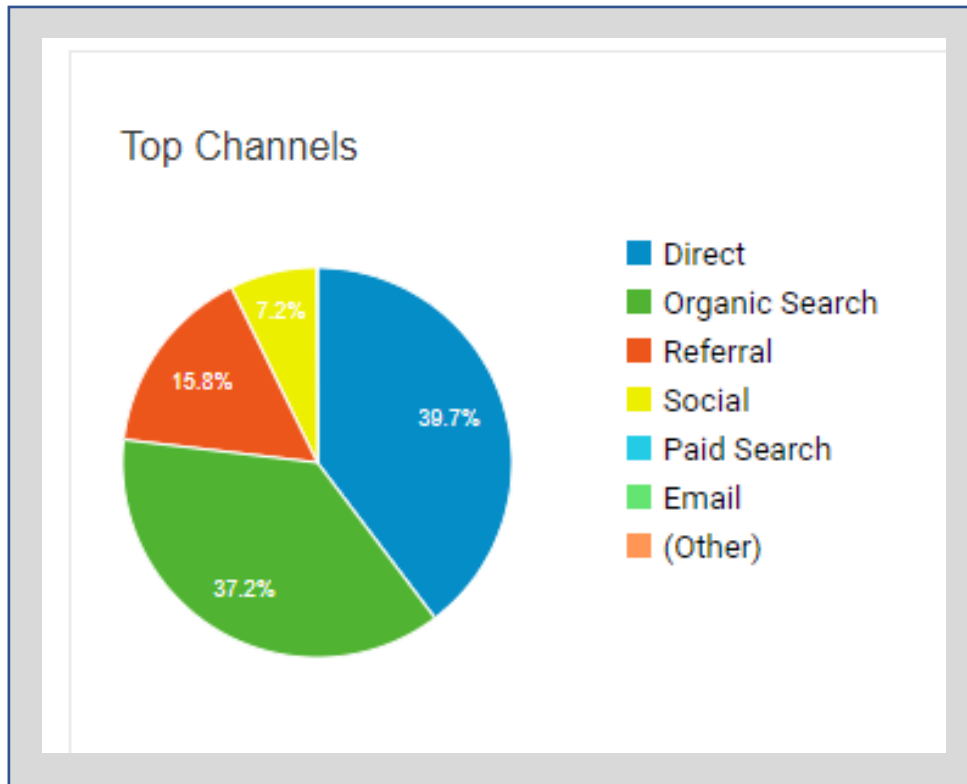
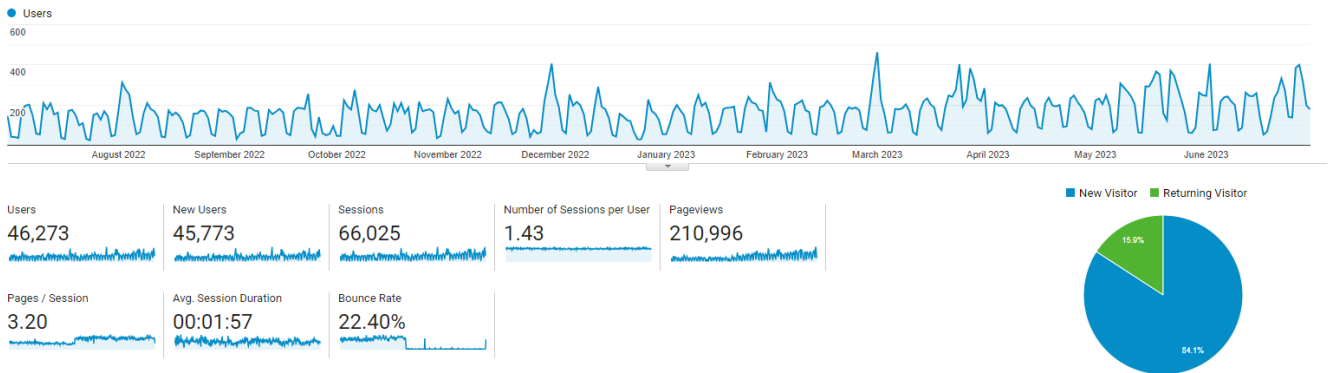
16,667 ↗9,316.4%



# Website Performance Summary

PERIOD (JULY 01 2022-JUNE 30 2023) VS (JULY 01 2021- JUNE 30 2022)

## Overview





## INFORMATION ITEM 10

### CareerSource Pinellas

#### Work-based Learning and On-the-Job Training Spending For the period July 1, 2022 - June 30, 2023

OJT Provider	Work-based Learning Spending	Approved Spending (if required)	Remaining	# of Participants	Avg./ Per Part	Prior Year Spending
Badaro Group	\$ 9,281			2	\$ 4,641	-
Bert Smith Oldsmobile, Inc.	\$ 3,065			1	\$ 3,065	-
Clean Soil Technology	\$ 2,285			1	\$ 2,285	-
Catalyst QLM LLC	\$ -			-		224,018
Manpower	\$ 906,708			372	\$ 2,437	166,312
McManus & McManus	\$ 3,080			1	\$ 3,080	-
Mechanical A/C Designs LLC	\$ -					11,845
Net Synergy Virtual Solutions LLC	\$ 35,344			9	\$ 3,927	-
Research Development Manufacturing, LLC	\$ 1,603			1	\$ 1,603	
Universal Life and Health Insurance	\$ 1,401			1	\$ 1,401	-
Veterans Metal LLC dba DHS Enterprises	\$ -					1,853
<b>Total</b>	<b>\$ 962,766</b>			<b>388</b>	<b>\$2,481</b>	<b>\$ 404,029</b>

**Variance \$     \$ 558,737**

**Variance %         138%**



**INFORMATION ITEM 11**  
**CareerSource Pinellas**  
**Training Provider Spending**  
**For the period July 1, 2022 - June 30, 2023**

Training Provider	Customer Training	Approved Spending (if required)	Remaining	# of Participants	Avg/ Per Part
Academy for Dental Assistants, (Pinellas)	28,955			10	2,896
Access Computer Training, (Hillsborough)	57,500			9	6,389
American Manufacturing Skills Initiative (AmSkills)	-				
BizTech Learning Centers, Inc., ( Pinellas)	-				
Center for Technology Training	17,490			4	4,373
Central Florida Heat and Frost Insulators J.A.C. (RA)					
Champion Truck Driving School	247,585			49	5,053
Computer Coach IT Training Solutions	42,500			7	6,071
Concorde Career Institute, (Hillsborough)	15,000			2	7,500
Connecticut School of Broadcasting, (Hillsborough)					
Fleet Force Truck Driving School	14,268			2	7,134
Florida Technical College					
Galen College of Nursing, (Pinellas)	292,215			60	4,870
Gold Coast Professional Schools					
Hillsborough Community College	-			-	
IEC- Independent Electrical Contractors, FAAC					
International Union of Operating Engineers (RA)					
Ironworkers (RA)					
JATC - Tampa Area Electrical JATC, (Hillsborough), FAAC (RA)	28,020			27	1,038
Jersey College, ( Hillsborough)	35,937			10	3,594
Keiser University	12,500			2	6,250
Masonry (RA)					
National Aviation Academy	141,171			24	5,882
Net Synergy Virtual Solutions LLC	44,612			7	6,373
New Horizon Computer Learning Center, (Hillsborough)	348,550			55	6,337
Pinellas Ex-Offender Re-Entry Coalition *		50,000	50,000		
Pinellas Technical Education Centers *	52,586	300,000	247,414	36	1,461
Plumbers and Pipefitters and HVAC, local union 123 (RA) *					
R.V. Training Center					
Rasmussen College	18,774			5	3,755
Refrigeration & Air Conditioning Contractors (RACCA) (RA)					
Roadmaster Drivers School, Inc., (Hillsborough)	7,495			1	7,495
Schiller International University, (Pinellas)					
Southern Technical Institute, Pinellas Park, (Pinellas)	9,578			9	1,064
St. Petersburg College *	150,950	1,200,000	1,049,050	57	2,648
Superior Aviation Gate	4,820			1	4,820
Tampa Bay Aviation	5,000			1	5,000
Tampa Truck Driving School, Inc.	68,000			12	5,667
Ultimate Medical Academy (Pinellas) *	150,286	250,000	99,715	24	6,262
Ultimate Medical Academy (Online)					
University of South Florida / Innovative Education, SACS	44,630			10	4,463
Veritas Nursing Academy					
Webster University					
<b>Total</b>	<b>\$ 1,809,463</b>			<b>414</b>	<b>\$ 4,371</b>
<b>Prior Year for Same Period</b>	<b>\$ 1,210,790</b>			<b>340</b>	<b>\$ 3,561</b>
<b>Variance</b>	<b>\$ 598,673</b>			<b>74</b>	<b>\$ 810</b>
	<b>49%</b>			<b>22%</b>	<b>23%</b>

**RELATED PARTY CONTRACTS (with multiple components)**

	Spending	Amount	Remaining	Component
<b>Pinellas Technical Education Centers *</b>				
	52,586	300,000	247,414	Training (ITA)
	124,031	130,000	5,969	Leases
	<b>176,617</b>	<b>430,000</b>	<b>253,383</b>	
<b>St. Petersburg College *</b>				
	150,950	1,200,000	1,049,050	Training (ITA)
	118,037	160,000	160,000	Leases
	69,500	125,000	55,500	Contracts
	<b>338,487</b>	<b>1,485,000</b>	<b>1,264,550</b>	
<b>Ultimate Medical Academy (Pinellas) *</b>				
	150,286	250,000	99,715	Training (ITA)
	-	100,000	100,000	OJT
	<b>150,286</b>	<b>350,000</b>	<b>199,715</b>	

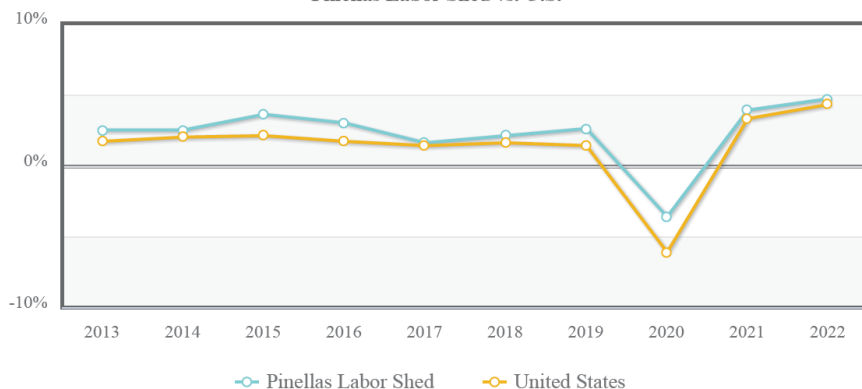
\* Contracts required two-third board approval.

Note: Amounts above represent disbursements made to training providers during time period.

# Pinellas County Economic Dashboard

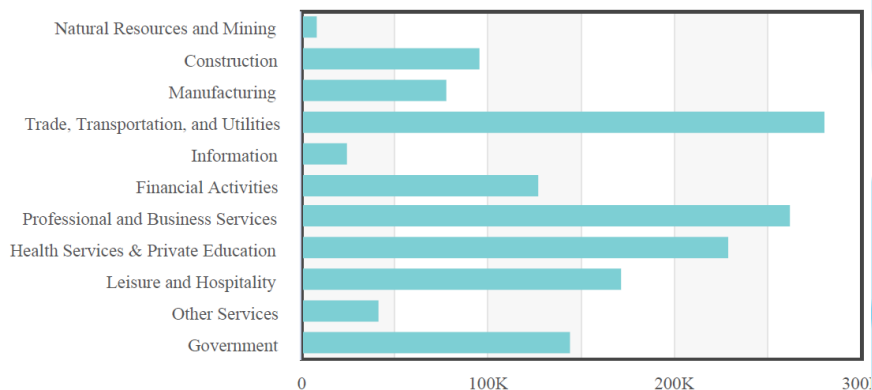
Annual Employment Growth, 2012-2022

Pinellas Labor Shed vs. U.S.



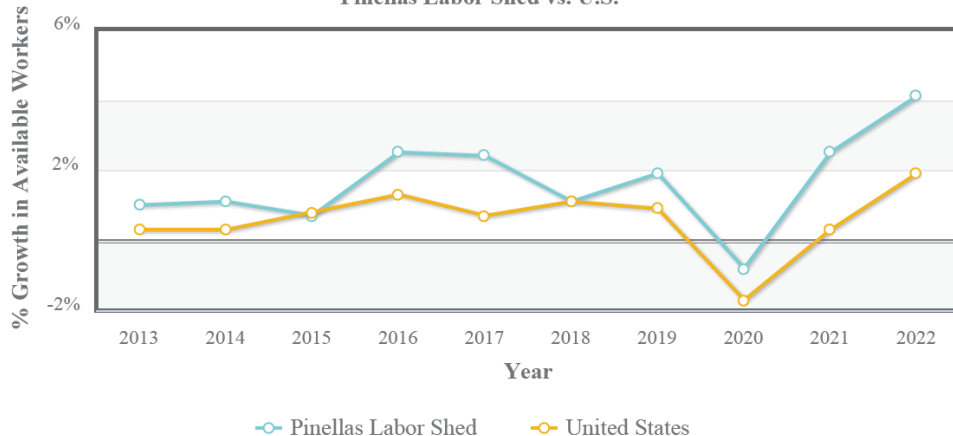
Employment By Industry

Pinellas Labor Shed



Growth in Available Workforce, 2012-2022

Pinellas Labor Shed vs. U.S.





# Goal 1 - Develop Robust Partnerships with Employers

- **Objective 1:** Utilize and partner with existing business group that convene employers regularly to understand immediate and future needs.
- **Objective 2:** Develop and execute a marketing strategy to build awareness with businesses about engagement and services available.
- **Objective 3:** Increase services to incumbent workers and underemployed workers.
- **Objective 4:** Develop methods that help businesses navigate the workforce system's services and that connect them with qualified applicants.

## 11 Business Group Partners

- | [BAMA \(Bay Area Manufacturing Association\)](#)
- | [Central Pinellas Chamber](#)
- | [Greater Seminole Chamber of Commerce](#)
- | [Pinellas Economic Development](#)
- | [Recruiter Networking Group](#)
- | [St. Petersburg Area Econ. Development Corp](#)
- | [St. Petersburg Chamber](#)
- | [Tampa Bay Beaches Chamber](#)
- | [Tampa Bay Tech](#)
- | [Upper Tampa Bay Chamber](#)
- | [Volunteers of Active Disaster \(VOAD\)](#)

1462

Employers Served

368

Newly Registered Employers

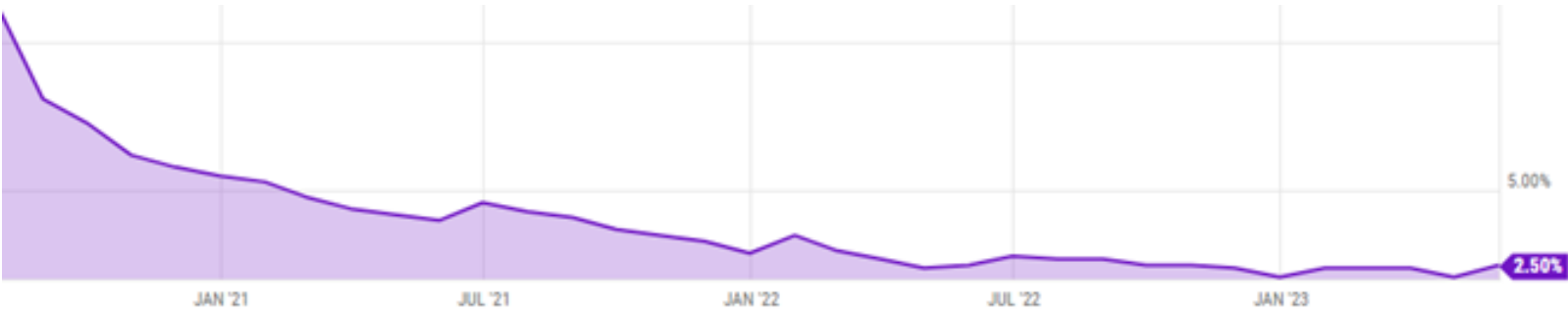
5726

Services Provided by Staff

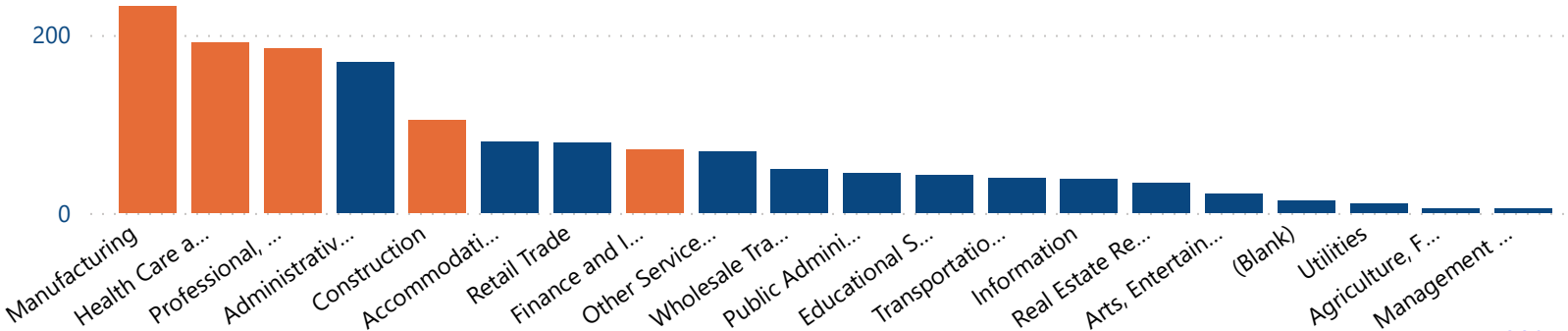
15186

Job Orders Posted

The unemployment rate in the CareerSource Pinellas region (Pinellas County) was 2.7 percent in June 2023. This rate was 0.1 percentage point lower than the region's year ago rate of 2.8 percent. The region's June 2023 unemployment rate was 0.3 percentage point lower than the state rate of 3.0 percent. The labor force was 535,657, up 22,087 (+4.3 percent) over the year. There were 14,537 unemployed residents in the region.



### Employer Industries Represented



## Goal 2 - Strengthen Partnerships with Organizations that Provide Educational Opportunities

- **Objective 1:** Compile all Labor Market Information (LMI) data and information to work together to create LMI Briefs that can be used by jobseekers, employers, and other workforce organizations in easy to consume formats.
- **Objective 2:** Convene employers to identify skill needs and align education providers' offerings to current and future skill needs.
- **Objective 3:** Provide easy to use 'career maps' for jobseekers to use to both knew where to go for education/training to obtain necessary credentials and next steps on a career path.
- **Objective 4:** Ensure that there is a Talent Pipeline that connects business service staff between CareerSource and educational institutions.

**42** Approved Training Providers and  
**129** Regional Targeted Occupations



The industries gaining jobs over the year were Professional and Business Services (+18,600 jobs); Education and Health Services (+18,600 jobs); Trade, Transportation, and Utilities (+9,800 jobs); Leisure and Hospitality (+5,500 jobs); Mining, Logging, and Construction (+4,300 jobs); Other Services (+3,100 jobs); manufacturing (+2,500 jobs); and Government (+2,000 jobs).



The Tampa-St. Petersburg-Clearwater MSA had the highest annual job growth compared to all the metro areas in the state in the Professional and Business Services (+18,600 jobs); Education and Health Services (+18,600 jobs); and Mining, Logging, and Construction (+4,300 jobs) industries.

## Goal 3 - Expand Outreach to Jobseekers

- **Objective 1:** Target outreach efforts based on areas of opportunity.
- **Objective 2:** Expand the virtual delivery of service system currently in place.
- **Objective 3:** Conduct analysis of existing asset mapping to identify local community-based organizations and resource assets that might assist with outreach and service delivery.
- **Objective 4:** Conduct a gap analysis through engagement with priority customers and key stakeholders to assess what services may be missing and/or what changes are needed in how services are delivered to ensure participation.
- **Objective 5:** Support individuals to gain employment through a system of wraparound services that is responsive to their diverse experience and needs.
- **Objective 6:** Develop a Regional Targeted Occupations List.

**254** Employers participated in  
**11** career fairs with **1016** job  
seekers attending.

Job Seekers during PY

8540

Placements Recorded

1880

Services Provided

25317

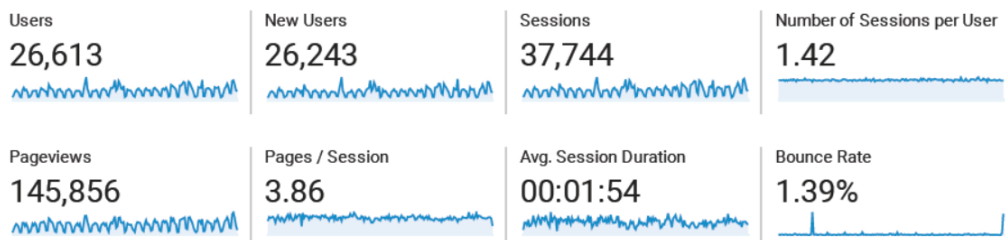
### Focus on service

*Business Services teammates continue to reenergize relationships across all sectors as COVID impacts continue to abate, adding new partnerships and memberships to Chambers of Commerce, community groups and sector specific support organizations.*

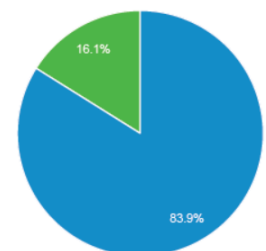
### Networking Groups

*\*\*Networking events resumed in December 2022 and average about 10 attendees per session.*

### Website Visits Jan 1 - Jun 30, 2023



■ New Visitor ■ Returning Visitor



# Goal 4 - Build Organizational Capacity; Promote Change and Transformation of CareerSource Pinellas

- **Objective 1:** Present a positive message of the organization to include all that is currently being done and what will be done based on the strategic plan.
- **Objective 2:** Update talking points for use by board members and staff as part of the awareness campaign.
- **Objective 3:** Continue to improve and enhance the technology infrastructure both internally for staff to be more efficient and for communication among the system's partners and to increase user friendly access for customers.
- **Objective 4:** Ensure compliance and work with/train on the new ways of doing business that are in compliance while reducing the burden on customers through streamlined compliant processes.
- **Objective 5:** Develop methods to regularly listen to customers to test new processes before implementing them permanently.

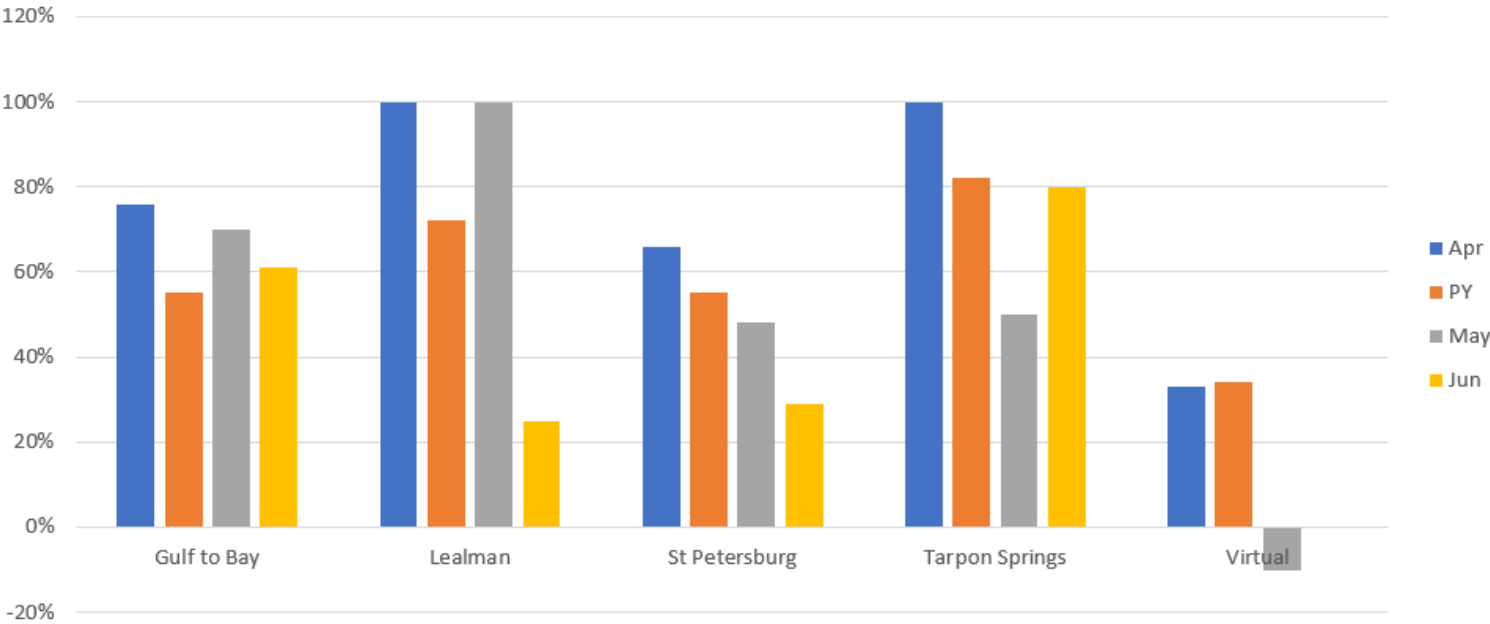
### Strategy

By continuing strategic leadership expansion, CareerSource Pinellas has begun to grow the organization, to include multiple director level roles, expand during pre-COVID operations.

### Awareness

Our internal marketing team and Tucker Hall, Public Relations Firm, are actively working to assist with strategic communications and to amplify our voice in the Tampa Bay area.

Net Promotor



Services Accessed by Month

Service	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Appointment with Staff	25.00%	17.39%	19.61%	22.73%	12.50%	33.82%	30.00%	42.59%	30.88%	37.18%	36.67%	38.60%	28.91%
Live or Recorded Online Workshops	25.00%	21.74%	35.29%	25.76%	34.38%	33.82%	28.57%	33.33%	44.12%	48.72%	40.00%	42.11%	34.40%
Recruitment Event	0.00%	4.35%	5.88%	16.67%	7.81%	1.47%	10.00%	11.11%	7.35%	7.69%	6.67%	5.26%	7.02%
Reemployment Assistance	58.33%	50.00%	56.86%	66.67%	60.94%	61.76%	75.71%	64.81%	58.82%	66.67%	55.00%	56.14%	60.98%
Use of Computer Lab	8.33%	23.91%	11.76%	12.12%	15.63%	8.82%	17.14%	16.67%	19.12%	10.26%	10.00%	10.53%	13.69%
Workforce Program Services (Job Search/WIOA/WTP/SNAP)	33.33%	43.48%	25.49%	24.24%	18.75%	38.24%	44.29%	33.33%	39.71%	23.08%	33.33%	33.33%	32.55%
Other	2.78%	17.39%	9.80%	6.06%	7.81%	5.88%	10.00%	0.00%	8.82%	7.69%	6.67%	8.77%	7.64%



## INFORMATION ITEM 14

### Financial Summary

### For the Year Ended June 30, 2023

#### Actual Year-To-Date Results Compared to Prior Year

- **Surplus (all unrestricted activity) for year ended of \$23,000 compared to a deficit of \$1,934,000 last year.**
  - Prior year included closure of U.S. Department of Labor compliance review and payback of disallowed costs of \$1,863,000.

#### REVENUES

- Increase in Federal Grant revenue driven by improved spending in Federal grants - \$1,720,000.
- Increases in Ticket to Work revenue (\$26,000) and interest income (\$29,000).

#### EXPENSES

- **Salaries and related personnel expenses** are higher by \$950,000 (28%) over last year as the organization identified and filled critical positions.
  - Headcount is back to pre-pandemic levels.
- Overall **Program Spending** is up by \$870,000 over the previous year, led by increases in customer training (up \$520,000) and OJT/PWE spending (up a more than \$600,000) as these have been a renewed focus of the organization this year.
  - Lower Dislocated Work Experience (\$216,000) spending as this resulted from COVID dislocated worker grant that closed in prior year.
- **Professional fees** are down \$224,000:
  - Reduction in **Legal Fees** (\$85,000) as previous year there were two whistleblower investigations and issues with previous CEO.
  - Lower **Contract Labor** costs this year (\$80,000) driven by lower expenses with Securance (\$51,000) as there were fewer strategic IT initiatives this year, and lower expenses with Manpower, Catalyst QLM and hrEdge consulting (\$30,000)
  - Lower **Contract IT Services** (\$90,000) due to SharePoint and One-Drive data migration last fiscal year.
  - Higher spending for **Professional Services** of \$58,000 for our compensation review earlier this year and increased marketing/outreach expenses associated with Tucker Hall's involvement with REACH Act initiatives.



## INFORMATION ITEM 14 (cont.)

### Financial Summary For the Year Ended June 30, 2023

- **Computer Software and Maintenance** expenses are higher by \$81,000 primarily due to purchase of the career center VOS greeter system and the purchase of Metrix software for customer skills assessment.

#### Actual YTD Results compared to Year-to-Date Budget Modification #2

- **Surplus (all unrestricted activity) for year ended of \$23,000 compared to budgeted surplus of \$84,000.**
  - Increased legal expenses associated with insurance defense for disallowed costs - **\$26,000.**
  - Other expense of **\$33,000** – write-off of expired testing vouchers and airline credits.
  - Higher expenses above resulted in **\$14,000** of additional administrative allocations to unrestricted.
- **Federal Grant Revenue** over budget by \$115,000 driven by higher spending explained below.
- **Personnel Expenses** over budget (\$238,000) as the organization filled critical positions necessary to provide required services.
- **Work-Based Learning** \$352,000 over budget as focus shifted to Work-Based learning. for OJTs and PWEs the last 6 months of the year.
  - Positive results with re-entry population working with PERC, youth (Job Corps) and Adult population.
  - Required youth PWE was 28.4% for the year; far exceeded 20% requirement.
- **Service Provider Contract** spending under budget by \$97,000 as Pinellas Education Foundation had staffing problems and enrollment problems.
  - Agreed to a no-cost extension through 12/31/2023.
- **Computer Software** unfavorable to budget (\$46,000) due to payment of one-time VOS Greeter (career center KIOSK system) implementation fee.

# CareerSource Pinellas

## Statement of Revenues and Expenditures - Unposted Transactions Included In Report From 7/1/2022 Through 6/30/2023 (In Whole Numbers)

		Actual 2022-2023	Actual 2021-2022	Variance
Revenue				
Operating Revenue				
Grant Revenue				
Grant Revenue - Federal	3000	9,221,292	7,501,208	1,720,084
Total Grant Revenue		9,221,292	7,501,208	1,720,084
Contributions				
Corporate Revenue	3100	3,530	3,525	5
Sponsorship Revenue	3101	0	1,000	(1,000)
Donations	3102	0	1,000	(1,000)
Total Contributions		3,530	5,525	(1,995)
Program Revenue				
Ticket to Work Revenue	3103	108,820	82,552	26,268
Total Program Revenue		108,820	82,552	26,268
Investment Income				
Interest/Dividends	3200	36,550	7,772	28,778
Total Investment Income		36,550	7,772	28,778
Other Income				
Other Revenues	3300	431	263	169
Total Other Income		431	263	169
Total Operating Revenue		9,370,624	7,597,320	1,773,304
Total Revenue		9,370,624	7,597,320	1,773,304
Expenditures				
Personnel Expenses				
Salary Expense	5000	3,264,295	2,558,365	(705,930)
Salary Expense - Benefit Stipend	5005	671,462	498,589	(172,873)
Payroll Taxes	5050	285,940	239,296	(46,644)
Fringe Benefits (ER Paid)	5060	34,805	27,822	(6,983)
Retirement	5090	151,677	131,556	(20,121)
Total Personnel Expenses		4,408,180	3,455,628	(952,551)
Program Expenses				
Operating Supplies	5303	118	0	(118)
Food and Beverages	5310	2,734	1,999	(735)
Communications	5500	97,695	91,746	(5,949)
Outreach/Marketing	5520	35,416	37,078	1,662
Service Provider Contract	8000	327,636	415,005	87,370
One-Stop Operator	8100	45,885	37,300	(8,585)
Internal Monitoring	8200	67,928	47,270	(20,658)
OJT	8300	798,951	265,112	(533,840)
Paid Work Experience	8320	105,254	21,061	(84,193)
DWG Work Experience	8325	0	215,680	215,680
Workforce Services	8335	64,900	57,200	(7,700)
Youth Stipends	8340	12,581	8,926	(3,655)
Other Customer Support Services	8341	23,803	31,178	7,375
Customer Training	8342	1,677,966	1,157,588	(520,378)
Customer Supportive Services	8343	1,301	59	(1,242)
Licensures	8344	295	0	(295)
Training Related Material	8345	55,134	51,828	(3,307)
Fees/exams/certifications	8346	18,800	28,355	9,554
Total Program Expenses		3,336,397	2,467,384	(869,013)
Professional Fees				
Accounting/Audit Fees	5100	22,407	45,943	23,536
Legal Fees	5101	61,775	147,262	85,487



**CareerSource Pinellas**

Statement of Revenues and Expenditures - Unposted Transactions Included In Report  
From 7/1/2022 Through 6/30/2023  
(In Whole Numbers)

		Actual 2022-2023	Actual 2021-2022	Variance
Professional Service	5104	136,719	79,107	(57,612)
Legal (Lobbying)	5105	25,792	35,245	9,454
Contract Labor	5170	146,480	227,318	80,838
Contract IT Services	5171	242,896	331,758	88,862
Cybersecurity - IT	5172	<u>47,750</u>	<u>40,788</u>	<u>(6,962)</u>
Total Professional Fees		683,819	907,422	223,603
Supplies				
Office Supplies	5302	23,893	15,463	(8,430)
Postage/Shipping	5307	3,597	2,682	(915)
Document Shredding	5308	<u>1,938</u>	<u>1,141</u>	<u>(797)</u>
Total Supplies		29,428	19,286	(10,142)
Insurance				
Insurance - Commercial Property	5400	6,727	7,450	723
Insurance - General Liability	5401	77,841	88,265	10,425
Insurance - Workers Comp	5403	15,758	33,384	17,626
Insurance - Auto	5404	<u>8,530</u>	<u>7,607</u>	<u>(923)</u>
Total Insurance		108,856	136,707	27,851
Occupancy				
Office Rent/Lease	5200	271,620	254,856	(16,764)
Other Leases	5201	0	2,840	2,840
Utilities	5202	33,638	32,139	(1,499)
Repairs & Maintenance	5203	8,929	18,715	9,786
Security	5204	395	22,215	21,820
Janitorial Expense	5205	38,799	43,867	5,068
Pest Control	5206	<u>2,664</u>	<u>2,409</u>	<u>(255)</u>
Total Occupancy		356,045	377,041	20,996
Office Equipment				
Equipment Rent/Lease	5300	27,288	36,829	9,541
Copy Machine Usage/Maintenance	5301	10,286	9,629	(657)
Comp	5304	185,257	103,814	(81,444)
Software/License/Maintenance				
Equipment < \$5,000	5305	<u>25,615</u>	<u>7,189</u>	<u>(18,427)</u>
Total Office Equipment		248,446	157,460	(90,986)
Travel and Meetings				
Travel - Mileage	5540	14,573	7,049	(7,524)
Travel - Out of Town	5541	35,968	13,235	(22,733)
Meetings/Conferences	5560	<u>13,765</u>	<u>7,680</u>	<u>(6,085)</u>
Total Travel and Meetings		64,306	27,964	(36,343)
Licenses, Dues and Other Fees				
Staff Training/Education	5052	17,801	48,446	30,645
Other Employee expenses	5055	0	(976)	(976)
Recruitment	5095	4,940	8,460	3,520
Payroll Processing Fees	5103	10,202	7,914	(2,288)
License/Dues & Other Fees	5581	29,328	30,805	1,477
HSA/FSA Administrative Expenses	5582	235	0	(235)
401k Administrative Fees	5583	13,450	2,250	(11,200)
HRIS Administrative Fees	5584	<u>11,123</u>	<u>5,205</u>	<u>(5,917)</u>
Total Licenses, Dues and Other Fees		87,079	102,105	15,025
Amortization and Depreciation				
Depreciation Expense	5901	<u>8,854</u>	<u>22,769</u>	<u>13,915</u>
Total Amortization and Depreciation		8,854	22,769	13,915
Miscellaneous				
Bank Fees	5102	45	875	830



**CareerSource Pinellas**

Statement of Revenues and Expenditures - Unposted Transactions Included In Report

From 7/1/2022 Through 6/30/2023

(In Whole Numbers)

		<u>Actual 2022-2023</u>	<u>Actual 2021-2022</u>	<u>Variance</u>
Other Expense	5700	13,209	(6,526)	(19,735)
Vehicle Expenses	5701	301	230	(71)
Penalties\Disallowed Expenses	5710	<u>2,215</u>	<u>1,862,990</u>	<u>1,860,775</u>
Total Miscellaneous		<u>15,769</u>	<u>1,857,569</u>	<u>1,841,800</u>
Total Expenditures		<u>9,347,179</u>	<u>9,531,334</u>	<u>184,155</u>
Net Revenue over (under) Expenditures		<u>23,445</u>	<u>(1,934,014)</u>	<u>1,957,459</u>

**CareerSource Pinellas**  
Statement of Revenues and Expenditures  
From 7/1/2022 Through 6/30/2023  
(In Whole Numbers)

		<u>Actual YTD</u>	<u>YTD Budget Mod II</u>	<u>YTD Budget Variance</u>	<u>Total Budget Mod II</u>	<u>Budget Remaining</u>
Revenue						
Operating Revenue						
Grant Revenue						
Grant Revenue - Federal	3000	<u>9,221,292</u>	<u>9,106,182</u>	<u>115,110</u>	<u>9,106,182</u>	<u>115,110</u>
Total Grant Revenue		<u>9,221,292</u>	<u>9,106,182</u>	<u>115,110</u>	<u>9,106,182</u>	<u>115,110</u>
Contributions						
Corporate Revenue	3100	<u>3,530</u>	<u>2,500</u>	<u>1,030</u>	<u>2,500</u>	<u>1,030</u>
Sponsorship Revenue	3101	<u>0</u>	<u>3,000</u>	<u>(3,000)</u>	<u>3,000</u>	<u>(3,000)</u>
Total Contributions		<u>3,530</u>	<u>5,500</u>	<u>(1,970)</u>	<u>5,500</u>	<u>(1,970)</u>
Program Revenue						
Ticket to Work Revenue	3103	<u>108,820</u>	<u>100,000</u>	<u>8,820</u>	<u>100,000</u>	<u>8,820</u>
Total Program Revenue		<u>108,820</u>	<u>100,000</u>	<u>8,820</u>	<u>100,000</u>	<u>8,820</u>
Investment Income						
Interest/Dividends	3200	<u>36,550</u>	<u>33,000</u>	<u>3,550</u>	<u>33,000</u>	<u>3,550</u>
Total Investment Income		<u>36,550</u>	<u>33,000</u>	<u>3,550</u>	<u>33,000</u>	<u>3,550</u>
Other Income						
Other Revenues	3300	<u>431</u>	<u>0</u>	<u>431</u>	<u>0</u>	<u>431</u>
Total Other Income		<u>431</u>	<u>0</u>	<u>431</u>	<u>0</u>	<u>431</u>
Total Operating Revenue		<u>9,370,624</u>	<u>9,244,682</u>	<u>125,942</u>	<u>9,244,682</u>	<u>125,942</u>
Total Revenue		<u>9,370,624</u>	<u>9,244,682</u>	<u>125,942</u>	<u>9,244,682</u>	<u>125,942</u>
Expenditures						
Personnel Expenses						
Salary Expense	5000	<u>3,264,295</u>	<u>3,018,523</u>	<u>(245,772)</u>	<u>3,018,523</u>	<u>(245,772)</u>
Salary Expense - Benefit Stipend	5005	<u>671,462</u>	<u>637,500</u>	<u>(33,962)</u>	<u>637,500</u>	<u>(33,962)</u>
Payroll Taxes	5050	<u>285,940</u>	<u>295,230</u>	<u>9,290</u>	<u>295,230</u>	<u>9,290</u>
Fringe Benefits (ER Paid)	5060	<u>34,805</u>	<u>37,200</u>	<u>2,395</u>	<u>37,200</u>	<u>2,395</u>
Retirement	5090	<u>151,677</u>	<u>181,871</u>	<u>30,194</u>	<u>181,871</u>	<u>30,194</u>
Total Personnel Expenses		<u>4,408,180</u>	<u>4,170,324</u>	<u>(237,856)</u>	<u>4,170,324</u>	<u>(237,856)</u>
Program Expenses						
Operating Supplies	5303	<u>118</u>	<u>1,200</u>	<u>1,082</u>	<u>1,200</u>	<u>1,082</u>
Food and Beverages	5310	<u>2,734</u>	<u>2,400</u>	<u>(334)</u>	<u>2,400</u>	<u>(334)</u>
Communications	5500	<u>97,695</u>	<u>95,856</u>	<u>(1,839)</u>	<u>95,856</u>	<u>(1,839)</u>
Outreach/Marketing	5520	<u>35,416</u>	<u>36,400</u>	<u>984</u>	<u>36,400</u>	<u>984</u>
Service Provider Contract	8000	<u>327,636</u>	<u>425,000</u>	<u>97,365</u>	<u>425,000</u>	<u>97,365</u>
One-Stop Operator	8100	<u>45,885</u>	<u>45,000</u>	<u>(885)</u>	<u>45,000</u>	<u>(885)</u>
Internal Monitoring	8200	<u>67,928</u>	<u>65,000</u>	<u>(2,928)</u>	<u>65,000</u>	<u>(2,928)</u>
OJT	8300	<u>798,951</u>	<u>485,000</u>	<u>(313,951)</u>	<u>485,000</u>	<u>(313,951)</u>

**CareerSource Pinellas**  
Statement of Revenues and Expenditures  
From 7/1/2022 Through 6/30/2023  
(In Whole Numbers)

		Actual YTD	YTD Budget Mod II	YTD Budget Variance	Total Budget Mod II	Budget Remaining
Paid Work Experience	8320	105,254	144,000	38,746	144,000	38,746
Apprenticeships	8330	0	90,000	90,000	90,000	90,000
Workforce Services	8335	64,900	72,000	7,100	72,000	7,100
Youth Stipends	8340	12,581	20,000	7,419	20,000	7,419
Other Customer Support Services	8341	23,803	33,600	9,797	33,600	9,797
Customer Training	8342	1,677,966	1,750,950	72,984	1,750,950	72,984
Customer Supportive Services	8343	1,301	30,000	28,699	30,000	28,699
Licensures	8344	295	0	(295)	0	(295)
Training Related Material	8345	55,134	72,600	17,466	72,600	17,466
Fees/exams/certifications	8346	18,800	33,000	14,200	33,000	14,200
Total Program Expenses		3,336,397	3,402,006	65,609	3,402,006	65,609
Professional Fees						
Accounting/Audit Fees	5100	22,407	35,000	12,593	35,000	12,593
Legal Fees	5101	61,775	90,000	28,225	90,000	28,225
Professional Service	5104	136,719	137,480	761	137,480	761
Legal (Lobbying)	5105	25,792	30,000	4,209	30,000	4,209
Contract Labor	5170	146,480	116,800	(29,680)	116,800	(29,680)
Contract IT Services	5171	242,896	230,628	(12,268)	230,628	(12,268)
Cybersecurity - IT	5172	47,750	43,200	(4,550)	43,200	(4,550)
Total Professional Fees		683,819	683,108	(711)	683,108	(711)
Supplies						
Office Supplies	5302	23,893	17,940	(5,953)	17,940	(5,953)
Postage/Shipping	5307	3,597	4,500	903	4,500	903
Document Shredding	5308	1,938	950	(988)	950	(988)
Total Supplies		29,428	23,390	(6,038)	23,390	(6,038)
Insurance						
Insurance - Commercial Property	5400	6,727	23,900	17,173	23,900	17,173
Insurance - General Liability	5401	77,841	59,784	(18,057)	59,784	(18,057)
Insurance - Workers Comp	5403	15,758	37,043	21,285	37,043	21,285
Insurance - Auto	5404	8,530	4,900	(3,630)	4,900	(3,630)
Total Insurance		108,856	125,627	16,771	125,627	16,771
Occupancy						
Office Rent/Lease	5200	271,620	253,679	(17,941)	253,679	(17,941)
Utilities	5202	33,638	34,300	662	34,300	662
Repairs & Maintenance	5203	8,929	9,980	1,051	9,980	1,051
Security	5204	395	468	73	468	73
Janitorial Expense	5205	38,799	44,130	5,331	44,130	5,331
Pest Control	5206	2,664	2,352	(312)	2,352	(312)

**CareerSource Pinellas**  
Statement of Revenues and Expenditures  
From 7/1/2022 Through 6/30/2023  
(In Whole Numbers)

		Actual YTD	YTD Budget Mod II	YTD Budget Variance	Total Budget Mod II	Budget Remaining
Total Occupancy		<u>356,045</u>	<u>344,909</u>	<u>(11,136)</u>	<u>344,909</u>	<u>(11,136)</u>
Office Equipment						
Equipment Rent/Lease	5300	27,288	31,636	4,348	31,636	4,348
Copy Machine Usage/Maintenance	5301	10,286	9,120	(1,166)	9,120	(1,166)
Comp Software/License/Maintenance	5304	185,257	139,573	(45,684)	139,573	(45,684)
Equipment < \$5,000	5305	<u>25,615</u>	<u>32,500</u>	<u>6,885</u>	<u>32,500</u>	<u>6,885</u>
Total Office Equipment		<u>248,446</u>	<u>212,829</u>	<u>(35,617)</u>	<u>212,829</u>	<u>(35,617)</u>
Travel and Meetings						
Travel - Mileage	5540	14,573	9,000	(5,573)	9,000	(5,573)
Travel - Out of Town	5541	35,968	32,700	(3,268)	32,700	(3,268)
Meetings/Conferences	5560	<u>13,765</u>	<u>16,750</u>	<u>2,985</u>	<u>16,750</u>	<u>2,985</u>
Total Travel and Meetings		<u>64,306</u>	<u>58,450</u>	<u>(5,856)</u>	<u>58,450</u>	<u>(5,856)</u>
Licenses, Dues and Other Fees						
Staff Training/Education	5052	17,801	24,950	7,149	24,950	7,149
Recruitment	5095	4,940	18,700	13,760	18,700	13,760
Payroll Processing Fees	5103	10,202	8,950	(1,252)	8,950	(1,252)
License/Dues & Other Fees	5581	29,328	40,384	11,056	40,384	11,056
HSA\FSA Administrative Expenses	5582	235	600	365	600	365
401k Administrative Fees	5583	13,450	12,000	(1,450)	12,000	(1,450)
HRIS Administrative Fees	5584	<u>11,123</u>	<u>8,400</u>	<u>(2,723)</u>	<u>8,400</u>	<u>(2,723)</u>
Total Licenses, Dues and Other Fees		<u>87,079</u>	<u>113,984</u>	<u>26,905</u>	<u>113,984</u>	<u>26,905</u>
Amortization and Depreciation						
Depreciation Expense	5901	<u>8,854</u>	<u>8,900</u>	<u>46</u>	<u>8,900</u>	<u>46</u>
Total Amortization and Depreciation		<u>8,854</u>	<u>8,900</u>	<u>46</u>	<u>8,900</u>	<u>46</u>
Miscellaneous						
Bank Fees	5102	45	0	(45)	0	(45)
Other Expense	5700	13,209	18,175	4,966	18,175	4,966
Vehicle Expenses	5701	301	255	(46)	255	(46)
Penalties\Disallowed Expenses	5710	<u>2,215</u>	<u>0</u>	<u>(2,215)</u>	<u>0</u>	<u>(2,215)</u>
Total Miscellaneous		<u>15,769</u>	<u>18,430</u>	<u>2,661</u>	<u>18,430</u>	<u>2,661</u>
Total Expenditures		<u>9,347,179</u>	<u>9,161,957</u>	<u>(185,222)</u>	<u>9,161,957</u>	<u>(185,222)</u>
Net Revenue over (under) Expenditures		<u>23,445</u>	<u>82,725</u>	<u>(59,280)</u>	<u>82,725</u>	<u>(59,280)</u>



**CareerSource Pinellas**  
**Cost Allocation/Expenditure Report**  
**For the Fiscal Year Ended June 30, 2023**

	WIOA	Employment Services	WTP	SNAP	TAA	Total Direct Grants and Spec Projects	Total
Approved 2022-2023 Planning Budget	5,029,854	1,345,870	2,237,000	345,000	96,000	37,040	9,090,764
Approved Budget Modification #1	55,958	62,500			(66,000)	5,000	57,458
Approved Budget Modification #2	-		-	-	-	13,735	13,735
Approved 2022-2023 Planning Budget	<b>5,085,812</b>	<b>1,408,370</b>	<b>2,237,000</b>	<b>345,000</b>	<b>30,000</b>	<b>55,775</b>	<b>9,161,957</b>
<b>Expenditures to Date:</b>							
<b>Pooled Costs</b>							-
Administrative	424,951	135,222	237,607	42,867	666	13,515	<b>854,828</b>
MIS\Technology	2,089	91,401	23,237	1,866	27	-	<b>118,620</b>
Outreach and Marketing	2,448	115,857	26,954	2,645	27	-	<b>147,931</b>
Staff Training and Development	(26)	7,061	2,122	-	-	-	<b>9,157</b>
One-Stop Cost Pool	6,851	296,437	78,139	9,423	190	-	<b>391,040</b>
Program Management	534,734	273,893	369,172	118,122	1	-	<b>1,295,922</b>
Business Services	670,807	68,408	285,227	26,316	-	-	<b>1,050,758</b>
Indirect Program	9,912	2,758	4,376	808	7	271	<b>18,132</b>
<b>Total Pooled Costs</b>	<b>1,651,766</b>	<b>991,037</b>	<b>1,026,834</b>	<b>202,047</b>	<b>918</b>	<b>13,786</b>	<b>3,886,388</b>
	33%	67%	46%	49%	9%	11%	42%
<b>Direct Costs</b>							
Personnel Expenses	862,928	245,094	466,045	183,664	30	5,557	1,763,318
Service Provider Contracts	323,495	-	4,140	-	-	-	327,635
Workbased Learning Initiatives	382,418	-	521,787	-	-	-	904,205
Training and Support Services	1,731,974	43,360	46,954	1,298	7,261	1,900	1,832,747
Other Direct Operating Costs	106,688	208,476	183,248	28,037	1,793	104,644	632,886
<b>Total Direct Costs</b>	<b>3,407,503</b>	<b>496,930</b>	<b>1,222,174</b>	<b>212,999</b>	<b>9,084</b>	<b>112,101</b>	<b>5,460,791</b>
	67%	33%	54%	51%	91%	89%	58%
<b>Total Costs</b>	<b>5,059,269</b>	<b>1,487,967</b>	<b>2,249,008</b>	<b>415,046</b>	<b>10,002</b>	<b>125,887</b>	<b>9,347,179</b>
<b>Unexpended Budget Balance</b>	<b>26,543</b>	<b>(79,597)</b>	<b>(12,008)</b>	<b>(70,046)</b>	<b>19,998</b>	<b>(70,112)</b>	<b>(185,222)</b>
<b>Percentage of Budget Expended</b>	<b>99.5%</b>	<b>105.7%</b>	<b>100.5%</b>	<b>120.3%</b>	<b>33.3%</b>	<b>225.7%</b>	<b>102.0%</b>



**CareerSource Pinellas**  
**Pooled Cost Expenditure Report**  
**For the Fiscal Year Ended June 30, 2023**

Expenditure	Admin	MIS/Tech Cost Pool	Outreach & Marketing Cost Pool	Staff Training Cost Pool	One-Stop Cost Pool	Case Mgmt Cost Pool	Business Services Cost Pool	Program Indirect	Total
Salary Expense	473,430	-	-	-	-	810,106	698,142	12,188	<b>1,993,866</b>
Salary Expense - Benefit Stipend	58,466	-	-	-	-	167,448	147,030	1,117	<b>374,061</b>
Payroll Taxes	37,167	-	-	-	-	66,758	64,987	945	<b>169,857</b>
Fringe Benefits (ER Paid)	4,879	-	-	-	-	9,863	6,790	-	<b>21,532</b>
Retirement	20,380	-	-	-	-	35,856	28,665	646	<b>85,547</b>
<b>Total Salary and Benefits</b>	<b>594,322</b>	-	-	-	-	<b>1,090,031</b>	<b>945,614</b>	<b>14,896</b>	<b>2,644,863</b>
Office Rent/Lease	33,860	-	-	-	148,499	35,337	37,081	947	<b>255,724</b>
Professional Service	31,098	-	102,926	-	-	-	-	515	<b>134,539</b>
Comp Software/License/Maintenance	10,064	17,782	-	-	51,188	20,935	-	274	<b>100,243</b>
Contract Labor	570	74,650	-	-	-	-	-	15	<b>75,235</b>
Internal Monitoring	24,754	-	-	-	-	43,174	-	-	<b>67,928</b>
Insurance - General Liability	15,472	84	-	-	-	27,570	7,883	407	<b>51,416</b>
Communications	6,272	462	-	-	20,694	9,946	10,541	170	<b>48,085</b>
One-Stop Operator	-	-	-	-	45,885	-	-	-	<b>45,885</b>
Janitorial Expense	-	-	-	-	38,799	-	-	-	<b>38,799</b>
Legal Fees	36,139	-	-	-	-	-	-	-	<b>36,139</b>
Utilities	-	-	-	-	33,606	-	-	-	<b>33,606</b>
Outreach/Marketing	96	322	32,219	-	40	-	8	-	<b>32,685</b>
Contract IT Services	6,353	4,850	-	-	-	10,563	5,921	167	<b>27,854</b>
License/Dues & Other Fees	2,235	250	10,387	-	-	815	12,510	56	<b>26,253</b>
Equipment < \$5,000	-	17,126	-	-	280	7,360	850	-	<b>25,616</b>
Travel - Out of Town	14,155	-	-	-	-	3,887	5,965	-	<b>24,007</b>
Equipment Rent/Lease	1,483	-	-	-	18,581	1,196	1,336	43	<b>22,639</b>
Accounting/Audit Fees	22,407	-	-	-	-	-	-	-	<b>22,407</b>
Workforce Services	-	-	-	-	-	21,633	-	-	<b>21,633</b>
Office Supplies	2,356	-	1,180	-	8,937	2,312	4,114	60	<b>18,959</b>
Staff Training/Education	4,345	-	-	9,157	-	1,324	1,475	-	<b>16,301</b>
401k Administrative Fees	13,450	-	-	-	-	-	-	-	<b>13,450</b>
HRIS Administrative Fees	10,814	-	-	-	-	-	-	309	<b>11,123</b>
Meetings/Conferences	5,456	-	62	-	-	3,340	1,975	-	<b>10,833</b>
Payroll Processing Fees	9,930	-	-	-	-	-	-	272	<b>10,202</b>
Insurance - Workers Comp	1,854	-	-	-	-	4,668	3,400	(38)	<b>9,884</b>
Copy Machine Usage/Maintenance	992	-	-	-	6,321	932	1,308	28	<b>9,581</b>
Repairs & Maintenance	-	-	1,155	-	6,037	-	1,736	-	<b>8,928</b>
Insurance - Auto	3,150	-	-	-	-	5,380	-	-	<b>8,530</b>
Cybersecurity - IT	898	3,094	-	-	-	2,020	785	-	<b>6,797</b>
Travel - Mileage	752	-	-	-	-	250	5,717	-	<b>6,719</b>
Insurance - Commercial Property	459	-	-	-	5,180	471	471	12	<b>6,593</b>
Recruitment	516	-	-	-	-	1,631	1,334	-	<b>3,481</b>
Postage/Shipping	226	-	-	-	2,811	190	241	-	<b>3,468</b>
Pest Control	-	-	-	-	2,664	-	-	-	<b>2,664</b>
Document Shredding	253	-	-	-	1,053	215	370	-	<b>1,891</b>
Fees/exams/certifications	-	-	-	-	-	400	-	-	<b>400</b>
Security	-	-	-	-	395	-	-	-	<b>395</b>
Vehicle Expenses	-	-	-	-	71	230	-	-	<b>301</b>
HSA\FSA Administrative Expenses	93	-	-	-	-	112	21	2	<b>228</b>
Operating Supplies	-	-	-	-	-	-	118	-	<b>118</b>
Bank Fees	4	-	-	-	-	-	-	-	<b>4</b>
Other Expense/Rounding	-	-	2	-	(1)	-	(16)	(3)	<b>(18)</b>
	<b>854,828</b>	<b>118,620</b>	<b>147,931</b>	<b>9,157</b>	<b>391,040</b>	<b>1,295,922</b>	<b>1,050,758</b>	<b>18,132</b>	<b>3,886,388</b>

[illegible]



## INFORMATION ITEM 15

### Insurance Update

Hub International, the organization's Insurance Broker, obtained coverage business insurance renewals effective July 1, 2023.

- Expiring Premium - \$118,109
- 2023-2024 Premium - \$115,094

See attached policy register for additional information for 2023-2024 insurance coverages premiums.

	<b>Premiums</b>			<b>Budget</b>	
	<b>2022-2023</b>	<b>2023-2024</b>	<b>Variance</b>	<b>2023-2024</b>	<b>Variance</b>
Commercial Package	37,221	41,168	(3,946)	57,000	15,832
Commercial Umbrella	13,093	14,612	(1,519)		(14,612)
Commercial Crime	5,268	5,546	(278)		(5,546)
Mgmt Liability	5,216	5,423	(207)		(5,423)
<b>Sub-total</b>	<b>60,798</b>	<b>66,747</b>	<b>(5,949)</b>	<b>57,000</b>	<b>(9,747)</b>
Cyber	16,761	10,820	5,941	20,000	9,180
Commercial Property	6,727	8,823	(2,096)	9,000	177
Auto	8,064	1,846	6,218	-	(1,846)
Workers' Comp	25,758	26,857	(1,099)	34,054	7,197
<b>Total</b>	<b>\$ 118,109</b>	<b>\$ 115,094</b>	<b>\$ 3,015</b>	<b>\$ 120,054</b>	<b>\$ 4,960</b>

Attached are marketing summary and policy register for additional information for 2023-2024 insurance coverages premiums. In addition, loss runs for any claims paid are also included. Charles Chunn, Executive VP from HUB, will present an update on our 2023-2024 insurance coverage.

#### **Highlights/Observations**

- Cyber Insurance decreased because of significant security improvements.
- Management Liability: Increased D&O retention from \$1,000 to \$2,500 and EPLI retention from \$2,500 to \$5,000.
- Package and Umbrella: 9.4% and 8.7% increases respectively; not marketed because increase is low in current Florida marketplace
- Property – Windstorm/Hail: Increase is low end of spectrum in current Florida Workplace.
- Workers' Compensation: Coverage not marketed; dividend plan remains competitive.



WorkNet Pinellas, Inc.  
7/1/2023-24 Marketing Summary



Coverage	Markets Approached	Results	Results
Automobile	AmGuard Insurance Co. (Care Providers)	New	Quoted Premium: \$1,846 for Hired & Non-Owned Auto (HNOA) Coverage only. Coverage was not marketed. Mono-line Hired and Non-Owned Auto Coverage has limited availability in the marketplace. Usually, all lines of coverage are required from admitted insurance carriers to be able to quote HNOA. Non-admitted insurance carriers for HNOA are utilized as a last resort because of non-competitive pricing.
Cyber Liability	Trisura Specialty AWAC AXA XL AXIS Resilience	Incumbent Quoted Declined Declined Declined Declined	Quoted Premium: \$10,080, premium has decreased from \$15,788 expiring because of significant security improvements by WorkNet Pinellas Revenue Threshold Class of Business Class of Business Revenue Threshold
Management Liability	Hanover Insurance Company CNA Chubb Harco National Travelers Zurich	Incumbent Quoted Declined Declined Quoted Quoted Declined	Quoted Premium: \$10,892 compared to \$10,484 expiring. Increased Directors & Officers (D&O) Retention from \$1,000 to \$2,500 and Employment Practices Liability (EPLI) retention from \$2,500 to \$5,000 Loss History Loss History Quoted Premium: \$14,505 with \$10,000 D&O Retention and \$75,000 EPLI Retention Quoted Premium: \$10,809 with \$0 D&O Retention and \$10,000 EPLI Retention Out of Appetite
Package	AmGuard Insurance Co. (Care Providers)	Incumbent Quoted Only	Quoted Premium: \$39,338, a 9.4% increase over expiring Coverage was not marketed because the increase is low in the current FL marketplace.
Umbrella	AmGuard Insurance Co. (Care Providers)	Incumbent Quoted Only	Quoted Premium: \$14,236, a 8.7% increase over expiring Sub-Limit of \$1,000,000 for Abuse or Molestation Added Coverage was not marketed because the increase is low in the current FL marketplace.
Property - Windstorm/Hail	Underwriters at Lloyd's London AmRisc ICAT Velocity	Incumbent Quoted Declined Declined Declined	Quoted Premium: \$8,103 compared to \$6,157 which is at the low end of the spectrum for premium increases in the current FL Wind/Hai Marketplace. Deductible remained the same as expiring. Building Coverage Required Age at Location #2 and #4 Age at Location #2 and #4
Workers' Compensation	Technology Ins. Co.	Incumbent Quoted Only	Quoted Premium: \$26,857 based on \$3,090,000 payroll and 66% experience modifier Expiring Premium: \$25,758 based on \$3,000,000 payroll and 62% experience modifier.  Coverage was not marketed. Dividend Plan remains competitive in the current FL marketplace.

WorkNet Pinellas, Inc.  
Policy Register



Coverage	Insurer	Policy Number	Effective Date	Expiration Date	Limits of Coverage	Perils Insured / Deductible / Coinsurance / Valuation	Annual Premium Taxes & Fees
Commercial Property (Wind/Hail)	Underwriters at Lloyd's London	BA22294W300786	7/01/2023	7/01/2024			\$ 8,823.15
				13805 58th Ave St. N #2-140 Clearwater FL	Business Personal Property Business Income	\$53,100 \$150,000	Wind and/or Hail 5% of Policy Total Insured Value for Each Separate Item, Per Occurrence, subject to a Minimum of \$5,000 Coinsurance: 90% Valuation BPP: Replacement Cost Valuation BI: Actual Los Sustained
				2312 Gulf to Bay Blvd Clearwater FL	Business Personal Property	\$376,625	Wind and/or Hail 5% of Policy Total Insured Value for Each Separate Item, Per Occurrence, subject to a Minimum of \$5,000 Coinsurance: 90% Valuation: Replacement Cost
				682 E Klosterman Road Tarpon Springs FL	Business Personal Property	\$5,000	Wind and/or Hail 5% of Policy Total Insured Value for Each Separate Item, Per Occurrence, subject to a Minimum of \$5,000 Coinsurance: 90% Valuation: Replacement Cost
				3420 8th Avenue South St. Petersburg, FL	Business Personal Property	\$276,505	Wind and/or Hail 5% of Policy Total Insured Value for Each Separate Item, Per Occurrence, subject to a Minimum of \$5,000 Coinsurance: 90% Valuation: Replacement Cost
Total Insurable Values						\$861,230	
Commercial Package	AmGUARD Insurance Company	C1GP404709	7/01/2023	7/01/2024		Premium includes \$1,000 Care Providers Fee	\$ 41,167.51
			Property (All Other Perils excludes Wind/Hail)	13805 58th Ave St. N #2-140 Clearwater FL	Business Personal Property Business Income per Extension Endorsement	\$53,100 \$150,000	All Other Perils including Theft \$1,000 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				2312 Gulf to Bay Blvd Clearwater FL	Business Personal Property	\$376,625	All Other Perils including Theft \$1,000 Deductible; Coinsurance: 80%
				682 E Klosterman Road Tarpon Springs FL	Business Personal Property	\$5,000	All Other Perils including Theft \$1,000 Deductible; Coinsurance: 80%
				3420 8th Avenue South St. Petersburg, FL	Business Personal Property	\$276,505	All Other Perils including Theft \$1,000 Deductible; Coinsurance: 80%
Total Insurable Values						\$861,230	

WorkNet Pinellas, Inc.  
Policy Register



Coverage	Insurer	Policy Number	Effective Date	Expiration Date	Limits of Coverage	Perils Insured / Deductible / Coinsurance / Valuation	Annual Premium Taxes & Fees
Electronic Data & Equipment (EDP)				13805 58th Ave St. N #2-140 Clearwater FL	Computer Equipment: Media:	\$50,000 \$25,000	Risks of Direct Physical Loss \$500 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				2312 Gulf to Bay Blvd Clearwater FL	Computer Equipment: Media:	\$125,000 \$75,000	Risks of Direct Physical Loss \$500 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				682 E Klosterman Road Tarpon Springs FL	Computer Equipment: Media:	\$5,000 \$1,000	Risks of Direct Physical Loss \$500 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				3420 8th Avenue South St. Petersburg, FL	Computer Equipment: Media:	\$125,000 \$50,000	Risks of Direct Physical Loss \$500 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				5175 45th Street North St. Petersburg, FL	Computer Equipment: Media:	\$5,000 \$1,000	Risks of Direct Physical Loss \$500 Deductible; Coinsurance: 80% Valuation: Replacement Cost
				<b>Computer Equipment:</b>		<b>\$310,000</b>	
				<b>Total Insurable Values Media:</b>		<b>\$152,000</b>	
				General Liability	Locations Covered: Same as EDP Locations		
				General Aggregate Per Location	\$	3,000,000	
				Products and Completed Operations Aggregate	\$	3,000,000	
General Liability				Personal and Advertising Injury	\$	1,000,000	None
				Each Occurrence	\$	1,000,000	None
				Damage to Premises Rented to You (Any one premises) - Limit per Extension Endorsement	\$	1,000,000	None
				Medical Expenses/Medical Payments Any One Person - Limit per Extension Endorsement	\$	20,000	None
				Employee Benefits Liability	Each Employee/Aggregate Limit (Claims Made Policy Form/Retro Date 6/10/2014)	\$ 1,000,000	\$ 1,000

WorkNet Pinellas, Inc.  
Policy Register



Coverage	Insurer	Policy Number	Effective Date	Expiration Date	Limits of Coverage	Perils Insured / Deductible / Coinsurance / Valuation	Annual Premium Taxes & Fees
			Sexual or Physical Abuse Liability (Occurrence Form)	Each Act of Sexual or Physical Abuse	\$ 1,000,000	None	
				Aggregate	\$ 3,000,000		
Commercial Umbrella	AmGUARD Insurance Company	C3GP401987	7/01/2023	7/01/2024			\$ 14,611.50
Applies Excess of: Employer's Liability; General Liability; Auto Liability; and Employee Benefits Liability				Each Occurrence	\$ 3,000,000	Coverage B - \$10,000 (Applies when underlying insurance does not cover exposure but Umbrella policy does.)	
				Personal & Advertising Injury	\$ 3,000,000		
				Aggregate	\$ 3,000,000		
Abuse or Molestation Sublimit				Each Act	\$ 1,000,000	Coverage B - \$10,000 (Applies when underlying insurance does not cover exposure but Umbrella policy does.)	
				Aggregate	\$ 1,000,000		
Commercial Crime	Hanover Insurance Company	LHCH30270501	7/01/2023	7/01/2024			\$ 5,545.55
			Crime	Employee Theft	\$ 1,000,000	\$ 5,000	
				ERISA Fidelity	\$ 1,000,000	\$ 5,000	
				Client Property	\$ 1,000,000	\$ 5,000	
				Forgery or Alteration	\$ 1,000,000	\$ 5,000	
				Premises Coverage	\$ 1,000,000	\$ 5,000	
				Transit Coverage	\$ 1,000,000	\$ 5,000	
				Computer Fraud	\$ 1,000,000	\$ 5,000	
				Computer Crime Restoration Expense	\$ 150,000	\$ 5,000	

WorkNet Pinellas, Inc.  
Policy Register



Coverage	Insurer	Policy Number	Effective Date	Expiration Date	Limits of Coverage	Perils Insured / Deductible / Coinsurance / Valuation	Annual Premium Taxes & Fees
				Funds Transfer Fraud	\$ 1,000,000	\$ 5,000	
				Credit, Debit or Charge Card Fraud	\$ 1,000,000	\$ 5,000	
				Money Orders and Counterfeit Money	\$ 1,000,000	\$ 5,000	
				Personal Accounts Protection - Forgery or Alteration	\$ 1,000,000	\$ 5,000	
				Personal Accounts Protection-Identity Fraud Reimbursement	\$ 50,000	\$ 0	
				Investigative Expense	\$ 150,000	\$ 0	
Management Liability	Hanover Insurance Company	LHCH30270501	7/01/2023	7/01/2024			\$ 5,422.69
				Directors & Officers Liability	Maximum Policy Aggregate \$ 1,000,000	A) Individual Non-Indemnified Claim \$0 B) Individual Indemnified Claim \$2,500 C) Entity Claim \$2,500	
				Directors & Officers Liability	Additional Limit for Executives \$ 1,000,000	\$ 2,500	
				Employment Practices Liability	Maximum Policy Aggregate \$ 1,000,000	\$ 5,000	
				Fiduciary Liability	Maximum Policy Aggregate \$ 1,000,000	\$ 0	
				All Coverage Parts	Separate Defense Expense Limit \$ 1,000,000	Per Coverage Part	
Commercial Auto Liability - Hired and Non-Owned Autos	AmGUARD Insurance Company	C2GP403342	7/01/2023	7/01/2024			\$ 1,846.00
				Liability	Bodily Injury and Property Damage Combined Single Limit Each Accident \$ 1,000,000		

WorkNet Pinellas, Inc.  
Policy Register



Coverage	Insurer	Policy Number	Effective Date	Expiration Date	Limits of Coverage	Perils Insured / Deductible / Coinsurance / Valuation	Annual Premium Taxes & Fees
Cyber/Privacy/Network Security Liability	Trisura Specialty Insurance Company	ATB671691602	7/01/2023	7/01/2024			\$ 10,820.25
Maximum Policy Aggregate					\$ 1,000,000		
		Coverage	Each/Claim Aggregate Limit		Deductible Each Claim		
		Information Privacy Liability	\$	1,000,000	\$	10,000	
		Regulatory Liability	\$	1,000,000	\$	10,000	
		Event Response and Management	\$	1,000,000	\$	10,000	
		PCI DSS Liability Coverage	\$	1,000,000	\$	10,000	
		Network Security Liability	\$	1,000,000	\$	10,000	
		Event Response and Recovery	\$	1,000,000	\$	10,000	
		Direct Business Interruption	\$	1,000,000		\$10,000 Deductible/ 8 Hour Waiting Period	
		Contingent Business Interruption	\$	1,000,000		\$10,000 Deductible/ 8 Hour Waiting Period	
		Cyber Extortion Coverage	\$	1,000,000	\$	10,000	
		Social Engineering	\$	100,000	\$	10,000	
		Computer Fraud	\$	100,000	\$	10,000	
		Media Liability	\$	1,000,000	\$	10,000	
		Media Event Resonse	\$	1,000,000	\$	10,000	
		Reputational Harm	\$	1,000,000		\$10,000 Deductible/ 180 Days Indemnity Period	
		Direct System Failure	\$	1,000,000		\$10,000 Deductible/ 8 Hour Waiting Period	
		Contingent System Failure	\$	1,000,000		\$10,000 Deductible/ 8 Hour Waiting Period	
Workers' Compensation	Technology Insurance Company, Inc.	TWC4135982	7/01/2023	7/01/2024	Coverage A - Workers' Compensation - Statutory		\$ 26,857.00
		Code 8864 Social Svcs	\$	3,090,000	Coverage B - Employer's Liability \$500,000 Each Accident \$500,000 Disease - Policy Limit \$500,000 Disease - Each Employee		
TOTAL PREMIUM							\$ 115,093.65

**BUSINESS LOSS RUN**

**Agency Name:** HUB INTERNATIONAL MIDWEST LIMITED CLC  
**Insured Name:** WORKNET PINELLAS, INC. DBA CAREERSOURCE PINELLAS

**Current As of Date:** 03/17/2023  
**Number of Loss Years Requested:** 10

**Loss Run Summary:**

Policy #	Policy Term	Policy Type	No of Claims/Occurrences	Loss & Expense Reserves	Losses Paid	Expenses Paid	Losses & Expenses Paid	Recovery	Total Incurred
82501459	07/01/2017 - 07/01/2018	CRIME NFPO	1	\$0	\$9,700	\$0	\$9,700	\$0	\$9,700
82501459	07/01/2018 - 07/01/2019	CRIME NFPO	0	\$0	\$0	\$0	\$0	\$0	\$0
82501459	07/01/2017 - 07/01/2018	D&O NFPO	0	\$0	\$0	\$0	\$0	\$0	\$0
82501459	07/01/2018 - 07/01/2019	D&O NFPO	0	\$0	\$0	\$0	\$0	\$0	\$0
82501459	07/01/2017 - 07/01/2018	EPL NFPO	7	\$0	\$0	\$29,511	\$29,511	\$0	\$29,511
82501459	07/01/2018 - 07/01/2019	EPL NFPO	2	\$0	\$117,500	\$59,521	\$177,021	\$0	\$177,021
82501459	07/01/2017 - 07/01/2018	F/L NFPO	0	\$0	\$0	\$0	\$0	\$0	\$0
82501459	07/01/2018 - 07/01/2019	F/L NFPO	0	\$0	\$0	\$0	\$0	\$0	\$0
Totals:			10	\$0	\$127,200	\$89,032	\$216,232	\$0	\$216,232

- SEE IMPORTANT NOTICE FOLLOWING LOSS RUN DETAILS -

**BUSINESS LOSS RUN**

Agency Name: HUB INTERNATIONAL MIDWEST LIMITED CLC  
Insured Name: WORKNET PINELLAS, INC. DBA CAREERSOURCE PINELLAS

Current As of Date: 03/17/2023  
Number of Loss Years Requested: 10

**Loss Run Detail:**

Policy # Claim Reference # Claim/Occurrence # Claimant #	Policy Term Policy Type	Claim Status Claim Type	Loss Date Loss Location	Reported Date Close Date	Loss Reserve Expense Reserve	Losses Paid Expenses Paid Recovery	Losses and Expenses Paid Deductible Amount Total Incurred
82501459 414733 001	07/01/2017 - 07/01/2018 CRIME NFPO	Closed	02/27/2018 FL	03/01/2018 03/11/2019	\$0 \$0	\$9,700 \$0 \$0	\$9,700 \$0 \$9,700
Claimant Name: Worknet Pinellas, Inc. Dba Car Loss Description: Employee theft Writing Company:							
82501459 413931 001	07/01/2017 - 07/01/2018 EPL NFPO	Closed	09/21/2017 FL	03/01/2018 02/17/2019	\$0 \$0	\$0 \$29,511 \$0	\$29,511 \$0 \$29,511
Claimant Name: Brandon Courtney Riley Loss Description: Disability/Discharge Writing Company:							
82501459 425377 002	07/01/2017 - 07/01/2018 EPL NFPO	Closed	02/22/2018 FL	08/16/2018 10/05/2022	\$0 \$0	\$0 \$0 \$0	\$0 \$0 \$0
Claimant Name: Florida DEO Loss Description: Breach of Written Employment Contract Writing Company:							
82501459 425377 002	07/01/2017 - 07/01/2018 EPL NFPO	Closed	02/22/2018 FL	08/16/2018 10/05/2022	\$0 \$0	\$0 \$0 \$0	\$0 \$0 \$0
Claimant Name: Florida DEO Loss Description: Breach of Written Employment Contract Writing Company:							

- SEE IMPORTANT NOTICE FOLLOWING LOSS RUN DETAILS -



**BUSINESS LOSS RUN**

**Agency Name:** HUB INTERNATIONAL MIDWEST LIMITED CLC  
**Insured Name:** WORKNET PINELLAS, INC. DBA CAREERSOURCE PINELLAS

**Current As of Date:** 03/17/2023  
**Number of Loss Years Requested:** 10

**Loss Run Detail:**

<b>Policy #</b>	<b>Claim Reference #</b>	<b>Claim/Occurrence #</b>	<b>Claimant #</b>	<b>Policy Term</b>	<b>Policy Type</b>	<b>Claim Status</b>	<b>Claim Type</b>	<b>Loss Date</b>	<b>Loss Location</b>	<b>Reported Date</b>	<b>Close Date</b>	<b>Loss Reserve</b>	<b>Expense Reserve</b>	<b>Losses Paid</b>	<b>Expenses Paid</b>	<b>Recovery</b>	<b>Losses and Expenses Paid</b>	<b>Deductible Amount</b>	<b>Total Incurred</b>
82501459	425377			07/01/2017 - 07/01/2018	EPL NFPO	Closed		02/22/2018	FL	08/16/2018	10/05/2022	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
002												\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Claimant Name:</b>				Florida DEO															
<b>Loss Description:</b>				Breach of Written Employment Contract															
<b>Writing Company:</b>																			
82501459	425377			07/01/2017 - 07/01/2018	EPL NFPO	Closed		02/22/2018	FL	08/16/2018	10/05/2022	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
002												\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Claimant Name:</b>				Florida DEO															
<b>Loss Description:</b>				Breach of Written Employment Contract															
<b>Writing Company:</b>																			
82501459	425377			07/01/2017 - 07/01/2018	EPL NFPO	Closed		02/22/2018	FL	08/16/2018	10/05/2022	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
002												\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Claimant Name:</b>				Florida DEO															
<b>Loss Description:</b>				Breach of Written Employment Contract															
<b>Writing Company:</b>																			
82501459	425377			07/01/2017 - 07/01/2018	EPL NFPO	Closed		02/22/2018	FL	08/16/2018	10/05/2022	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
002												\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Claimant Name:</b>				Florida DEO															
<b>Loss Description:</b>				Breach of Written Employment Contract															
<b>Writing Company:</b>																			

- SEE IMPORTANT NOTICE FOLLOWING LOSS RUN DETAILS -

**BUSINESS LOSS RUN**

**Agency Name:** HUB INTERNATIONAL MIDWEST LIMITED CLC  
**Insured Name:** WORKNET PINELLAS, INC. DBA CAREERSOURCE PINELLAS

**Current As of Date:** 03/17/2023  
**Number of Loss Years Requested:** 10

**Loss Run Detail:**

Policy # Claim Reference # Claim/Occurrence # Claimant #	Policy Term Policy Type	Claim Status Claim Type	Loss Date Loss Location	Reported Date Close Date	Loss Reserve Expense Reserve	Losses Paid Expenses Paid Recovery	Losses and Expenses Paid Deductible Amount Total Incurred
82501459 424805 001	07/01/2018 - 07/01/2019 EPL NFPO	Closed	08/09/2018 FL	08/17/2018 01/15/2020	\$0 \$0	\$7,500 \$0 \$0	\$7,500 \$0 \$7,500
Claimant Name: Huey Nguyen Loss Description: Race/Discharge Writing Company:							
82501459 KY19K2023978 001	07/01/2018 - 07/01/2019 EPL NFPO	Closed	01/04/2019 FL	01/11/2019 06/22/2020	\$0 \$0	\$110,000 \$59,521 \$0	\$169,521 \$0 \$169,521
Claimant Name: Juli Garisto Loss Description: Claimant is alleging violation of whistleblower and FMLA. Writing Company:							

- SEE IMPORTANT NOTICE FOLLOWING LOSS RUN DETAILS -

**- IMPORTANT NOTICE -**

**THE INFORMATION CONTAINED HEREIN IS PROVIDED "AS IS" AND HAS NOT BEEN AUDITED OR REVIEWED. WE MAKE NO REPRESENTATION AS TO THE ACCURACY OF THIS INFORMATION. THIS INFORMATION IS NOT INTENDED TO AND SHOULD NOT BE RELIED ON TO COMPLY WITH ANY STATUTE, REGULATION OR OTHER LEGAL OR REGULATORY REQUIREMENT. WE RESERVE THE RIGHT IN OUR DISCRETION TO WITHHOLD SPECIFIC LOSS INFORMATION.**

**BY RECEIVING THIS INFORMATION, RECIPIENT ACKNOWLEDGES AND AGREES THAT: 1.) WE ARE PROVIDING THIS INFORMATION BASED ON RECIPIENT'S EXPRESS REPRESENTATION THAT RECIPIENT IS REQUESTING SUCH INFORMATION ON BEHALF OF AND/OR WITH THE CONSENT OF RECIPIENT'S CUSTOMER; 2.) RECIPIENT WILL USE THIS INFORMATION ONLY FOR ITS OWN INTERNAL PURPOSES OR FOR SUCH PURPOSES AUTHORIZED BY RECIPIENT'S CUSTOMER; 3.) SUCH INFORMATION IS CONFIDENTIAL AND PROPRIETARY AND MAY BE SUBJECT TO PRIVACY LAWS, REGULATIONS OR OTHER LEGAL REQUIREMENT; 4.) RECIPIENT AGREES TO PROTECT AND SAFEGUARD THE INFORMATION FROM UNAUTHORIZED USE OR DISCLOSURE.**

**RHODE ISLAND INSUREDS: IN ACCORDANCE WITH SECTION 27-29-17.5 OF CHAPTER 27-29 OF THE GENERAL LAWS OF RHODE ISLAND, ADDITIONAL INFORMATION ON LOSS RESERVES MAY BE AVAILABLE UPON REQUEST OF THE FIRST NAMED INSURED OR SUCH INSURED'S AUTHORIZED AGENT OR BROKER.**

**FOR QUESTIONS REGARDING THE CONTENT OF THIS CHUBB LOSS RUN REPORT, PLEASE CONTACT YOUR CHUBB OFFICE.**

## BUSINESS LOSS RUN

### Loss Run Header Section:

Agency Name - The name of the current agent or broker associated with the policy.

Current as of Date - This is the date for which the data is valid.

Insured Name - The named insured as stated on the policy of insurance.

Number of Loss Years Requested – This is the 3, 5, 7 or 10 year historical range with the timeframe determined by the most recent policy effective date listed.

### Policy Summary:

Policy Number - The number which uniquely identifies a policy for an insured.

Policy Term - The Effective and Expiration Dates for the Policy Term.

Policy Type - The type of policy issued by the company.

Number of Claims/Occurrences - The number of Claims/Occurrences for each Policy Number, Term and Type.

Loss and Expense Reserves - The sum of the outstanding Loss and Expense Reserves for each Policy Number, Term and Type. “\*” will be displayed for open Specialty claims only.

Losses Paid - The indemnity paid for each Policy Number, Term and Type. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Expenses Paid - The sum of the defense and LAE expenses paid for each Policy Number, Term and Type. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Losses and Expenses Paid - The sum of Losses Paid and Expenses Paid for each Policy Number, Term and Type. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Recovery - The sum of the Salvage/Subrogation Recovery including expenses paid or payments received for each Policy Number, Term and Type. A positive figure indicates that recovery expenses exceeded receipts.

Total Incurred - The sum of the Loss and Expense Reserves and Losses and Expenses Paid including Recovery for each Policy Number, Term and Type. “\*” will be displayed for open Specialty claims only.

Totals:

Number of Claims/Occurrences - The number of Claims/Occurrences for all Policy Numbers, Terms and Types in the Summary Section.

Loss and Expense Reserves - The sum of the outstanding Loss and Expense Reserves for all of the Policy Numbers, Terms and Types in the

## BUSINESS LOSS RUN

Summary Section. This does not include Specialty claims.

Losses Paid - The sum of Losses Paid for all of the Policy Numbers, Terms and Types in the Summary Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Expenses Paid - The sum of Expenses Paid for all of the Policy Numbers, Terms and Types in the Summary Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Losses and Expenses Paid - The sum of Losses Paid and Expenses Paid for all of the Policy Numbers, Terms and Types in the Summary Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Recovery - The sum of the Salvage/Subrogation Recovery including expenses paid or payments received for all of the Policy Numbers, Term and Types in the Summary Section. A positive figure indicates that recovery expenses exceeded receipts.

Total Incurred - The sum of the Loss and Expense Reserves and Losses and Expenses Paid including Recovery for all the Policy Numbers, Term and Types in the Summary Section. “\*” will be displayed for open Specialty claims only.

\* – In the Loss and Expense Reserves column: This information is not disclosed.

TPA - Denotes claims/occurrences processed by a third party administrator (TPA). Can reflect full or partial term TPA. Actual numbers do not include claims/occurrences processed by TPA's.

### Loss Run Details:

Policy # - The number which uniquely identifies a policy for an insured.

Claim Reference # - A unique identifier for a Chubb claim.

Claim/Occurrence # - The unique number for an occurrence of claim associated with a policy. This is used in conjunction with the policy number to identify a claim. It is sequential within a policy number.

Claimant # - The unique number associated with Claimant Name.

Policy Term - The Effective and Expiration Dates for the Policy Term.

Policy Type - The type of policy issued by the company.

Claim Status - The status of a claim as of the Current as of Date. An 'RO' next to the status indicates a Report Only Claim.

Claim Type - The type(s) of loss associated with a coverage on a claim.

Loss Location - The City and State where the loss occurred.

Loss Date - The date on which the loss occurred.

## BUSINESS LOSS RUN

Reported Date - The date on which the loss was reported.

Close Date - The date the claim was closed.

Loss Reserve - The sum of the outstanding Loss Reserve for the Claim/Occurrence in the Detail Section. "\*" will be displayed for open Specialty claims only.

Expense Reserve - The sum of the outstanding Expense Reserve for the Claim/Occurrence in the Detail Section. "\*" will be displayed for open Specialty claims only.

Losses Paid – The indemnity paid for the Claim/Occurrence in the Detail Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Expenses Paid - The sum of the defense and LAE expenses paid for the Claim/Occurrence in the Detail Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Losses and Expenses Paid – The sum of Losses and Expenses Paid for the Claim/Occurrence in the Detail Section. This excludes the Net Salvage/Subrogation and reimbursable deductible amounts actually received.

Recovery - The sum of the Salvage/Subrogation Recovery including expenses paid or payments received for the Claim/Occurrence in the Detail Section. A positive figure indicates that recovery expenses exceeded receipts.

Total Incurred - The sum of the Loss and Expense Reserves and Losses and Expenses Paid including Recovery for the Claim/Occurrence in the Detail Section. "\*" will be displayed for open Specialty claims only.

Claimant Name - The name(s) of the claimant associated with the Claim/Occurrence.

Deductible Amount – Actual deductible recovery, if any, applied to the Claim/Occurrence.

Loss Description - A synopsis of the loss as entered by the claim examiner.

\* – In the Loss and Expense Reserve column: This information is not disclosed.

All dollar amounts displayed represent US dollars.



Report as of: Mar 15, 2023

**ACCOUNT:** **AGENCY:**  
 WORKNET PINELLAS, INCHUB International Midwest Ltd  
 13805 58th St N Ste 2140 4830 W Kennedy Blvd Ste 850  
 Clearwater, FL 337603716Tampa, FL 33609

**LOSS RUN SUMMARY**

LOB	Effective Date	Claims	Paid Loss (Indemnity)	Paid Expenses	Paid Medical	Reserves	Gross Incurred	Recoveries*	Net Incurred
WCC	07/01/2021	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	07/01/2020	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	07/01/2019	2	\$0.00	\$205.28	\$2,932.84	\$0.00	\$3,138.12	\$0.00	\$3,138.12
	03/24/2019	2	\$0.00	\$110.67	\$1,581.06	\$0.00	\$1,691.73	\$0.00	\$1,691.73
	03/24/2018	5	\$0.00	\$249.39	\$3,227.01	\$0.00	\$3,476.40	\$0.00	\$3,476.40

**LOSS RUN DETAIL**

LOB	Policy Period	Policy Number / Claim Number	Coverage Type / Claim Adjuster	Date of Loss / Status	Claimant Name / Claim Description	Accident Description	Nature of Injury / Body Part	Hire Date / Claimant Occupation	Paid Loss (Indemnity)	Paid Expenses	Paid Medical	Reserves / Recoveries*	Gross Incurred / Net Incurred	Risk Location
WCC	07/01/2019 - 06/30/2020	001-WC19A-78562 C00258942-01	MO	09/03/2019	Yvette Reeves	EMPLOYEE JUMPED OUT OF CHAIR TO ASSIST A CUSTOMER AND TWISTED HER LEFT KNEE.	STRAIN	04/06/2015	\$0.00	\$205.28	\$2,932.84	\$0.00	\$3,138.12	3420 8TH AVE S, ST PETERSBURG, FL 33711
			VICKY URBAN	CLOSED 12/10/2019	STRAIN OR INJURY BY JUMPING		KNEE	PROGRAM SPECIAL				\$0.00	\$3,138.12	
WCC	07/01/2019 - 06/30/2020	001-WC19A-78562 C00259628-01	MO	09/16/2019	Brandi Mitchell	RASH ON LEFT ARM.	DERMATITIS	04/02/2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3420 8TH AVE S, ST PETERSBURG, FL 33711
			NANCY KRIZEN	CLOSED 09/25/2019	MISCELLANEOUS CAUSES CUMULATIVE, NOC		LOWER ARM	RESCOURCE SPEC				\$0.00	\$0.00	
WCC	07/01/2019 - 06/30/2020	001-WC19A-78562 C00259628-02	MO	09/16/2019	Brandi Mitchell	RASH ON LEFT ARM.	DERMATITIS	04/02/2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3420 8TH AVE S, ST PETERSBURG, FL 33711
			NANCY KRIZEN	CLOSED 09/25/2019	MISCELLANEOUS CAUSES CUMULATIVE, NOC		LOWER ARM	RESCOURCE SPEC				\$0.00	\$0.00	
WCC	03/24/2019 - 06/30/2019	001-WC19A-68168 C00254212-01	MO	06/25/2019	Yvette Reeves	OFFICE IS BEING TREATED FOR FLEAS. EMPLOYEE DEVELOPED CELLULITIS FROM FLEA BITES.	DERMATITIS	04/06/2015	\$0.00	\$85.57	\$1,222.32	\$0.00	\$1,307.89	3420 8TH AVENUE S, ST PETERSBURG, FL 33711
			VICKY URBAN	CLOSED 07/02/2019	MISCELLANEOUS CAUSES OTHER MISCELLANEOUS, NOC		MULTIPLE LOWER EXTREMITIES	INSTRUCTOR				\$0.00	\$1,307.89	

\*Recoveries include deductibles, salvage, and subrogation

\*Coverage type LT: Lost Time Claim; MO: Medical Only Claim; EL: Employer's Liability Claim

Mar 15, 2023



Report as of: Mar 15, 2023

**ACCOUNT:**  
WORKNET PINELLAS, INCHUB International Midwest Ltd  
13805 58th St N Ste 2140 4830 W Kennedy Blvd Ste 850  
Clearwater, FL 337603716Tampa, FL 33609

**AGENCY:**

LOSS RUN DETAIL

LOB	Policy Period	Policy Number / Claim Number	Coverage Type / Claim Adjuster	Date of Loss / Status	Claimant Name / Claim Description	Accident Description	Nature of Injury / Body Part	Hire Date / Claimant Occupation	Paid Loss (Indemnity)	Paid Expenses	Paid Medical	Reserves / Recoveries*	Gross Incurred / Net Incurred	Risk Location
WCC	03/24/2019 - 06/30/2019	001-WC19A-68168 C00254430-01	MO	06/28/2019	Cheryl Francis	OFFICE IS BEING TREATED FOR INSECTS. EMPLOYEE DEVELOPED RASH	DERMATITIS	11/10/2014	\$0.00	\$25.10	\$358.74	\$0.00	\$383.84	13805 58TH ST N STE 2140, CLEARWATER, FL 33760
			SUSAN DALESSANDRO	07/12/2019	MISCELLANEOUS CAUSES OTHER MISCELLANEOUS, NOC		MULTIPLE BODY PARTS	PROGRAM SPECIAL				\$0.00	\$383.84	
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00225002-01	MO	05/10/2018	Brandi Mitchell	EMPLOYEE WAS SITTING AT HER DESK, GOT A STRONG SMELL ASPHALT & SHE GOT SICK.	ALL OTHER SPECIFIC INJURIES NOC	09/18/2015	\$0.00	\$7.91	\$113.05	\$0.00	\$120.96	3420 8TH AVENUE S, ST PETERSBURG, FL 33711
			NANCY KRIZEN	05/24/2018	MISCELLANEOUS CAUSES ABSORPTION, INGESTION OR INHA		INSUFFICIENT INFO TO IDENTIFY PART	RESOURCE SPECIAL				\$0.00	\$120.96	
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00225002-02	MO	05/10/2018	Brandi Mitchell	EMPLOYEE WAS SITTING AT HER DESK, GOT A STRONG SMELL ASPHALT & SHE GOT SICK.	ALL OTHER SPECIFIC INJURIES NOC	09/18/2015	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3420 8TH AVENUE S, ST PETERSBURG, FL 33711
			NANCY KRIZEN	05/24/2018	MISCELLANEOUS CAUSES ABSORPTION, INGESTION OR INHA		INSUFFICIENT INFO TO IDENTIFY PART	RESOURCE SPECIAL				\$0.00	\$0.00	
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00227605-01	MO	06/18/2018	Joellyn Chancey	EMPLOYEE WAS SITTING AT HER DESK WHEN SHE WAS STRUCK BY A CUSTOMER.	CONTUSION	05/31/2016	\$0.00	\$49.65	\$373.50	\$0.00	\$423.15	9215 N FLORIDA AVE, TAMPA, FL 33612
			NANCY KRIZEN	07/17/2018	STRUCK OR INJURED BY NOC		MOUTH	PROGRAM CORDINA				\$0.00	\$423.15	
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00228071-01	MO	06/22/2018	Jody Toner	TRIPPED OVER A CORD AND INJURED LEFT FOOT AND BACK	MULTIPLE INJURIES-PHYSICAL ONLY	06/27/2012	\$0.00	\$111.86	\$1,597.78	\$0.00	\$1,709.64	9350 BAY PLAZA BLVD STE 121, TAMPA, FL 33619
			VICKY URBAN	08/28/2018	FALL, SLIP OR TRIP INJURY NOC		MULTIPLE BODY PARTS	DIRECTOR OF SPE				\$0.00	\$1,709.64	

\*Recoveries include deductibles, salvage, and subrogation

\*Coverage type LT: Lost Time Claim; MO: Medical Only Claim; EL: Employer's Liability Claim

Mar 15, 2023





**ACCOUNT:** WORKNET PINELLAS, INCHUB International Midwest Ltd  
13805 58th St N Ste 2140 4830 W Kennedy Blvd Ste 850  
Clearwater, FL 337603716Tampa, FL 33609

LOSS RUN DETAIL

LOB	Policy Period	Policy Number / Claim Number	Coverage Type / Claim Adjuster	Date of Loss / Status	Claimant Name / Claim Description	Accident Description	Nature of Injury / Body Part	Hire Date / Claimant Occupation	Paid Loss (Indemnity)	Paid Expenses	Paid Medical	Reserves / Recoveries*	Gross Incurred / Net Incurred	Risk Location
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00242926-01	MO	01/22/2019 CLOSED	Jacob Polukoff	EMPLOYEE WAS MOVING BOXES IN THE STORAGE ROOM RANGING FROM 10-40 LBS AND WHILE MOVING EMPLOYEE FELT SHARP PAIN IN HIS BACK.	STRAIN	02/06/2017	\$0.00	\$34.19	\$488.51	\$0.00	\$522.70	13805 58TH ST N STE 2140, CLEARWATER, FL 33760
			BRIE PATRICK	03/06/2019	STRAIN OR INJURY BY LIFTING		LOW BACK AREA(INC:LUMBAR&LUMBO-SACR	RECRUITER				\$0.00	\$522.70	
WCC	03/24/2018 - 03/23/2019	001-WC18A-68168 C00243855-01	MO	02/05/2019 CLOSED	Brandi Mitchell	EMPLOYEE WAS ENTERING THE BUILDING THIS MORNING, TRIPPED ON A GRATE AND TWISTED HER LEFT ANKLE.	STRAIN	09/08/2015	\$0.00	\$45.78	\$654.17	\$0.00	\$699.95	3420 8TH AVENUE S, ST PETERSBURG, FL 33711
			BRIE PATRICK	02/28/2019	STRAIN OR INJURY BY TWISTING		ANKLE	RESOURCE SPECIA				\$0.00	\$699.95	

\*Recoveries include deductibles, salvage, and subrogation

\*Coverage type LT: Lost Time Claim; MO: Medical Only Claim; EL: Employer's Liability Claim

Mar 15, 2023

## **Claims and Losses History**

Account Name:

**WORKNET PINELLAS INC.**

Account Number:

**1521701996**

**Search Request Criteria: ALL**

**Report Run Date:** 03/17/2023

**Loss Evaluation Date:** 03/16/2023



The Hanover Insurance Company  
440 Lincoln Street, Worcester, MA 01653

hanover.com  
The Agency Place (TAP)—<https://tap.hanover.com>

### Monoline Liability

	EFFECTIVE	EXPIRATION	CLAIMS	PAID	OUTSTANDING	ALAE PAID	ALAE RESERVE	RECOVERIES	INCURRED +ALAE
LHC H302705 02	07/01/2022	07/01/2023	0	\$0	\$0	\$0	\$0	\$0	\$0
LHC H302705 01	07/01/2021	07/01/2022	1	\$0	\$0	\$0	\$0	\$0	\$0
LHC H302705 00	07/01/2020	07/01/2021	2	\$0	\$0	\$3,824	-\$28	\$0	\$3,796
<b>TOTAL</b>			3	\$0	\$0	\$3,824	-\$28	\$0	\$3,796
<b>ACCOUNT TOTAL</b>			3	\$0	\$0	\$3,824	-\$28	\$0	\$3,796



Claims Detail

Account Name: WORKNET PINELLAS INC.  
Account Number: 1521701996

Monoline Liability

POLICY #	CLAIMS #	EFFECTIVE	EXPIRATION	DATE OF LOSS	DATE REPORTED	OUTSTANDING	PAID	ALAE RESERVE	ALAE PAID	RECOVERIES	INCURRED + ALAE	SUBROGATION	STATUS
LHC H302705 01	85-00026617	07/01/2021	07/01/2022	11/03/2021	11/03/2021	\$0	\$0	\$0	\$0	\$0	\$0	\$0	closed

Loss Explanation: Wrongful Termination

Claimant: Michelle Binette

Loss Loc: 13805 58th St. N., Ste 2-140, Clearwater, FL-33760, United States

Desc: Whistle-Blower Complaint. See attached complaint from the law offices of Nicholas E. Karatinos, ESQ

Monoline Liability

EFFECTIVE	EXPIRATION	CLAIMS	PAID	OUTSTANDING	ALAE PAID	ALAE RESERVE	RECOVERIES	INCURRED
07/01/2021	07/01/2022	1	\$0	\$0	\$0	\$0	\$0	\$0

Report Run Date: 03/17/2023

Loss Evaluation Date: 03/16/2023

page 3 of 4

The information contained in the Loss Run Report may not be current and is provided without The Hanover's acceptance of any coverage obligation for a claim. The information is not intended in any manner as confirmation of The Hanover's acceptance of coverage for a claim. The Outstanding Reserves or ALAE Reserves amounts in the Loss Run Report are not to be construed as The Hanover's acceptance of coverage for a claim nor is the amount intended as a determination of The Hanover's coverage obligation for the claim. ALAE Reserves are not included in Outstanding amounts but are included in Incurred + ALAE amounts. The Recoveries figure represents the amount of dollars recovered through salvage, subrogation and/or deductible on a policy. Please contact your Hanover Underwriter for information on Open Claims.



Claims Detail

Account Name: WORKNET PINELLAS INC.  
Account Number: 1521701996

Monoline Liability

POLICY #	CLAIMS #	EFFECTIVE	EXPIRATION	DATE OF LOSS	DATE REPORTED	OUTSTANDING	PAID	ALAE RESERVE	ALAE PAID	RECOVERIES	INCURRED + ALAE	SUBROGATION	STATUS
LHC H302705 00	19-00711237	07/01/2020	07/01/2021	06/19/2020	07/21/2020	\$0	\$0	\$0	\$1,212	\$0	\$1,212	\$0	closed

Loss Explanation: Wrongful Termination

Claimant: Devin Hicks

Loss Loc: , Unknown, FL-33760, United States

Desc: Plaintiff: Devin Hicks

Atty: Shannon A. Ligon, Esq.

Complaint: Atty letter rec'd asking for records, recorded statements, names and addresses of each insurer, etc.

LHC H302705 00	19-00783265	07/01/2020	07/01/2021	09/16/2020	11/30/2020	\$0	\$0	-\$28	\$2,612	\$0	\$2,584	\$0	closed
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Loss Explanation: Wrongful Termination

Claimant: Ahmed Amer

Loss Loc: 13805 58th St. N., Ste 2-140, Clearwater, FL-33760, United States

Desc: Plaintiff: Ahmed Amer

Atty: EEOC

Complaint: Disabled Veteran subjected to retaliation and discrimination by the Director of Business Services..

Monoline Liability

	EFFECTIVE	EXPIRATION	CLAIMS	PAID	OUTSTANDING	ALAE PAID	ALAE RESERVE	RECOVERIES	INCURRED
	07/01/2020	07/01/2021	2	\$0	\$0	\$3,824	\$2,612	\$0	\$3,796
ACCOUNT TOTAL FOR MONOLINE LIABILITY			3	\$0	\$0	\$3,824	-\$28	\$0	\$3,796

Report Run Date: 03/17/2023

Loss Evaluation Date: 03/16/2023

page 4 of 4

The information contained in the Loss Run Report may not be current and is provided without The Hanover's acceptance of any coverage obligation for a claim. The information is not intended in any manner as confirmation of The Hanover's acceptance of coverage for a claim. The Outstanding Reserves or ALAE Reserves amounts in the Loss Run Report are not to be construed as The Hanover's acceptance of coverage for a claim nor is the amount intended as a determination of The Hanover's coverage obligation for the claim. ALAE Reserves are not included in Outstanding amounts but are included in Incurred + ALAE amounts. The Recoveries figure represents the amount of dollars recovered through salvage, subrogation and/or deductible on a policy. Please contact your Hanover Underwriter for information on Open Claims.

## WC LOSS RUN REPORT

### AmTrust North America

WorkNet Pinellas, Inc.

Claim No	Claimant	Department				Loss Location				
Converted #	Class Cd	DOL	Nature	Status	Part Injured					
Policy Number	Juris St	First Aware	Employee Lag	Category	Cause					
Pol. Eff Date	Insured	Date Rcvd	Reporting Lag	Adjuster	Loss Description		Indem	Medical	LAE	Total
3648978	1	Schmick Maryjo			1919 Connecuit Ave NW Washington DC, 20009					
0	8864	03/26/2023	Inflammation	C	Foot	<b>Reserves</b>	0	0	0	0
TWC4135982	FL	03/26/2023	0 Days	MED	Fall or Slip - On Same Level	<b>Payments</b>	0	0	30	30
07/01/2022	WorkNet Pinellas, Inc.	04/06/2023	11 Days	37489	EE was walking and EE tripped on sidewalk injuring right foot. Injury is causing pain and getting worse	<b>Recoveries</b>	0	0	0	0
						<b>Incurred</b>	0	0	30	30

WC LOSS RUN REPORT  
AmTrust North America

WorkNet Pinellas, Inc.

Claim No	Claimant	Department			Loss Location				
Converted #	Class Cd	DOL	Nature	Status	Part Injured				
Policy Number	Juris St	First Aware	Employee Lag	Category	Cause				
Pol. Eff Date	Insured	Date Rcvd	Reporting Lag	Adjuster	Loss Description	Indem	Medical	LAE	Total

Policy Number TWC4135982

Group Totals

	LT	Med	Total	Reserves	0	0	0	0
Open	0	0	0	Payments	0	0	30	30
Closed	0	1	1	Recoveries	0	0	0	0
				Incurred	0	0	30	30

## WC LOSS RUN REPORT

### AmTrust North America

WorkNet Pinellas, Inc.

Claim No	Claimant	Department			Loss Location				
Converted #	Class Cd	DOL	Nature	Status	Part Injured				
Policy Number	Juris St	First Aware	Employee Lag	Category	Cause				
Pol. Eff Date	Insured	Date Rcvd	Reporting Lag	Adjuster	Loss Description	Indem	Medical	LAE	Total
0	NO CLAIMANTS								
TWC4277083			0 Days			Reserves	0	0	0
07/01/2023	WorkNet Pinellas, Inc.		0 Days		NO LOSSES	Payments	0	0	0
						Recoveries	0	0	0
						Incurred	0	0	0



WC LOSS RUN REPORT  
AmTrust North America

WorkNet Pinellas, Inc.

Claim No	Claimant	Department			Loss Location				
Converted #	Class Cd	DOL	Nature	Status	Part Injured				
Policy Number	Juris St	First Aware	Employee Lag	Category	Cause				
Pol. Eff Date	Insured	Date Rcvd	Reporting Lag	Adjuster	Loss Description	Indem	Medical	LAE	Total

TWC4277083

Group Totals

	LT	Med	Total	Reserves	0	0	0	0
Open	0	0	0	Payments	0	0	0	0
Closed	0	0	0	Recoveries	0	0	0	0
				Incurred	0	0	0	0

## WC LOSS RUN REPORT

### AmTrust North America

WorkNet Pinellas, Inc.

### Report Totals

Indem Medical LAE Total

	LT	Med	Total	Reserves
Totals for Open	0	0	0	Payments
				Recoveries
				Incurred

	LT	Med	Total	Reserves	0	0	0	0
Totals for Closed	0	1	1	Payments	0	0	30	30
				Recoveries	0	0	0	0
				Incurred	0	0	30	30

	LT	Med	Total	Reserves	0	0	0	0
Report Totals	0	1	1	Payments	0	0	30	30
				Recoveries	0	0	0	0
				Incurred	0	0	30	30



## INFORMATION ITEM 16

### Unrestricted Cash

As of June 30, 2023, CareerSource Pinellas had almost \$856,000 of unrestricted funds available deposited in the following accounts:

Valley National Bank	Balance
Unrestricted Checking	169,762
Unrestricted Money Market	525,061
Operating Money Market	181,249
<b>Total</b>	<b>\$ 876,072</b>

**Unrestricted Checking:** Funds accumulated from unrestricted activities, e.g., Ticket to Work revenue, Tobacco Free Florida referral revenue, lobbying expenses, etc.

**Unrestricted Money Market:** Funds remaining from proceeds of sale of Science Center after payment of disallowed costs to U.S. Department of Labor.

**Operating Money Market:** Represents funds remaining from Capital Improvement Fund from the Science Center. The account was designated to track cash value for capital improvements to buildings as they became necessary. At the January 15, 2020, Board meeting, the Board approved the release of the remaining \$176,000 in the Capital Improvement Fund to unrestricted. The increase represents interest earned.

With the potential consolidation of CareerSource Pinellas with CareerSource Tampa Bay, it is important that any unrestricted cash attributable to Pinellas County remain available only for Pinellas County purposes and not commingled with cash of the consolidated entity. It also should be noted that any recovery of funds (up to \$1 Million) from the litigation with Chubb would be unrestricted as well.



## **INFORMATION ITEM 17**

### **Subrecipient Monitoring**

#### **For the Period July 1, 2022 – June 30, 2023**

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) which was shared at the previous Audit Committee meeting.

#### **Pinellas Education Foundation**

Period Reviewed – As of February 24, 2023, for the program year ending June 30, 2023.

Contracted Amount - \$525,000

#### **Findings**

- A formal corrective action plan was not prepared and submitted to CareerSource Pinellas for review and approval.
- A certified cost allocation plan was not provided for inspection. This is a repeat comment. Recommend PEF elect a de minimis rate of 10% for indirect cost allocation.
- One employee’s time was charged to the project erroneously.
- Benefit costs not properly reduced for one employee.

#### **Observations**

- Monthly Youth Services Reports should be supported by client data and counts to substantiate the information presented. The participant lists did not indicate the total number of individuals earning a credential or measurable skills gain.

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.

CAREERSOURCE PINELLAS

PROGRAM YEAR 2022-2023

FINANCIAL & PROGRAMMATIC MONITORING  
AS OF FEBRUARY 24, 2023

SUBRECIPIENT MONITORING REPORT

REPORT #4



Taylor | Hall | Miller | Parker | P.A.



Independent Accountants' Report  
On Applying Agreed-Upon Procedures

To the Board of Directors and Management of CareerSource Pinellas:

We have performed the procedures enumerated below in the attached sections on the fiscal and programmatic records of CareerSource Pinellas (CareerSource) as of February 24, 2023, for the program year ending June 30, 2023. CareerSource's management is responsible for the fiscal and programmatic records.

CareerSource has agreed to and acknowledged that the procedures performed are appropriate to meet the intended purpose of conducting fiscal and programmatic monitoring. This report may not be suitable for any other purpose. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

For reporting purposes, findings and observations are as follows:

Findings—These items reflect non-compliance with governing regulations, internal policies, or contractual requirements and may illustrate questionable costs and/or problematic deficiencies in internal controls. These items can also indicate ineffective or improper procedures, systems, and/or records maintenance.

Observations—These items may be proactive in nature and highlight specific situations where particular changes may enhance customer service and program outcomes, strengthen internal controls, or improve financial information and documentation.

The procedures and associated findings and observations are detailed in the following sections:

- I. Subrecipient Financial – Pinellas County Education Foundation, Inc.

We were engaged by CareerSource to perform this agreed-upon procedures engagement and conducted our engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants. We were not engaged to and did not conduct an examination or review engagement, the objective of which would be the expression of an opinion or conclusion, respectively, on the fiscal and programmatic records of CareerSource. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

We are required to be independent of CareerSource and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our agreed-upon procedures engagement.

*Taylor Hall Miller Parker, P.A.*

March 1, 2023

I. Subrecipient Financial – Pinellas County Education Foundation, Inc.

*Subrecipient Audit Review*

1. We reviewed the following audit reports submitted by CareerSource's subrecipients:

- Pinellas County Education Foundation, Inc., and Subsidiary – June 30, 2022

There were no findings or observations identified as a result of applying the procedures above to the sample selected.

*Subrecipient Payment Requests*

1. We obtained a list of subrecipient payments for PY 2022-2023 and, based on this list, randomly selected the payment request submitted by Pinellas County Education Foundation Inc. (PEF) for the month of December 2022, and performed the following:

- a. Confirmed the mathematical accuracy.
- b. Traced line-item costs to the subrecipient's general ledger.
- c. For a random sample of payroll disbursements, obtained the supporting detail by employee salary and related benefits to determine whether the costs were allowable and properly allocated, and whether payroll allocation percentages recalculated and traced to supporting documentation and PARs (Personnel Activity Reports).
- d. For a random sample of operating disbursements, determined whether the vendor invoice was present and supported by proof of payment (copies of checks), and the costs were allowable, properly allocated and classified, and traced to the general ledger.
- e. For a random sample of training-related disbursements, traced the amount billed to the supporting documentation and determined whether:
  1. the costs were supported by appropriate documentation, proof of payment, and receipt by the student;
  2. the student was enrolled as WIOA Youth with a corresponding activity open in EF; and
  3. costs were properly classified as WIOA Out-of-School or In-School.
- f. Determined whether costs were properly allocated and classified in accordance with the subrecipient's cost allocation plan.
- g. Determined whether indirect costs were properly billed in accordance with the subrecipient's approved indirect rate.



- h. Traced the payment request to CareerSource's general ledger.
- i. Determined if the contract was posted on CareerSource's website.
- j. Determined if a risk assessment had been completed by CareerSource.
- k. Determine if a corrective action plan had been submitted for the prior year's internal monitoring conducted.

Findings:

- 1. There were no findings identified as a result of applying the procedures above to the payment request, except for:

*Corrective Action Plan*

- A formal corrective action plan was not prepared and submitted to CareerSource for review and approval.

*Cost Allocation*

- A certified cost allocation plan was not provided for inspection. This issue was also noted during the prior monitoring.

*Personnel Costs*

- For S. Hillstock, the three pay periods billed 50% to this contract included days worked in November 2022; however, per correspondence with PEF, this employee did not work on this contract until December 2022 and, as a result, payroll costs were overbilled for this employee. Based on the timesheet/PAR provided for December 2022, which was missing approvals, only 64 hours related to these three pay periods should have been billed; this appears to have resulted in an overbilling of \$778.00 in gross pay plus applicable payroll taxes.
- For K. Robillard, there were three pay dates in December 2022 and all three pay periods had benefit deductions from pay; however, the benefit costs for the month were reduced by employee deductions for only two of the pay periods.

Recommendation:

CareerSource and PEF should review the invoices submitted and make adjustments as necessary to ensure that amounts reimbursed are supported by proper documentation, only allowable and allocable costs related to this contract are reimbursed, and appropriate credits are issued or paid to CareerSource. Furthermore, PEF should document and certify its cost allocation plan and submit formal corrective action plans to CareerSource for monitoring reports. In the future, reimbursement should be requested only for allowable costs that are both incurred and paid. Additionally, CareerSource should periodically request supporting documentation for a small sample of expenditures to validate amounts billed and to support action taken related to the risk assessment.

## *Programmatic Review*

1. We selected the corresponding Monthly Youth Services Report for December 2022 submitted by Pinellas County Education Foundation Inc. and inspected the report and supporting documentation provided to determine whether performance outcomes were properly substantiated and calculated.

As a result of applying the procedures to the sample selected, we observed the following that should be addressed to improve performance information:

### Observations:

1. The participant detail provided to support the customer counts recorded on the Monthly Youth Services Reports reviewed contained information related only to cases that were closed. The participant lists did not indicate the total number of individuals earning a credential or skills gain each month, only those whose cases were exited. Additionally, the various attainment and completion rates listed on the reports are based on the counts of Active Youth and Active Youth in Training, but these total counts were not supported by customer data.

We also noted that for some of the attainment rates listed, the results were directly entered into the Excel spreadsheet rather than formula-based, and there were no explanations as to how the rates were calculated. Additionally, we noted a few instances where it appeared that Excel formulas were overwritten with manually entered information.

As such, we were unable to verify total monthly counts and various attainment rates related to the performance goals listed in the contract.

### Recommendation:

Each Monthly Youth Services Report submitted should be supported by customer data and counts to substantiate the information presented. Additionally, the Excel document used should be reviewed by the subrecipient and the formulas updated as appropriate to ensure that attainment rates are properly calculated and explanations are provided for those measures that are not formula-based; for clarity, attainment rates that are cumulative in nature should be identified as such. CareerSource staff should ensure that the report and related supporting documents are carefully reviewed when submitted each month.

## PY'2023 – 2024 Committee Assignments

### Executive Committee

- |   |  |
|---|--|
| 1. <b>Scott Thomas (Board Chair)</b>      | 5. Kenneth Williams (Secretary)                  |
| 2. Elizabeth Siplin (Chair-Elect)         | 6. Jack Geller (Compensation Chair)              |
| 3. Commissioner René Flowers (Vice-Chair) | 7. Dr. Rebecca Sarlo (Workforce Solutions Chair) |
| 4. Barclay Harless (Treasurer)            | 8. Mark Hunt (One-Stop Chair)                    |

### Finance Committee

1. **Barclay Harless (Chair)**
2. David Fetkenher
3. Jack Geller
4. Scott Thomas
5. Dr. Rebecca Sarlo
6. Esther Matthews

### Audit Committee

1. **Barclay Harless (Chair)**
2. Scott Thomas
3. Comm. René Flowers
4. David Fetkenher
5. County Appointee (TBD)
6. County Appointee (TBD)

### Compensation Committee

1. **Jack Geller (Chair)**
2. Barclay Harless
3. Scott Thomas
4. Candida Duff
5. Bart Diebold
6. Esther Matthews
7. Nikisha Lezama

### One-Stop Committee

- |                             |  |
|-----------------------------|--|
| 1. <b>Mark Hunt (Chair)</b> | 7. Michael Jalazo                      |
| 2. Dr. Rebecca Sarlo        | 8. Senator Nick DiCeglie               |
| 3. John Howell              | 9. Tony Manatine (non-board member)    |
| 4. Candida Duff             | 10. Jody Armstrong (non-board member)  |
| 5. Pattye Sawyer            | 11. Ryan Becker (non-board member)     |
| 6. Zachary White            | 12. Sandy Traynor (non-board member)   |
|                             | 13. Tiffany Nozicka (non-board member) |

### Workforce Solutions Committee

- |                                     |   |
|-------------------------------------|---|
| 1. <b>Dr. Rebecca Sarlo (Chair)</b> | 10. Esther Matthews                     |
| 2. Belinthia Berry                  | 11. Elizabeth Siplin                    |
| 3. Michael Jalazo                   | 12. Shawn McDonnell                     |
| 4. Mark Hunt                        | 13. Ben Friedman                        |
| 5. Ivonne Alvarez                   | 14. Jene Skipper (non-board member)     |
| 6. Kevin Knutson                    | 15. Anthony Chan (non-board member)     |
| 7. Candida Duff                     | 16. Eric McClendon (non-board member)   |
| 8. Bart Diebold                     | 17. David Hill (non-board member)       |
| 9. Glenn Willocks                   | 18. Denise Sanderson (non-board member) |

### Ad Hoc CEO/Counsel Selection Committee

- |                              |                  |
|------------------------------|------------------|
| 1. Barclay Harless           | 3. Kevin Knutson |
| 2. Commissioner René Flowers | 4. Scott Thomas  |
|                              | 5. Dawn Peters   |

### Ad Hoc Nominating Committee

1. Scott Thomas
2. Commissioner René Flowers
3. Elizabeth Siplin
4. Kevin Knutson
5. TBD

### Quorums: 40% plus 1

Board of Directors  
 Executive Committee  
 Finance Committee  
 Ad Hoc CEO/Counsel Selection Committee



## **INFORMATION ITEM 19**

### **Updated Bylaws**

The CareerSource Pinellas Board of Directors approved changes to the organization's bylaws on March 16, 2022, subject to approval by the Pinellas County Board of County Commissioners (BOCC). The BOCC approved the bylaws with a couple of modifications at its April 26, 2022, meeting. The bylaws with the modifications highlighted and the minutes of the April 26, 2022, BOCC meeting are attached for your review.

# **Pinellas County**

*315 Court Street  
Clearwater, FL 33756*



## **Minutes - Final**

**Tuesday, April 26, 2022**

**2:00 P.M.**

**Hybrid In-Person and Virtual Regular Meeting  
Public Hearings at 6:00 P.M.**

## **Board of County Commissioners**

*Charlie Justice, Chairman  
Janet C. Long, Vice-Chair  
Dave Eggers  
Rene Flowers  
Pat Gerard  
Kathleen Peters  
Karen Williams Seel*

**ROLL CALL - 2:04 P.M.**

**Present:** 7 - Chairman Charlie Justice, Vice-Chair Janet C. Long, Dave Eggers, Rene Flowers, Pat Gerard, Kathleen Peters, and Karen Williams Seel

**Others Present:** Barry A. Burton, County Administrator; Jewel White, County Attorney; Derelynn Revie, Board Records Manager; and Shirley Westfall, Board Reporter, Deputy Clerk

**INVOCATION by Rabbi Jenn Mangold, Temple Beth-El, St. Petersburg.****PLEDGE OF ALLEGIANCE****PRESENTATIONS AND AWARDS**

1. 2021 Procurement in Excellence Award:
  - Merry Celeste, Division Director, Purchasing and Risk Management
  - Amanda Richardson, Manager of Purchasing Operations, Purchasing
  - William Lawrentz, Manager of Purchasing Support, Purchasing

Chairman Justice invited Ms. Celeste and her staff to the podium and read a proclamation recognizing the staff's diligent work and presented the 2021 Procurement in Excellence Award; whereupon, Ms. Celeste thanked staff and expressed appreciation for the proclamation. Mr. Burton extended his thanks to the Purchasing and Risk Department for their efforts.

2. Earth Day & Arbor Day Proclamation:  
Stormwater and Vegetation Division, Public Works
  - Carolyn Cheatham Rhodes, Environmental Program Manager
  - Drew McLean, Operations Manager

Chairman Justice invited Ms. Cheatham Rhodes and Mr. McLean to the podium and read a proclamation recognizing April 22 as Earth Day and April 29 as Arbor Day. He urged citizens to join in supporting the County's Urban Forestry and Natural Resource programs; whereupon, Ms. Cheatham Rhodes thanked the Board and invited citizens to the Pinellas County Arbor Day celebration.

3. Public Service Recognition Week Proclamation:
  - Lisa Arispe, Chair, Employees' Advisory Council

Chairman Justice invited Ms. Arispe to the podium and read a proclamation recognizing the week of May 1 through 7 as Public Service Recognition Week and he thanked all County employees for their hard work; whereupon, Ms. Arispe related that she is honored to represent county employees and work with the Commissioners and Administrators.

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## CITIZENS TO BE HEARD

### 4. Citizens To Be Heard - Public Comment.

Todd Pressman, St. Petersburg  
David Ballard Geddis, Jr., Palm Harbor  
Stacy Geier, Largo  
David Happe, Tarpon Springs  
Gail Conroy, Redington Shores  
Mack Jackson, Largo  
Ryan Sullivan, Largo  
Greg Pound, Largo  
Daniel Amend, Seminole  
Craig Murtha, Largo

In response to a query by Mr. Pressman regarding an ordinance regulating mobile home accessories, members requested that staff come back with information with respect to time parameters and potential language.

Responding to Ms. Conroy's stated concerns regarding the mass death of bees, Commissioner Peters related that staff is working to qualify Pinellas County as a Bee Friendly County. Chairman Justice indicated that the County, along with other local governments, had formed a taskforce to aid in the safe use of pesticides.

## CONSENT AGENDA - Items 5 through 19

**A motion was made by Vice-Chair Long, seconded by Commissioner Flowers, to approve the Consent Agenda. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

## CLERK OF THE CIRCUIT COURT AND COMPTROLLER

### 5. Minutes of the regular meeting held February 8, 2022.

**The item was approved as part of the Consent Agenda.**

### 6. Vouchers and bills paid from March 20 through 26, 2022.

Period March 20 - 26, 2022

Accounts Payable - \$17,404,226.74

Payroll - None

**The item was approved as part of the Consent Agenda.**

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Reports received for filing:

7. Dock Fee Report for the month of March 2022.

**The item was approved as part of the Consent Agenda.**

8. Quarterly Report of Routine Dock & Dredge/Fill Permits issued from January 1 through March 31, 2022.

**The item was approved as part of the Consent Agenda.**

Miscellaneous items received for filing:

9. Oath of Office and Public Official Bond for Pinellas Suncoast Fire & Rescue District Commissioner Elizabeth McKenna.

**The item was approved as part of the Consent Agenda.**

10. City of Dunedin Ordinance 21-32 adopted March 24, 2022, annexing certain real property.

**The item was approved as part of the Consent Agenda.**

11. Juvenile Welfare Board Certified Annual Financial Statements dated March 30, 2022, and Annual Comprehensive Financial Report for the year ended September 30, 2021.

**The item was approved as part of the Consent Agenda.**

12. Forward Pinellas Notice of Public Hearing for Amendment of the Countywide Plan Map, held on April 13, 2022.

**The item was approved as part of the Consent Agenda.**

## COUNTY ADMINISTRATOR DEPARTMENTS

### County Administrator

13. Receipt and file report of non-procurement items delegated to the County Administrator for the period ending March 25, 2022.

**The item was approved as part of the Consent Agenda.**



- 
14. Receipt and file report of purchasing items delegated to the County Administrator for the quarter ending March 31, 2022.

**The item was approved as part of the Consent Agenda.**

#### Public Works

15. Joint Participation Agreement with the Florida Department of Transportation accepting funding for purchase of traffic control, detection, and communication equipment for the State Road 60/Gulf to Bay Boulevard from Missouri Avenue to Dr. Kiran C. Patel Boulevard.

(County Project No. 004974A) Agreement approved in the amount of \$1,800,000.00. Equipment to be purchased must be identified and approved by October 1, 2022 and project to be completed no later than December 31, 2023. FDOT will reimburse the County up to \$1,800,000.00 for the purchase of authorized equipment as set forth in the Agreement.

**The item was approved as part of the Consent Agenda.**

#### COUNTY ATTORNEY

16. Receipt and file report of civil lawsuits filed against Pinellas County as delegated to the County Attorney.

**The item was approved as part of the Consent Agenda.**

#### AUTHORITIES, BOARDS, CONSTITUTIONAL OFFICERS AND COUNCILS

##### Business Technology Services

17. Award of bid with CDW Government LLC for NetApp Storage Systems.

Contract No. 21-0686-B in the estimated annual expenditure of \$1,545,000.00 for a 36 month total of \$4,635,000.00 awarded on the basis of being the only responsive and responsible bidder due to market conditions. The Contract replaces 178-0127-S with ExtenSys, Inc.

**The item was approved as part of the Consent Agenda.**

##### Sheriff's Office

18. Receipt and file report of Sheriff's Office grants received and service contracts for the quarter ending March 31, 2022.

**The item was approved as part of the Consent Agenda.**

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- 
19. Receipt and file report of the Law Enforcement Trust Fund for the quarter ending March 31, 2022.

The item was approved as part of the Consent Agenda.

## REGULAR AGENDA

ITEMS FOR DISCUSSION FROM THE CONSENT AGENDA - None.

## COUNTY ADMINISTRATOR DEPARTMENTS

### Airport

20. Award of bid to DS Jordan Construction Inc. for the St. Pete-Clearwater International Airport new freight elevator in terminal.

Contract No. 22-0115-CP (PID No. 004352A) approved in the amount not-to-exceed \$381,731.50 to be completed within 180 consecutive calendar days from issuance of notice to proceed on the basis of being the only responsive, responsible bid received meeting specifications.

**A motion was made by Commissioner Seel, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

21. Public Transportation Grant Agreement with the Florida Department of Transportation for the design and construction of paving the "Strawberry" economy parking lot at the St. Pete-Clearwater International Airport.

Agreement approved for Phase I of the project. Total costs equal \$550,000.00, with the Grant funding \$275,000.00 and St. Pete-Clearwater International Airport funding the other \$275,000.00. Staff expects an amendment to the agreement next year to fund the remainder of the project. The Grant Agreement expires June 30, 2025.

**A motion was made by Vice-Chair Long, seconded by Commissioner Flowers, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

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- 22.** Public Transportation Grant Agreement with the Florida Department of Transportation for the design and environmental work associated with the terminal building expansion at the St. Pete- Clearwater International Airport.

Agreement approved in the first grant amount of \$1,976,040.00. A total of \$9,976,040.00 to be funded to St. Pete-Clearwater International Airport over the next five years. The Grant Agreement expires June 30, 2026.

**A motion was made by Commissioner Flowers, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

### Economic Development

- 23.** Third Amendment to Economic Development Funding Agreement with STAR-TEC Enterprises to provide economic development incubation and acceleration services.

Third amendment approved. Total amount of \$218,750.00, payable in quarterly installments. Agreement term will begin on July 1, 2022 and will remain in effect until September 30, 2023. The Agreement will automatically terminate upon the execution of a Master Lease and Operating Agreement for the Tampa Bay Innovation Center Business Incubator by Pinellas County and STAR-TEC, if executed prior to September 20, 2023.

Mr. Burton indicated that the amendment extends the term of the Agreement to align with completion of the Tampa Bay Innovation Center.

**A motion was made by Commissioner Flowers, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

### Human Services

- 24.** Agreement with Operation PAR for contracted substance use services for the Pinellas County Health Program.

Agreement approved allocating annual funding in an amount not-to-exceed \$1,021,750.00, comprised of a grant award from the Health Resources and Services Administration (\$547,750.00), funding from the Low Income Pool Program (\$270,000.00), and Human Services Department General Fund (\$204,000.00), through February 28, 2023. Authority delegated to the County Administrator for agreement renewals and additional funding added to the Agreement.

**A motion was made by Vice-Chair Long, seconded by Commissioner Flowers, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

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- 25.** Subrecipient Agreement with WestCare Gulfcoast-Florida, Inc. for the Fiscal Year 2021 Family Drug Court Grant program.

Agreement approved. WestCare to receive funding in the amount not-to-exceed \$966,944.00 over three years. The County is the recipient of a three-year grant award from the United States Department of Justice, Office of Justice Programs, Office of Juvenile Justice and Delinquency Prevention (Award No. 15PJDP-21-GG-04515-COAP), which requires an in-kind match totaling approximately \$336,546.00 and will be contributed by the Sixth Judicial Circuit and WestCare Gulfcoast-Florida, Inc.

Commissioner Flowers expressed appreciation to Senator Darryl Rouson for his work related to these types of programs.

**A motion was made by Vice-Chair Long, seconded by Commissioner Flowers, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

#### Public Works

- 26.** Local Agency Program Agreement with the Florida Department of Transportation and associated authorizing Resolution for construction of Starkey Road sidewalk from State Road 688/Ulmerton Road to East Bay Drive.

Resolution No. 22-30 adopted approving the agreement (FDOT Financial Project No. 437736 2 58/68 01, County PID No. 004229A) providing up to \$1,899,822.00 in federal grant funds for construction and construction engineering inspection services.

**A motion was made by Vice-Chair Long, seconded by Commissioner Gerard, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

- 27.** Road Deed Transfer Interlocal Agreement with the City of Pinellas Park for the transfer of specific roadway deeds.

Agreement approved granting transfer of jurisdiction and associated maintenance responsibilities for certain deeds of road segments. Specific deeds to be transferred to the City by the County and to the County by the City are listed in Exhibits A and B, respectively, as part of the supporting documents.

**A motion was made by Commissioner Eggers, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

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## AUTHORITIES, BOARDS, CONSTITUTIONAL OFFICERS AND COUNCILS

### CareerSource Pinellas

#### 28. Revisions to the WorkNet Pinellas, Inc. d/b/a CareerSource Pinellas By-Laws.

Revisions approved.

Attorney White noted that her staff is recommending two revisions to the By-Laws. She stated that a sentence providing for the staggered terms of two years had been struck from Article IV, Section 1, Paragraph A; and that staff believes it is an inadvertent striking of language and is therefore recommending that the sentence not be deleted.

Chief Assistant County Attorney Don Crowell indicated that the second recommendation is to add the phrase "for officers other than the Chair" to the third sentence in Article V, Section 3, after the phrase "after two consecutive terms", noting that the Chair is restricted to two terms under State law.

Commissioner Eggers requested that CareerSource provide annual reviews to the BCC, and Attorney Jewel provided input.

**A motion was made by Commissioner Flowers, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

## COUNTY ATTORNEY

#### 29. Proposed initiation of litigation in the case of Curtis Stowe v. Chalet Capri Condominium Association, Inc.; HUD Case No. 04-22-8869-8; PC Case No. 22-009 - alleged housing discrimination.

Initiation of litigation approved.

**A motion was made by Commissioner Gerard, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

#### 30. County Attorney Reports. - None.

## COUNTY ADMINISTRATOR

#### 31. County Administrator Reports. - None.

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## COUNTY COMMISSION

- 32.** County Commission New Business: Pertinent and Timely Committee/Board Updates, Policy Considerations, Administrative/Procedural Considerations, and other New Business:
- Approval of CareerSource Legal Counsel (Commissioner Flowers)
  - Bridge Illumination Resolutions (Commissioner Justice)

### Bob Graham Sunshine Skyway Bridge

Resolution No. 22-31 approved supporting the Florida Department of Transportation lighting of the Skyway Bridge in recognition of the Tampa Bay Lighting during May 9 - 16, 2022.

Resolution No. 22-32 approved supporting the Florida Department of Transportation lighting of the Skyway Bridge in recognition of Paint the Town Blue honoring National Police Week and Peace Officers Memorial Day during May 11-17, 2022.

**A motion was made by Commissioner Eggers, seconded by Commissioner Flowers, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

### Senate Bill 524

Attorney White related that SB 524 has recently been signed into law by the Governor.

Commissioner Flowers noted that the bill categorizes counties as to those with term limits and a charter versus those counties who do not have term limits and a charter; that in her opinion, the bill singles out Pinellas County specifically, as it affects no other Florida county; and that she supports the County Attorney in representing the Board, should the members approve litigation in the matter.

Commissioner Peters stated her concerns, indicating that a conflict of interest may be involved for the affected commissioners; that the issue may affect the governing body, but does not appear to affect ongoing County business; and that she questions whether litigation by the County is the best use of its resources.

Lengthy discussion ensued regarding the principle, legality, and ethical process of the bill as well as the merits of any pending litigation.

**A motion was made by Commissioner Flowers, seconded by Commissioner Long, that the Board authorize the County Attorney to challenge the validity of SB 524 as it pertains specifically to Pinellas County for purposes of single member districts, directing the County Attorney's Office to file suit with any cause of action that they deem legally appropriate. The motion carried by the following vote:**

**Aye:** 4 - Chairman Justice, Vice-Chair Long, Commissioner Flowers, and Commissioner Gerard  
**Nay:** 2 - Commissioner Eggers, and Commissioner Peters  
**Abstain:** 1 - Commissioner Seel

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### CareerSource

Selection of Messer Caparello P.A. as outside legal counsel relating to the response of CareerSource Pinellas' insurance carriers to the \$1.8 million demand from the United States Department of Labor.

**A motion was made by Commissioner Flowers, seconded by Commissioner Gerard, that the Board approve the hiring of outside counsel by CareerSource Pinellas due to a conflict of interest of its General Counsel. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

The members provided updates regarding their assigned boards and committees and discussed various topics, as follows:

### Commissioner Seel

- Forward Pinellas
- The passing of Gerald Figurski

### Commissioner Gerard

- Health and Human Services Leadership Board

### Commissioner Long

- Tampa Bay Area Regional Transit Authority

### Commissioner Peters

- Pinellas Suncoast Transit Authority
- Dangers of Nitazene synthetic opioids

**Meeting Recessed: 3:57 P.M.**

**Meeting Reconvened: 6:01 P.M.**

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6:00 PM

**PUBLIC HEARINGS**

**BOARD OF COUNTY COMMISSIONERS**

**33. Case No. ZON-21-13 (Philip and Erin Gregory)**

A request for a change of Zoning from R-2, Single Family Residential to R-E, Residential Estate on approximately 1.06 acres located at 8990 131st Street North in unincorporated Seminole.  
(Quasi-Judicial)

Resolution No. 22-33 adopted approving the zoning change. The Local Planning Agency recommended approval of the request, and staff concurred. One letter of support has been received. No citizens appeared to be heard.

**A motion was made by Vice-Chair Long, seconded by Commissioner Peters, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

**34. Case No. ZON-21-14 (Summerset Villas, LLC, c/o Steven DiGiovanni)**

A request for a change of Zoning from R-A, Residential Agriculture to R-5, Urban Residential on approximately 1.97 acres located at 2861 Summerdale Drive in unincorporated Clearwater.  
(Quasi-Judicial)

Resolution No. 22-34 adopted approving the zoning change. The Local Planning Agency recommended approval of the request, and staff concurred. No correspondence has been received. No citizens appeared to be heard.

**A motion was made by Commissioner Gerard, seconded by Vice-Chair Long, that the item be approved. The motion carried by the following vote:**

**Aye:** 7 - Chairman Justice, Vice-Chair Long, Commissioner Eggers, Commissioner Flowers, Commissioner Gerard, Commissioner Peters, and Commissioner Seel

**ADJOURNMENT - 6:04 P.M.**



  
Chair

ATTEST: KEN BURKE, CLERK

By   
Deputy Clerk



# **BY-LAWS**

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.

## **ARTICLE I – NAME, SERVICE AREA, AND OFFICE LOCATION**

### **SECTION 1 – Name**

The name of the organization shall be WorkNet Pinellas, Inc. doing business as and hereinafter referred to as CareerSource Pinellas.

### **SECTION 2 – Service Area**

CareerSource Pinellas, serving as the Local Workforce Development Board by CareerSource Florida, Inc., the State of Florida Workforce Development Board, shall primarily serve the employers and residents of Pinellas County, Florida.

### **SECTION 3 – Office Location**

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

## **ARTICLE II – PURPOSE AND USE OF FUNDS**

### **SECTION 1 – Purpose**

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.
- B. To act as a fiscal agent and administrative entity as defined by the Federal Workforce Innovation and Opportunity Act (“WIOA”), authorized by the State of Florida, the U.S. Department of Labor, and as approved by the Pinellas County Board of County Commissioners serving as the Chief Elected Official.
- C. To enhance the provision of workforce development services; increase the involvement of the business community, including small and minority businesses, in workforce development activities; to increase private sector employment opportunities; and to ensure the economic health of the community.
- D. To place special emphasis on service to welfare recipients, economically disadvantaged adults and youth, dislocated workers, and individuals and employers needing workforce development services as identified in the CareerSource Pinellas strategic plan.

## **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.

## **ARTICLE III - BOARD MEMBERSHIP**

### **SECTION 1 – Governing Body**

CareerSource Pinellas shall be governed by a Board of Directors, to be appointed as provided herein.

### **SECTION 2 – Authority and Responsibilities of the Board**

All corporate powers shall be exercised by or under the authority of the Board of Directors (the “Board” or “Board of Directors” and individual members are sometimes referred to as “Directors”), and the business and affairs of CareerSource Pinellas will be managed under the Board’s direction.

The general functions of the Board shall include:

- A. Establishing policies for the governance, administration and operation of CareerSource Pinellas;
- B. Exercising and fulfilling the specific powers and responsibilities as required under applicable law; and
- C. Discharging their duties in good faith, with the care an ordinary prudent person in a like position would exercise in similar circumstances.

The specific authorities and responsibilities of the Board shall include all authorities and responsibilities delegated to it by applicable federal, state and local laws, regulations, policies and mandates, and shall include:

- A. Adopting, amending or repealing the Articles and these By-Laws;
- B. Electing and removing officers of CareerSource Pinellas;
- C. Ensuring accountable management of real and personal property of CareerSource Pinellas, including approval of the acquisition, conveyance, mortgaging, or encumbering property, and approval of material contracts on behalf of Career Source Pinellas;
- D. Establishing policies, including monetary or other limits, within which administration and staff of CareerSource Pinellas may function independently;
- E. Approving rules and regulations for the administration of CareerSource Pinellas personnel, including approval of pay/compensation plans and employee benefits;

- F. Developing, ratifying and submitting or amending the local workforce plan pursuant to Public Law No. 113-128 WIOA and the provisions of Florida Statute 445.007, subject to the approval of the Pinellas County Board of County Commissioners;
- G. Coordinating agreements with the Pinellas County Board of County Commissioners that are necessary to designate the fiscal agent and administrative entity;
- H. Oversight of programs;
- I. Oversight of administrative costs;
- J. Oversight of performance outcomes;
- K. Identifying and selecting providers of training services, intensive services, youth providers and One-Stop Operators as necessary and applicable;
- L. Developing a budget, subject to the approval of the Pinellas County Board of County Commissioners, for purposes of carrying out the duties of the Board under applicable state and federal law;
- M. Oversight of the budget;
- N. Negotiating and reaching agreement on local performance measures;
- O. Coordinating the workforce investment activities with economic development strategies and developing other employer linkages with such activities; and
- P. Developing the Regional Targeted Occupations List.
- Q. Selecting, hiring and terminating, subject to the approval of the Pinellas County Board of County Commissioners, the Chief Executive Official who shall report directly to the CareerSource Pinellas Board; and
- R. Selecting and hiring or contracting for, or terminating, the provision of legal services to be provided to, and for, CareerSource Pinellas subject to the approval of the Pinellas County Board of County Commissioners. The selected provider of legal services shall report directly to the Board of Directors. The performance of legal services shall be reviewed not less than every calendar year, and any legal services agreement shall be terminable at will and may not have a term beyond twenty-four (24) months. Nothing herein shall prevent legal services contract renewals beyond such twenty-four (24) month term, provided that the Board of Directors shall be required to affirmatively vote to renew such agreement not less than every two years, and only after a review by the Ad Hoc Chief Executive Official/Executive Director and Legal Counsel Selection Committee as provided in Article VI, Section 11 of these By-Laws.

Nothing herein shall be construed to prevent the Pinellas County Board of County Commissioners from removing the CareerSource Pinellas Executive Director or legal services provider. Removal of the CareerSource Pinellas Executive Director or legal services provider is a power reserved to the Pinellas County Board of County Commissioners as the Chief Elected Official.

### **SECTION 3 – Authority of Individual Board Members**

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

### **SECTION 4 - Categories of Board Membership**

All the members of the Board of Directors of CareerSource Pinellas shall be appointed by the Pinellas County Board of County Commissioners in accordance with federal and state legislation, regulations and policies, and consistent with such policies and/or procedures as may be established by the Board of County Commissioners. Such appointments shall include:

- A. The Chairman of the Pinellas County Board of County Commissioners or his/her designee from the Board of County Commissioners, shall fill one of the mandatory seats on the Board as appropriate and as established by federal and state legislation, regulations and/or policies.
- B. A local elected official which must be either a municipal officer, School Board Member, or an additional County Commissioner, appointed by the Board of County Commissioners shall fill a seat on the Board.

### **SECTION 5 – Appointment of Board Members**

- A. Members of the Board of Directors shall be appointed by the Pinellas County Board of County Commissioners subject to the provisions of WIOA and its regulations, and pursuant to the Florida Workforce Innovation Act and policies established by the Governor for the State of Florida. The number of Board members and the categories of membership shall conform to federal and state legislation, regulations and policies.
- B. The Board may make recommendations regarding nominations to the Pinellas County Board of County Commissioners. Such nominations shall be in accordance with the nomination process set forth in the governing statutes and the policies established by the Pinellas County Board of County Commissioners. Appointments to the Board shall be at the discretion of the Pinellas County Board of County Commissioners.
- C. Members of the Board shall serve at the pleasure of the Pinellas County Board of County Commissioners. The Pinellas County Board of County Commissioners shall have the authority to remove a Director from the Board when it determines that the best interests of the workforce program will be served.

## **ARTICLE IV – BOARD OF DIRECTORS**

### **SECTION 1 – Terms of Membership**

- A. Directors shall serve staggered terms and may not serve for more than 8 consecutive years, unless such member is a representative of a governmental entity. Service in a term of office which commenced before July 1, 2021, does not count toward the 8-year limitation. Members of the Board shall serve for fixed and staggered terms of two years with the exceptions described within these By-Laws.
- B. If a member resigns prior to the expiration date of his/her term in office, nominations for filling the vacancy shall be made to the Pinellas County Board of County Commissioners in the same manner as is described within these By-Laws. Upon appointment, the new member shall serve the unexpired term of the member whose vacancy he/she is filling.
- C. The Chairman of the Pinellas County Board of County Commissioners, or his or her designee, and the local elected official are not subject to the Board membership term limitations specified herein.

### **SECTION 2 – Resignation**

A member may resign his or her membership on the CareerSource Pinellas Board at any time by submitting a resignation in writing to the Chair or Chief Executive Official/Executive Director. In the case of the resignation of the Chair, a resignation shall be submitted in writing to the Chair Elect or Chief Executive Official/Executive Director. A resignation shall become effective upon the date specified in such notice, or, if no date is specified, upon receipt of the resignation by the Chair.

After two consecutive absences, or three (3) absences in a fiscal year from regularly scheduled meetings of the CareerSource Pinellas Board without an excuse approved by the Chair the Chief Executive Official shall notify the offending Director to determine whether that individual wishes to resign their seat on the Board and to notify them that any further unexcused absence in the fiscal year shall constitute grounds for the Board to recommend removal of the Director under Section 3D.

For members of committees that are not defined persons identified to be members of such a committee by title or position, three (3) consecutive absences from regularly scheduled committee meetings of CareerSource Pinellas, without an excuse approved by the committee chair, shall constitute a de facto resignation of the committee member from that committee. De facto resignation from a committee will not impact the individuals' membership on the Board or membership on other committees.

### **SECTION 3 – Revocation of Membership**

The Board of Directors may, by a two-thirds affirmative vote at a meeting where a quorum has been established, recommend revocation of a Director to the Pinellas County Board of County Commissioners for the following reasons:

- A. Should a Director cease to represent the category to which they were appointed to fill on the Board through change in status;
- B. Disability, illness or inability to perform their duties on the Board;
- C. Unethical or illegal practices or actions, or
- D. Failure to carry out duties, responsibilities, and functions of a Board member as defined in federal and state law, regulations, and these By-Laws.

### **SECTION 4 – Notification of Vacancies**

The Chair of the Board will notify the Board of County Commissioners when vacancies occur through written correspondence with the Commissioner assigned to serve on the Board of Directors, the Board of County Commissioners, and any other party designated in writing by the County, and will annually submit written notification of all vacancies at the beginning of each fiscal year.

## **ARTICLE V - BOARD OFFICERS**

The Officers of CareerSource Pinellas shall consist of a Chair, a Chair Elect, a Vice Chair, a Secretary and a Treasurer. The Chairman of the Pinellas County Board of County Commissioners, or his/her designee from the Board of County Commissioners, shall occupy the Vice Chair position.

### **SECTION 1- Election of Officers**

The Chair, Chair Elect, Treasurer, and Secretary of the Board shall be elected as follows:

- A. The slate of Officers shall be recommended to the Board of Directors by the Ad-Hoc Nominating Committee and selected based upon a majority vote of the quorum present at the annual meeting at which the slate is presented.
- B. The annual meeting at which the slate of Officers shall be elected shall take place in June or on a date as otherwise set by the Board, and the Officers shall take office in July.
- C. The CareerSource Pinellas Chair and Chair Elect shall be selected from among the business representatives.

## **SECTION 2 – Duties of Officers**

### **A. Duties of the Chair shall include:**

- Presiding at all meetings of the CareerSource Pinellas Board of Directors;
- Serving as chair of the Executive Committee;
- Making all committee chair appointments;
- Calling special meetings of the Board;
- Establishing Ad-Hoc Committees as deemed necessary to conduct the business of the Board and make appointments thereto;
- Serving as a member of the Audit Committee; and
- Performing all duties incident to the office of Chair.

### **B. Duties of the Chair Elect shall include:**

- Presiding over meetings in the absence of the Chair;
- Serving as a member of the Executive Committee; and
- Performing all duties incident to the office of Chair in the absence of the Chair.

### **C. Duties of the Treasurer shall include:**

- Serving as a member of the Executive Committee;
- Serving as a member of the Audit Committee;
- Serving as Chair of the Finance Committee; and
- Making a report on the financial status at each regular meeting of the Board.

### **D. Duties of the Secretary shall include:**

- Serving as a member of the Executive Committee;
- Signing all bank resolutions; and
- Reviewing all Board minutes prior to official adoption by the Board of Directors.

### **E. Duties of the Vice Chair shall include:**

- Presiding over meetings in the absence of the Chair and the Chair Elect;
- Serving on the Audit Committee; and
- Serving on the Executive Committee.

## **SECTION 3 – Terms of Office**

The term of office for the Chair, Chair Elect, Secretary and Treasurer of CareerSource Pinellas shall be for one (1) year, from July 1 through June 30.

CareerSource Pinellas Officers may serve two consecutive terms of one year each in the same office, if re-elected, provided that the time in office does not exceed the limits of their term of membership on the Board. After two consecutive terms, **for officers other**



than the Chair, the Officer shall then step down from their position for a minimum of one year, although they may continue to serve as CareerSource Pinellas Board members, or in other offices.

The Vice Chair is not subject to the Officer term limits specified herein.

#### **SECTION 4 – Vacancy in One of the Officer Positions**

If a vacancy in any office but the Chair occurs due to the illness, resignation, etc. of the Officer elected, a replacement shall be elected to serve the unexpired term of office at the next regularly scheduled Board meeting. If the office of Chair becomes vacant, the Chair Elect will assume the office of Chair.

### **ARTICLE VI – COMMITTEES**

#### **SECTION 1 – Standing Committees**

The Standing Committees of CareerSource Pinellas shall be the Executive Committee, the One Stop Committee, the Workforce Solutions Committee, the Finance Committee, and the Audit Committee. In addition, there may be such ad hoc committees as determined necessary by the Chair or as specified in these By-Laws.

Other than those committees required by law, CareerSource Pinellas may vote to expand or combine committees as appropriate for the efficient operation of the business of CareerSource Pinellas. A committee must be chaired by a Director.

#### **SECTION 2 – Terms of the Executive Committee members and Committee Chairs**

CareerSource Pinellas Executive Committee Members and Committee Chairs may serve in those positions for two consecutive terms of one year each, if re-elected or re-appointed and shall then step down from their position for a minimum of a year, although they may continue to serve as CareerSource Pinellas Board members, or in other offices.

#### **SECTION 3 – General Committee Membership**

- A. A committee member, with the exception of an Executive Committee member, may designate an alternate in writing who shall have the powers, including voting, of the committee member when that alternate attends committee meetings in lieu of the committee member. No other proxy voting is allowed.
- B. CareerSource Board members shall comprise a majority of each committee except as otherwise provided in these By-Laws.
- C. The Chair of any standing committee with the exception of the Executive Committee, at his/ her discretion, may appoint Board and non-Board members to serve on the committee except as otherwise provided in these By-Laws.
- D. Non-Board committee members shall serve for a two-year term from their appointment date. Terms are renewable for additional two-year periods at



the discretion of the committee chairperson or appointing authority. Employees of CareerSource Pinellas may not serve as members of a committee.

#### **SECTION 4 – Executive Committee Membership, Duties and Responsibilities**

CareerSource Pinellas shall have an Executive Committee consisting of the Officers, the Chairs of the Standing Committees, Past Chair, and up to five at-large members appointed by the Chairperson.

The Executive Committee may meet; (i) only in months when the full Board of Directors does not meet and time is of the essence in taking any action; (ii) in emergency situations where the failure to act would result in irreparable harm to persons or workforce program continuity, and the full Board of Directors cannot be convened. The Executive Committee shall have and exercise the authority of the Board of Directors in the governance of the affairs of CareerSource Pinellas with the exception of (i) adopting, repealing, or amending the Articles, the Interlocal Agreement or these By-Laws; (ii) approval or modification of the annual budget; (ii) approval or amendment of the 4 year or other plans required by the WIOA; (iii) acquisition or conveyance of real estate; (iv) pledging, mortgaging, or encumbering real property, or pledging or encumbering personal property other than in the ordinary course of business for expenditures included in the line item budget and/or pre-approved by the Board of Directors; (v) staff pay or compensation plans; (vi) approval or amendment of the CareerSource Pinellas administrative code/governing policies, including purchasing and financial policies; (vii) approval of the annual financial audit and responses thereto, as well as the early termination of the audit firm; (viii) hiring, disciplining, and discharging the Chief Executive Official/executive director and legal counsel.

Any items approved by the Executive Committee will appear as consent agenda items at the next meeting of the full Board of Directors. Such consent agenda items will be distributed to Board members at least 72 hours prior to the Board meeting date and time.

Delegation of authority to the Executive Committee shall not relieve the Board of Directors or any individual Director of any responsibility imposed on it, or him or her, by the By-Laws or by any applicable law.

The Executive Committee shall also be responsible for planning, conducting and/or recommending Board Member development or in-service activities.

## **SECTION 5 – One Stop Committee Membership, Duties and Responsibilities**

The One Stop Committee shall be chaired by a Board Member appointed by the Board Chair and shall consist of those members deemed appropriate and appointed to the committee by the One Stop Committee Chair. The One Stop Committee shall be responsible for advising the Board of Directors on matters related to the following committee areas of oversight:

- Providing assistance with planning, operational and other issues relating to the one-stop delivery system;
- Providing assistance with planning, operational, and other issues relating to the provision of services to youth;
- Providing assistance with planning, operational and other issues relating to the provision of services to individuals with disabilities;
- Reviewing the plans and services of other agencies and one-stop partners with the intent to improve coordination of services;
- Reviewing customer survey feedback to ensure customer input is made part of the plan of service;
- Reviewing the enrollment and training of individuals under the Workforce Investment Act;
- Reviewing the services delivered to welfare transition customers;
- Reviewing services and programs delivered to recognized target groups;
- Reviewing the operation and performance of any grants or other funding received;
- Reviewing periodic reports on performance in accordance with the committee's annual strategic plan; and
- Planning for future changes and improvements to the one-stop system.

## **SECTION 6 – Workforce Solutions Committee Membership, Duties and Responsibilities**

The Workforce Solutions Committee shall be chaired by a Board member appointed by the Board Chair and shall consist of those members deemed appropriate and appointed to the Committee by the Workforce Solutions Committee Chair. The Workforce Solutions Committee shall be responsible for assisting Board members in actively participating in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities, by engaging in the following activities:

- Reviewing and recommending approval of the services and programs delivered to employers;
- Reviewing and recommending approval of training vendor applications and other actions pertaining to training vendors;
- Reviewing periodic training vendor performance reports;
- Reviewing the region's activities related to targeted industries;
- Creating and maintaining the regional targeted occupations list; and

- Reviewing and recommending approval of the Board's partnerships with economic development organizations and other business associations in accordance with the committee's annual strategic plan.

## **SECTION 7 – Finance Committee Membership, Duties and Responsibilities**

The Finance Committee shall be chaired by the Treasurer, and shall consist of those members deemed appropriate and appointed to the Committee by the Treasurer. The Finance Committee shall be the Committee of the Board charged with oversight responsibilities regarding the fiscal affairs of the Agency. The Committee's responsibilities shall include, but are not limited to:

- Reviewing a draft of the annual budget and submitting the tentative annual budget, along with a recommendation, to the Board of Directors for action;
- Reviewing and recommending approval of all subsequent modifications to the budget;
- Reviewing the annual audit and accompanying management letters with agency responses and forwarding any recommendations to the Board of Directors;
- Providing financial oversight through review of financial monitoring reports and forwarding any recommendations to the Board of Directors;
- Reviewing the agency's periodic financial statements and report on the organizations financial status at each meeting of the of the Board of Directors and of the Executive Committee; and
- Serving on procurement review panels at the request of the Chief Executive Official/executive director and/or CFO/finance director.

## **SECTION 8 – Audit Committee Membership, Duties and Responsibilities**

The Audit Committee shall consist of the County Commissioner serving as the Vice-Chair on the Board of Directors, two members appointed by the Board of County Commissioners, the Chair of the CareerSource Pinellas Board of Directors, and the CareerSource Pinellas Treasurer. No staff member of either the County or CareerSource Pinellas shall serve on the Audit Committee, but may serve as staff to the Committee. CareerSource Pinellas' Finance Director shall serve as primary staff to the Audit Committee. The Audit Committee shall be responsible for:

- Making recommendations to the Board of Directors on the selection of an independent auditor, including terms of engagement and compensation;
- Overseeing the annual audit of any and all programs operated by CareerSource Pinellas in compliance with OMB Circular A-133, including approving annual audit plans;
- Reviewing the annual financial audit and recommending responses to any adverse findings thereto to the Board of Directors;
- Authorizing and procuring Performance audits as defined by Sec 11.45, Florida Statutes, to be performed by independent firms or the Division of

Inspector General, Clerk of the Circuit Court and Controller, subject to ratification by the Board of Directors;

- Reviewing audits and reports on the monitoring of activities, operations and expenditures under the programs operated by CareerSource Pinellas and reporting findings and making recommendations on corrective actions to the Board of Directors;
- Reviewing such other interim or annual reviews and reports, whether conducted by an audit firm, entities expert in evaluation and/or monitoring of CareerSource Pinellas programs or county staff as determined by the Audit Committee and reporting findings and making recommendations on corrective actions to the Board of Directors.

### **SECTION 9 – Ad-Hoc Nominating Committee Duties and Responsibilities**

The Chair of CareerSource Pinellas shall appoint the Chair and members of the ad-hoc Nominating Committee from among the membership of the Board. The Vice Chair and Chair Elect shall serve as members of the Committee. The responsibilities of The Nominating Committee shall include:

- Meeting prior to the fourth quarterly or annual Board meeting to select a slate of Officers to be presented to the CareerSource Pinellas Board at the annual meeting; and
- May advise the Chair Elect on appropriate candidates for Executive Committee membership and Committee chairs.

### **SECTION 10 – Ad Hoc Compensation Committee Membership, Duties and Responsibilities**

The Compensation Committee shall be chaired by a Board member appointed by the Board Chair and shall consist of those members deemed appropriate and appointed to the Committee by the Compensation Committee Chair. The Compensation Committee shall be responsible for:

- Reviewing and evaluating employee performance review process;
- Reviewing, evaluating and making recommendations to the Board of Directors relating to the approval of employee pay and compensation plans;
- Reviewing and evaluating employee benefits programs and making recommendations to the Board of Directors relating to the approval of these programs;
- Evaluating and approving training policies to ensure that employees meet the necessary requirements under the Workforce Investment and Opportunity Act;
- Providing assistance with planning, operational and other issues relating to the provision of fair labor practices in the workplace; and
- Meeting at least annually and reporting findings and recommendations to the Board of Directors at the annual meeting.

## **SECTION 11 - Ad Hoc Chief Executive Official/Executive Director and Legal Counsel Selection Committee Membership, Duties and Responsibilities**

The Ad Hoc Chief Executive Official/Executive Director and Legal Counsel Selection Committee shall be constituted, beginning in 2019 and not less than every calendar year, or whenever there is a vacancy for the CareerSource Pinellas executive director or legal counsel positions. The Committee shall consist of five members, including the Board of County Commissioner's member serving as the Vice-Chair, the CareerSource Pinellas Chair, Pinellas County Economic Development Department Board Member, the local elected official member, and one member appointed by the Chair. The Chair shall designate the chair of the Committee. CareerSource Pinellas and County staff may serve as staff to this Committee.

The Committee shall, subject to the final approval of the Board of Directors, be responsible for:

- Not less than once every calendar year, reviewing the performance and compensation of the executive director and the legal counsel;
- Not less than once every calendar year, reviewing, evaluating and/or establishing, and, if needed, updating or revising the executive director qualifications and job description;
- Not less than once every calendar year, reviewing, evaluating and/or establishing, and, if needed, updating or revising and the legal counsel qualifications and terms of engagement or employment;
- Establishing the recruitment process for the Chief Executive Official/Executive Director or legal counsel positions; and
- Screening and ranking applications for the executive director position and proposals or applications for legal counsel for submittal to the Board of Directors for approval and hiring, subject to the approval of the Pinellas County Board of County Commissioners.

## **ARTICLE VII - MEETINGS**

### **SECTION 1 – Notice, Minutes, etc.**

- A. Regular meetings of the Board and committees of the Board shall be held at a place to be determined by the members, at such times and as often as they may deem necessary.
- B. The Chief Executive Official/executive director or his/her designee shall send written notice of each Board and committee meeting to the members at such times and as often as they may deem necessary.
- C. The public shall be informed of Board and committee meetings through notice(s), which shall state the purpose of the meeting, the time and the place. Special meeting notices shall state the purpose of the meeting and whether it has been called by the Chair or by petition.
- D. All Board and committee meetings shall be subject to the Sunshine and Open Meeting Laws of the State of Florida.

- E. The Board and committees may use any method of telecommunications to conduct meetings, including establishing a quorum through telecommunications, provided that the public is given proper notice of the telecommunications meeting and reasonable access to observe and, when appropriate, participate.
- D. Special meetings of members may be called at any time by the CareerSource Pinellas Chair or by a petition signed by not less than twenty-five percent (25%) of the membership of the CareerSource Pinellas Board, setting forth the reason for calling such a meeting.
- E. CareerSource Pinellas committees shall meet at the call of the Committee Chair, the Committee Vice Chair or the CareerSource Pinellas Board Chair.
- F. Minutes shall be kept of all Board and committee meetings. Minutes shall be reviewed and approved at the next CareerSource Pinellas Board or committee regular 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.
- G. The Chief Executive Official/executive director or his/her designee shall prepare agendas for Board and committee meetings, which will be distributed to the full Board or committee at least 72 hours prior to the Board or committee meeting date and time. Any Director may submit an item for inclusion on an agenda. Agendas may be modified within 72 hours of a meeting if the item is time sensitive.
- H. Members of the public may attend Board or committee meetings and will be given an opportunity to be heard at such meetings except in cases where the meeting involves an emergency situation affecting the public health, welfare, or safety, and comments would cause an unreasonable delay, a ministerial act, is exempt from Florida Statute Section 286.011, or where the Board or committee is acting in a quasi-judicial capacity. An individual is limited to three (3) minutes to make public comment at a Board or committee meeting, absent the Board or committee granting the individual an extension of time. The procedures for an individual to inform the Board or committee of a desire to be heard at a Board or committee meeting will be published on the agenda.

## **SECTION 2 – Limitation on Participation**

Participation in Board meetings and Executive Committee meetings shall be limited to members of the Board, Committees and staff with the following exceptions:

- A. Regularly scheduled agenda items that call for reports or participation by non- members.
- B. A time shall be set on the agenda for the receipt of public comment.

### **SECTION 3 – Parliamentary Procedures**

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

## **ARTICLE VIII – QUORUM AND VOTING**

### **SECTION 1 – Quorum**

- A. A quorum of the Board shall consist of forty percent (40%) plus one of the Board membership.
- B. A quorum of the Executive Committee, the Finance Committee, and the Ad Hoc Executive Director and Legal Counsel Selection Committee shall consist of forty percent (40%) plus one of the Committee members.
- C. Except for the above Committees, the number of Committee Members present for a committee meeting shall constitute a quorum for the purpose of conducting the business of the Committee.
- D. Board members participating by telephone or other types of communications technology will be included as part of the quorum as a quorum does not have to be physically present to conduct business.

### **SECTION 2 – Voting and Related Party Contracts**

- A. Any action that may be taken by the Board of Directors or a committee of the Board shall be considered the act of the Board or Committee only if the action is taken by an affirmative vote of the majority of the members in attendance at a meeting where a quorum has been established.
- B. Each member of the CareerSource Pinellas Board of Directors shall have one (1) vote when present at a meeting of the Board, whether in person or by phone or other type of communication technology. Members may not vote by proxy.
- C. Voting privileges of non-board members selected to serve on a committee are limited to that committee.
- E. When an issue presents a possible conflict of interest to a member, said member shall disclose the conflict of interest and shall abstain from voting on said issue.
- F. Contracts awarded to members of the Board of Directors shall require a 2/3 affirmative vote of the quorum in attendance at the Board meeting.
- G. A Board member acting as presiding Officer at a meeting of the Board or a Committee of the Board held pursuant to these By-Laws shall be entitled to vote on the same basis as if not acting as the presiding Officer.
- H. Any item considered, voted on and approved by a committee of the Board of Directors, excluding approval of meeting minutes and adjournment of meeting, shall be brought forth to the Board of Directors for consideration at its next meeting.



### **SECTION 3 – Consent Agenda**

As soon as practicable following a meeting of the Executive Committee, minutes of the meeting shall be transmitted to Members of the Board of Directors. All actions of the Executive Committee are to be brought before the full Board as a consent agenda at their next scheduled meeting. Consent agenda items are to be distributed to the full Board at least 72 hours prior to the Board meeting date and time.

## **ARTICLE IX - AMENDMENTS**

These By-Laws may be amended or replaced by vote of the CareerSource Pinellas Board, subject to approval by the Pinellas County Board of County Commissioners. Action by the CareerSource Pinellas board shall be by an affirmative vote of two-thirds of the membership of the CareerSource Pinellas Board, after notice, which shall specify or summarize the changes proposed to be made. Such notice shall be made no less than seven (7) business days prior to the meeting at which such amendment or repeal is acted upon.

## **ARTICLE X - GENERAL PROVISIONS**

Nothing in these By-Laws shall be construed to take precedence over federal, state or local laws or regulations, or to constrain the rights or obligations or the units of the local elected officials or governments party to the consortium agreement.

## **ARTICLE XI - INDEMNIFICATION**

### **SECTION 1 – Indemnification of Board Members**

CareerSource Pinellas, Inc. may indemnify any CareerSource Pinellas Board Director, Officer, or former CareerSource Pinellas Board Director or Officer in accordance with and as limited by Chapters 607 and 617 Florida Statutes.

### **SECTION 2 – Indemnification Insurance**

CareerSource Pinellas and the Pinellas County Board of County Commissioners shall have the power to purchase and maintain insurance sufficient to meet this Article's indemnification provisions.

## **ARTICLE XII - ENACTMENT PROVISION**

Pursuant to 20 C.F.R. 679.310(g), these By-Laws shall become effective after approval by the Pinellas County Board of County Commissioners acting as the Chief Elected Official.

These amended By-Laws were adopted as of this April 26, 2022.