



## **Board of Directors Meeting**

Thursday, January 23, 2025 - 8:00 a.m. to 9:30 a.m.

Location: 3660 N. Washington Blvd, Sarasota, FL

**This is an in-person meeting with virtual or call-in capabilities**

[Join Teams Meeting](#)

Phone 1-786-600-3104

Conference ID: 234 310 443 476#

### **AGENDA**

**Call to Order– David Kraft, Chair – Vision Consulting Group, Inc.**

#### **Chief Local Elected officials for 2025**

- Sarasota County Commissioner: Teresa Mast
- Manatee County Commissioner: Tal Siddique

#### **Action Items**

- Acceptance of Financial Audit Report for Program Year Ending June 30, 2024 – Ben Clark, James Moore & Co.
- Approval of November 14, 2024, Combined Executive Committee and Board of Directors Meeting Minutes – David Kraft

#### **CEO Report – Joshua Matlock**

#### **Other Board Business**

- One-Stop Operator/Education and Industry Consortium Reports- Terri Clark, TClark Workforce Solutions, LLC
- Finance and Performance Committee Report – Jim Bos

#### **Staff Reports**

- Kathy Bouchard, CTO
- Anthony Gagliano, COO

**Public Comments/ Board of Directors Meeting Closing Remarks – David Kraft**

**Meeting Adjournment- David Kraft**

***Next Board of Directors Meeting is March 27, 2025***

*Location: 3660 N. Washington Blvd, Sarasota, FL*

\*Members shall disclose any voting conflict as required under Florida Statute 112.2143 and abstain from discussion or voting on any business that would inure to his or her special private gain or loss.



**ACTION ITEM -  
Financial  
Audit Report**

**SUNCOAST WORKFORCE BOARD, INC. D/B/A  
CAREERSOURCE SUNCOAST**

**FINANCIAL STATEMENTS**

**JUNE 30, 2024 WITH SUMMARIZED  
INFORMATION AS OF JUNE 30, 2023**

Draft

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
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## INDEPENDENT AUDITORS' REPORT

To the Board of Directors,  
Suncoast Workforce Board, Inc.  
d/b/a CareerSource Suncoast

### Report on the Audit of the Financial Statements

#### *Opinion*

We have audited the financial statements of Suncoast Workforce Board, Inc., d/b/a CareerSource Suncoast (the Organization), which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Organization as of June 30, 2024, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

#### *Basis for Opinion*

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audits contained in *Government Auditing Standards (GAS)*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our 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 accounting principles generally accepted in the United States of America, 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.

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 Organization's ability to continue as a going concern for one year after the date that the financial statements are issued.

### ***Auditors' Responsibilities for the Audit of the Financial Statements***

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 auditors' 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 and GAS 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 and GAS, 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 Organization'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 Organization's ability to continue as a going concern for a reasonable period of time.

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.

### **Report on Summarized Comparative Information**

We have previously audited Suncoast Workforce Board, Inc. d/b/a CareerSource Suncoast's June 30, 2023, financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated January 29, 2024. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2023, is consistent, in all material respects, with the audited financial statements from which it has been derived.

## Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards is presented for purposes of additional analysis as required by the audit requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* and is not a required part of the financial statements. 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 has been subjected to the 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 auditing standards generally accepted in the United States of America. In our opinion, the Schedule of Expenditures of Federal Awards is fairly stated in all material respects in relation to the financial statements as a whole.

## Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated January 1, 2030, on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

James Moore & Co., P.L.

Tallahassee, Florida  
January 1, 2030

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
STATEMENT OF FINANCIAL POSITION  
JUNE 30, 2024 WITH SUMMARIZED  
INFORMATION AS OF JUNE 30, 2023**

	<b>2024</b>	<b>2023</b>
<b><u>ASSETS</u></b>		
<b>Current assets</b>		
Cash and cash equivalents	\$ 1,025,294	\$ 771,178
Certificates of deposit	500,009	475,000
Accounts receivable	-	4,159
Grants receivable	72,359	35,152
Prepaid expenses	45,427	38,803
Total current assets	1,643,089	1,324,292
<b>Noncurrent assets</b>		
Fixed assets		
Furniture and equipment	323,246	323,246
Accumulated depreciation	(323,246)	(323,246)
Net fixed assets	-	-
<b>Total Assets</b>	<b>\$ 1,643,089</b>	<b>\$ 1,324,292</b>
<b><u>LIABILITIES AND NET ASSETS</u></b>		
<b>Current liabilities</b>		
Accounts payable	\$ 78,798	\$ 61,624
Accrued expenses	123,220	111,880
Accrued leave	235,471	217,069
Refundable advances	328,860	271,674
Total current liabilities	766,349	662,247
<b>Net assets</b>		
Without donor restrictions:		
Undesignated	876,740	662,045
Total Net Assets	876,740	662,045
<b>Total Liabilities and Net Assets</b>	<b>\$ 1,643,089</b>	<b>\$ 1,324,292</b>

The accompanying notes to the financial statements  
are an integral part of this statement.



**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
STATEMENT OF ACTIVITIES  
FOR THE YEAR ENDED JUNE 30, 2024 WITH SUMMARIZED  
INFORMATION FOR THE YEAR ENDED JUNE 30, 2023**

	<b>2024</b>	<b>2023</b>
	<b>Without Donor Restrictions</b>	<b>Without Donor Restrictions</b>
<b>Support and Revenue</b>		
Contract and grant revenue	\$ 7,439,237	\$ 6,667,714
Interest	16,485	6,349
Rental revenue	11,203	90,080
Other revenue	431,525	194,620
Total support and revenue	7,898,450	6,958,763
<b>Expenses</b>		
Program services	7,061,759	6,143,964
General and Administrative	621,996	697,312
Total expenses	7,683,755	6,841,276
<b>Change in net assets without donor restrictions</b>	214,695	117,487
<b>Net assets without donor restrictions, beginning of year</b>	662,045	544,558
<b>Net assets without donor restrictions, end of year</b>	\$ 876,740	\$ 662,045

The accompanying notes to the financial statements  
are an integral part of this statement.

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
STATEMENT OF FUNCTIONAL EXPENSES  
FOR THE YEAR ENDED JUNE 30, 2024 WITH SUMMARIZED  
INFORMATION FOR THE YEAR ENDED JUNE 30, 2023**

	<b>2024</b>						<b>2023</b>	
	<b>WIOA Programs</b>	<b>Welfare Transition</b>	<b>Wagner Peyser and Veterans</b>	<b>Other Employment Related Programs</b>	<b>Other Funds</b>	<b>General and Administrative</b>	<b>Total</b>	<b>Total</b>
Salaries and wages	\$ 1,415,152	\$ 671,371	\$ 344,243	\$ 318,098	\$ 53,125	\$ 409,555	\$ 3,211,544	\$ 2,940,209
Payroll taxes and benefits	438,033	219,118	86,989	69,546	11,597	77,662	902,945	891,541
Client training	816,781	53,074	-	47,570	10,912	-	928,337	811,675
Other client-related services	1,060,519	452,912	32,380	22,135	41,652	-	1,609,598	762,407
Short-term lease	94,827	52,866	124,532	17,430	-	13,723	303,378	651,814
Repairs and maintenance	44,045	45,160	89,528	17,562	5,992	18,429	220,716	260,233
Telephone and communications	-	2,013	26,391	-	-	-	28,404	112,178
Professional services	17,048	22,465	834	3,638	10,620	73,828	128,433	107,517
Meetings and seminars	30,898	15,897	31,029	3,898	9,219	16,355	107,296	107,041
Outreach and recruitment	63,028	25,481	11,674	2,879	6,554	-	109,616	105,975
Insurance	12,911	8,659	13,778	3,488	-	7,546	46,382	59,313
Dues and subscriptions	1,730	931	4,747	363	4,524	1,954	14,249	14,999
Materials and supplies	3,545	7,875	21,345	8,510	26,877	1,572	69,724	9,813
Depreciation	-	-	-	-	-	-	-	2,590
Postage	607	400	620	134	-	-	1,761	2,108
Interest	-	-	-	-	-	1,372	1,372	1,863
Total Expenses	<u>\$ 3,999,124</u>	<u>\$ 1,578,222</u>	<u>\$ 788,090</u>	<u>\$ 515,251</u>	<u>\$ 181,072</u>	<u>\$ 621,996</u>	<u>\$ 7,683,755</u>	<u>\$ 6,841,276</u>

The accompanying notes to the financial statements  
are an integral part of this statement.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**STATEMENT OF CASH FLOWS**  
**FOR THE YEAR ENDED JUNE 30, 2024 WITH SUMMARIZED**  
**INFORMATION FOR THE YEAR ENDED JUNE 30, 2023**

	<u>2024</u>	<u>2023</u>
<b>Cash flows from operating activities</b>		
Cash received from grantors, contractors and contributors	\$ 7,906,103	\$ 7,003,984
Cash paid to employees and vendors	(7,643,463)	(6,871,427)
Interest received	16,485	6,349
Net cash provided by (used in) operating activities	<u>279,125</u>	<u>138,906</u>
<b>Cash flows from investing activities</b>		
Purchases of certificates of deposit	(25,009)	(300,497)
Net cash provided by (used in) investing activities	<u>(25,009)</u>	<u>(300,497)</u>
<b>Net increase (decrease) in cash and cash equivalents</b>	<u>254,116</u>	<u>(161,591)</u>
<b>Cash and cash equivalents, beginning of year</b>	771,178	932,769
<b>Cash and cash equivalents, end of year</b>	<u>\$ 1,025,294</u>	<u>\$ 771,178</u>
<b>Reconciliation of change in net assets</b>		
<b>to net cash provided by (used in) operating activities</b>		
Change in net assets	<u>\$ 214,695</u>	<u>\$ 117,487</u>
Adjustments to reconcile change in net assets		
to net cash provided by (used in) operating activities:		
Depreciation	-	2,590
Decrease in grants receivable	(37,207)	183
(Increase) decrease in accounts receivable	4,159	(2,895)
(Increase) decrease in prepaid expenses	(6,624)	(37,312)
Increase (decrease) in accounts payable	17,174	(74,095)
Increase (decrease) in accrued expenses	11,340	49,841
Increase (decrease) in refundable advances	57,186	54,282
Increase (decrease) in accrued leave	18,402	28,825
Total adjustments	<u>64,430</u>	<u>21,419</u>
<b>Net cash provided by (used in) operating activities</b>	<u>\$ 279,125</u>	<u>\$ 138,906</u>

The accompanying notes to the financial statements  
are an integral part of this statement.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**NOTES TO FINANCIAL STATEMENTS**  
**JUNE 30, 2024**

(1) **Summary of Significant Accounting Policies:**

The following is a summary of the more significant accounting policies of the Suncoast Workforce Board, Inc. d/b/a CareerSource Suncoast (the Organization), which affect significant elements of the financial statements:

(a) **Reporting entity**—The Organization is a nonprofit organization under the state of Florida Not-for-Profit Corporation Act and is exempt from income taxes according to the provisions of Section 501(c)(3) of the Internal Revenue Code (IRC). In addition, the Organization qualifies for the charitable contribution deduction and has been classified as an organization that is not a private foundation.

The Organization was incorporated under the laws of the State of Florida on September 2, 1983, as Manasota Industry Council, Inc. (the Council), a not-for-profit corporation organized to serve as the administrative entity and grant recipient with the State of Florida Department of Commerce and Employment Security for the Job Training Partnership Act (JTPA) Program. Effective October 1, 1996, the Council was restructured under the Workforce Florida Act and changed its legal name to the Suncoast Workforce Development Board, Inc. The name was subsequently changed to the Suncoast Workforce Board, Inc., effective April 16, 2001. Effective February, 2014 Suncoast Workforce Board, Inc. changed to d/b/a CareerSource Suncoast as part of a statewide rebranding initiative for all 24 regional workforce boards to align as a single universal brand identity.

On August 7, 1998, the Federal Workforce Investment Act of 1998 (WIA) was signed into law. It replaced the JTPA, which was repealed effective July 1, 2000. This act combined many of the services supported by the JTPA using a "One-Stop" approach providing universal access to core services for both job seekers and employers. The State of Florida enacted legislation, the Workforce Innovation Act of 2000, which implemented provisions of the WIA. On July 22, 2014 the Workforce Innovation and Opportunity Act (WIOA) was signed into law and took effect on July 1, 2015. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. 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.

The Organization, a 26-member public-private partnership, serves as the Administrative entity and Grant Recipient for Florida Region 18, comprising Sarasota and Manatee Counties, for various funding streams including WIOA Adult, Youth and Dislocated Worker programs, Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), and Reemployment Services and Eligibility Assessments (RESEA). In addition, the Organization administers jointly managed programs with the Florida Department of Commerce (DOC) including Wagner Peyser Labor Exchange and Reemployment Services and Veterans' programs. Career and training services are offered in three One-Stop Career Centers located in Sarasota, Bradenton, and North Port, Florida; at public schools in the Manatee and Sarasota County School Districts (including Pre-Apprenticeship, Career Counseling, After School and Out-of-School programs within the school system), and within the local community. The Organization also serves as Administrative Entity and/or Fiscal Agent for workforce related programs that complement and further the goals and mission of the Organization.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**NOTES TO FINANCIAL STATEMENTS**  
**JUNE 30, 2024**

(1) **Summary of Significant Accounting Policies:** (Continued)

The Organization develops, plans, monitors, and administrates the following grants and programs:

- Wagner Peyser
- Disabled Veterans' Outreach Program
- Local Veterans' Outreach Program
- Trade Adjustment Assistance
- Unemployment Insurance
- Workforce Innovation and Opportunity Act – Adult, Youth, and Dislocated Worker
- National Emergency
- Supplemental Nutrition Assistance Program
- Temporary Assistance for Needy Families

(b) **Basis of accounting**—The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with the generally accepted in the United States of America.

(c) **Basis of financial statement presentation and accounting for contributions**—The accompanying financial statements include all funds and activities over which the board of directors of the Organization has oversight and financial responsibility.

The Organization prepares its financial statements in accordance to the Financial Accounting Standards Board (FASB) *Accounting Standards Codification (ASC) 958, Not-for-Profit Entities*.

(d) **Net assets**—Net assets, revenues, gains, and losses are classified based on the existence or absence of donor or grantor-imposed restrictions. Accordingly, net assets and changes therein are classified and reported as follows:

*Net Assets Without Donor Restrictions* – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions

*Net assets with donor restrictions*—Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that those resources be maintained in perpetuity. Restricted contributions by donors are reported as increases in net assets without donor restrictions if the restrictions expire (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the revenue is recognized. All other donor-restricted contributions are reported as increases in net assets with donor restrictions, depending on the nature of the restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions. There are no net assets with donor restrictions at June 30, 2024.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**NOTES TO FINANCIAL STATEMENTS**  
**JUNE 30, 2024**

(1) **Summary of Significant Accounting Policies:** (Continued)

Contributions are recognized when cash, securities or other assets, an unconditional promise to give, or a notification of a beneficial interest is received. Conditional promises to give, that is, those with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

A significant portion of the Organization’s revenue is derived from cost-reimbursable federal, state, and local contracts and grants, which are conditioned upon certain performance requirements and/ or the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when we have incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as refundable advances in the statement of financial position. At June 30, 2024, \$328,860 have been received in advance and/or have not been recognized because qualifying expenditures have not yet been incurred under our federal, state, and local contracts and grants.

(e) **Use of estimates**—The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amount of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenue and expenses during the reporting period. Actual results could differ from those estimates.

(f) **Functional allocation of expenses**—The costs of providing the various programs and other activities have been summarized on a functional basis in the Statement of Activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

(g) **Fixed assets and depreciation**—Fixed Assets are defined by the Board as assets with an initial, individual cost of \$5,000 or more and an estimated useful life of more than one year. Such assets are recorded at historical cost. Donated capital assets are recorded at estimated acquisition value at the date of the donation. The Federal Government has a reversionary interest in those assets purchased with its funds which have a cost of \$5,000 or more and an estimated useful life of at least one year. Depreciation of capital assets is computed using the straight-line method over estimated useful lives as follows:

Assets	Years
Computer Equipment	5
Furniture	7

(h) **Federal income taxes**— Income taxes are not provided for in the financial statements since the Organization is exempt from federal and state income taxes under Section 501(c)(3) of the Internal Revenue Code and similar state provisions. Management is not aware of any activities that would jeopardize the Organization’s tax exempt status. The Organization is not aware of any tax positions it has taken that are subject to a significant degree of uncertainty. Tax years for the past three years remain subject to examination by taxing authorities.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**NOTES TO FINANCIAL STATEMENTS**  
**JUNE 30, 2024**

(1) **Summary of Significant Accounting Policies:** (Continued)

(i) **Accrued leave**—It is the Organization’s policy to allow employees upon separation of employment, other than for cause, to be compensated up to 240 hours of accrued leave at their regular hourly rate of pay, conditional upon availability of funding. The Organization’s liability for compensated absences of their employees was \$235,471, at June 30, 2024.

(j) **Cash and cash equivalents**— For the purpose of reporting cash flows, cash and cash equivalents include cash on hand, demand deposits due from banks, and short-term investments with an original maturity of 90 days or less.

(k) **Certificate of deposit**—The Organization maintains three certificates of deposit with federally insured banks. They are valued at cost plus accrued interest and mature in 2025.

(l) **Prepaid expenses**— Prepaid expenses consist of participant transportation cards used by the Organization’s clients. These expenses are recognized as they are incurred.

(m) **Recent accounting pronouncements**—The FASB and other entities issued new or modifications to, or interpretations of, existing accounting guidance during 2024. The Organization has considered the new pronouncements that altered accounting principles generally accepted in the United States of America, and other than as disclosed in the notes to the financial statements, does not believe that any other new or modified principles will have a material impact on the Organization’s reported financial position or operations in the near term.

(2) **2023 Presentation:**

The accompanying financial statements include certain prior year summarized comparative information in total. Such information does not include sufficient detail to constitute a presentation in conformity with accounting principles generally accepted in the United States. Accordingly, such information should be read in conjunction with the Organization’s financial statements for the year ended June 30, 2023, from which the summarized information was derived.

(3) **Subsequent Events:**

Management has performed an analysis of the activities and transactions subsequent to June 30, 2024, to determine the need for any adjustments to and/or disclosures within the audited financial statements for the year ended June 30, 2024. Management has performed their analysis through January 1, 2030, the date the financial statements were available to be issued.

**SUNCOAST WORKFORCE BOARD, INC.**  
**D/B/A CAREERSOURCE SUNCOAST**  
**NOTES TO FINANCIAL STATEMENTS**  
**JUNE 30, 2024**

(4) **Employee Benefits:**

The Organization offers a tax-deferred savings plan, which qualifies as a voluntary contribution savings plan under Internal Revenue Code Section 401(k). Employees may provide tax-deferred contributions to fully-vested individual retirement accounts up to the Internal Revenue Code limit. The plan covers all employees over age twenty and one-half and after six months of continuous employment. The Organization makes discretionary contributions based on eligible employee wages. Employees are immediately vested in salary deferral contributions and become vested in employer matching and discretionary profit-sharing contributions in accordance with a schedule of years of service. Total expense recorded for the Organization's match was \$202,631 for the year ended June 30, 2024.

(5) **Concentration of Credit Risk and Significant Funding Source:**

(a) **Cash and cash equivalents**—At June 30, 2024, the Organization had demand and time deposits with multiple financial institutions of \$1,525,303. The bank balance of these demand and time deposits was \$1,246,178 at June 30, 2023. The Organization has no policy requiring collateral or other security to support its deposits, although all demand and time deposits with banks are federally insured up to FDIC limitations. The demand and time deposits with the financial institutions are insured up to \$250,000.

(b) **Grants receivable**—The Organization's receivables are for amounts due under contracts with the State of Florida and Federal government agencies. The Board has no policy requiring collateral or other security to support its receivables.

(c) **Significant funding source**—During the year ended June 30, 2024, the Organization received approximately 90% of its funding from the United States Department of Labor, the United States Department of Health and Human Services, and the United States Department of Agriculture passed through the Florida Department of Commerce. If a significant reduction in the level of this funding were to occur, it could have an adverse effect on the Organization's program and activities.

(6) **Related Parties Transactions:**

In accordance with applicable regulations, the Organization's board of directors includes representatives of private and public sector industries. During the fiscal year ended June 30, 2024, the Organization entered into contracts with certain private and public sector industries, with which certain board members associated, for the purpose of providing services to participants. During the year ended June 30, 2024, total payments for providing training to participants were \$340,885 and total payments for dues and outreach payments were \$58,213. There were no accounts payable to related parties at June 30, 2024.



**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2024**

**(7) Indirect Costs:**

The Organization records costs that can be directly identified as benefiting a specific WIOA, TANF, or DOC Joint Managed Programs funding stream as direct expenses of the related program. Certain costs which are directly shared, have been allocated to programs based upon the relative benefit received. The Organization allocates indirect costs that cannot be identified as benefiting a specific program. Indirect costs are allocated to benefiting programs based upon an indirect cost rate approved by the Florida Department of Commerce. The following is a table of cost allocation methodologies for expenditures which are allocated:

<b>Expense</b>	<b>Method of Allocation</b>
Salaries and benefits	Time and effort
Facilities costs and rent	Full time employees located in the facilities
Staff training, dues, subscriptions, insurance, consultants, travel, and supplies	Allocated directly to the benefiting program or the appropriate indirect cost pool
Equipment	Charged directly or directly allocated to benefiting programs
Accounting, advertising, legal	Charged to the appropriate indirect pool unless the service can be directly tied to a grant
Auditing and monitoring	Allocated based upon relative expenditures of the grants audited and monitored
Service provider contracts	Directly allocated to programs or by the relative time the provider spent on the programs

**(8) Property Leased to Others:**

During the year ended June 30, 2024, the Organization recognized rental income from properties leased to others in the amount of \$11,203. The following is a schedule of future rentals under non-cancellable operating leases at June 30, 2024. Leases have an annual non-cancellable term and will be on a month to month basis upon expiration unless renewed. The amounts reflected below may differ from actual future rental income due to new leases entered into, the expiration of existing leases, or the recognition of rental income resulting from escalators, if any:

<b>Year Ending June 30,</b>	<b>Rental Revenue</b>
2025	\$ 3,954

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2024**

**(9) Liquidity and Availability:**

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the statement of the statement of financial position date, comprise the following:

Cash and cash equivalents	\$ 1,025,294
Certificates of deposit	500,009
Grants receivable	72,359
Total	<u>\$ 1,597,662</u>

The Organization has \$1,597,662 of financial assets available within one year of the statement of financial position date. None of these assets are subject to donor or other contractual restrictions that make them unavailable for general expenditure within one year of the statement of financial position date. The Florida Department of Commerce allows the Organization to request cash draws approximate to amounts necessary for pending disbursements for two weeks of cash needs.

**(10) Contingencies:**

Amounts received or receivable from grantor agencies are subject to audit and adjustment by grantor agencies, principally the Federal government and the State of Florida. Any disallowed claims, including amounts already collected, may constitute a liability of the applicable funds. The amount, if any, of expenditures which may be disallowed by the grantor cannot be determined at this time although the Organization expects such amounts, if any, to be immaterial.

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS  
FOR THE YEAR ENDED JUNE 30, 2024**

Federal Grantor/Pass-Through Entity/ Federal Program or Cluster Title	Federal Assistance Listing Number	Pass-Through Entity Identification Number	Federal Expenditures	Amount to Subrecipients
<b>United States Department of Labor</b>				
Passed through the State of Florida, Department of Commerce:				
Employment Service Cluster:				
Employment Service/Wagner-Peyser Funded Activities	17.207	WPA23	\$ 46,552	\$ -
Employment Service/Wagner-Peyser Funded Activities	17.207	WPA24	564,806	-
Employment Service/Wagner-Peyser Funded Activities	17.207	WPB24	107,614	-
Local Veterans' Employment Representatives (LVER)	17.801	LVR23	28,881	-
Local Veterans' Employment Representatives (LVER)	17.801	LVR24	44,937	-
Disable Veterans' Outreach Program (DVOP)	17.801	DVP23	28,970	-
Disable Veterans' Outreach Program (DVOP)	17.801	DVP24	31,401	-
Total Employment Service Cluster			853,161	-
Trade Adjustment Assistance	17.245	TAC21	7	-
Trade Adjustment Assistance	17.245	TAT21	200	-
Trade Adjustment Assistance	17.245	TAC22	28	-
Total Trade Adjustment Assistance			235	-
Unemployment Insurance	17.225	UCR22	213,226	-
Unemployment Insurance	17.225	UCR23	2,500	-
Total Unemployment Insurance			215,726	-
COVID 19 National Emergency Grants	17.277	WNC20	206,197	-
National Emergency Grants	17.277	WNI23	1,222,697	-
Total National Emergency Grants			1,428,894	-
Workforce Innovation and Opportunity Act Cluster:				
WIOA Adult Program	17.258	WIA24	729,226	3,081
WIOA Adult Program	17.258	WIS24	3,748	-
WIOA Youth Activities	17.259	WIY23	393,013	700
WIOA Youth Activities	17.259	WIY24	273,027	1,340
WIOA Youth Activities	17.259	WIS24	3,635	-
WIOA Dislocated Worker Formulas Grants	17.278	WID23	235,633	1,329
WIOA Dislocated Worker Formulas Grants	17.278	WRS22	363,533	-
WIOA Dislocated Worker Formulas Grants	17.278	WIR24	125,620	-
WIOA Dislocated Worker Formulas Grants	17.278	WID24	674,084	4,806
WIOA Dislocated Worker Formulas Grants	17.278	WRS23	36,064	-
WIOA Dislocated Worker Formulas Grants	17.278	WIS24	3,975	-
Total Workforce Innovation and Opportunity Act Cluster			2,841,558	11,256
<b>Total United States Department of Labor</b>			<b>5,339,574</b>	<b>11,256</b>
<b>U.S. Department of Agriculture</b>				
Passed through the State of Florida, Department of Commerce:				
Supplemental Nutrition Assistance Program Cluster:				
Supplemental Nutrition Assistance Program	10.561	FWFLP	33,379	877
Supplemental Nutrition Assistance Program	10.561	FWFLP	49,964	2,280
Total Supplemental Nutrition Assistance Program Cluster			83,343	3,157
<b>U.S. Department of Health and Human Services</b>				
Passed through the State of Florida, Department of Commerce:				
Temporary Assistance for Needy Families	93.558	WTS23	658,560	20,587
Temporary Assistance for Needy Families	93.558	WTS24	1,065,317	-
Total Temporary Assistance for Needy Families			1,723,877	20,587
<b>TOTAL EXPENDITURES OF FEDERAL AWARDS</b>			<b>\$ 7,146,794</b>	<b>\$ 35,000</b>

The accompanying notes to schedule of expenditures of federal awards are an integral part of this schedule.

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
NOTES TO SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS  
YEAR ENDED JUNE 30, 2024**

(1) **Basis of Presentation:**

The accompanying Schedule of Expenditures of Federal Awards includes the Federal award activity of Suncoast Workforce Board, Inc. (the Organization) and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Therefore, some amounts presented in this schedule may differ from amounts presented in, or used in the preparation of, the financial statements.

(2) **Summary of Significant Accounting Policies:**

Expenditures reported on the schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowed or are limited as to reimbursement.

(3) **De Minimis Indirect Cost Rate Election:**

The Organization has elected not to use the 10 percent de minimis indirect cost rate as allowed under Uniform Guidance.

**INDEPENDENT AUDITORS' REPORT ON INTERNAL CONTROL OVER  
FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS  
BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE  
WITH GOVERNMENT AUDITING STANDARDS**

To the Board of Directors,  
Suncoast Workforce Board, Inc.  
d/b/a CareerSource Suncoast

We have audited, in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, the financial statements of the Suncoast Workforce Board, Inc., (the Organization) which comprise the statement of financial position as of June 30, 2024, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements, and have issued our report thereon dated January 1, 2030.

**Report on Internal Control over Financial Reporting**

In planning and performing our audit of the financial statements, we considered the Organization's internal control over financial reporting (internal control) as a basis for designing audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

## **Report on Compliance and Other Matters**

As part of obtaining reasonable assurance about whether the Organization's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

### **Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

James Moore & Co., P.L.

Tallahassee, Florida  
January 1, 2030

**INDEPENDENT AUDITORS' REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE IN ACCORDANCE WITH THE UNIFORM GUIDANCE**

To the Board of Directors,  
Suncoast Workforce Board, Inc.  
d/b/a CareerSource Suncoast

**Report on Compliance for Each Major Federal Program**

***Opinion on Each Major Federal Program***

We have audited Suncoast Workforce Board, Inc. d/b/a CareerSource Suncoast (“the Organization”)’s compliance with the types of compliance requirements described in the OMB *Compliance Supplement* that could have a direct and material effect on each of the Organization’s major federal programs for the year ended June 30, 2024. The Organization’s major federal programs are identified in the summary of auditors’ results section of the accompanying schedule of findings and questioned costs.

In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2024.

***Basis for Opinion on Each Major Federal Program***

We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America (GAAS); the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States (*Government Auditing Standards*); the special audit guidance provided by the State of Florida Department of Commerce and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Our responsibilities under those standards and the Uniform Guidance are further described in the Auditors’ Responsibilities for the Audit of Compliance section of our report.

We are required to be independent of the Organization and to meet our other ethical responsibilities, in accordance with relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion on compliance for each major federal program. Our audit does not provide a legal determination of the Organization’s compliance with the compliance requirements referred to above.

***Responsibilities of Management for Compliance***

Management is responsible for compliance with the requirements referred to above and for the design, implementation, and maintenance of effective internal control over compliance with the requirements of laws, statutes, regulations, rules and provisions of contracts or grant agreements applicable to the Organization’s federal programs.

### ***Auditors' Responsibilities for the Audit of Compliance***

Our objectives are to obtain reasonable assurance about whether material noncompliance with the compliance requirements referred to above occurred, whether due to fraud or error, and express an opinion on the Organization's compliance based on our audit. 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, *Government Auditing Standards* and the Uniform Guidance will always detect material noncompliance when it exists. The risk of not detecting material noncompliance resulting from fraud is higher than for that resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Noncompliance with the compliance requirements referred to above is considered material, if there is a substantial likelihood that, individually or in the aggregate, it would influence the judgment made by a reasonable user of the report on compliance about the Organization's compliance with the requirements of each major federal program as a whole.

In performing an audit in accordance with GAAS, *Government Auditing Standards* and Uniform Guidance, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material noncompliance, 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 Organization's compliance with the compliance requirements referred to above and performing such other procedures as we considered necessary in the circumstances.
- Obtain an understanding of the Organization's internal control over compliance relevant to the audit in order to design audit procedures that are appropriate in the circumstances and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control over compliance. Accordingly, no such opinion is expressed.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and any significant deficiencies and material weaknesses in internal control over compliance that we identified during the audit.

### **Report on Internal Control Over Compliance**

Our consideration of internal control over compliance was for the limited purpose described in the Auditors' Responsibilities for the Audit of Compliance section above and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies in internal control over compliance and therefore, material weaknesses or significant deficiencies may exist that were not identified. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, as discussed in the accompanying schedule of findings and questioned costs, we did identify certain deficiencies in internal control over compliance that we consider to be significant deficiencies.

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a



deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance. We consider the deficiency in internal control over compliance described in the accompanying schedule of findings and questioned costs as item 2024-001 to be a significant deficiency.

Our audit was not designed for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, no such opinion is expressed. *Government Auditing Standards* requires the auditor to perform limited procedures on the Organization's response to the internal control over compliance findings identified in our audit described in the accompanying schedule of findings and questioned costs. The Organization's response was not subjected to the other auditing procedures applied in the audit of compliance and, accordingly, we express no opinion on the response.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

James Moore & Co., P.L.

Tallahassee, Florida  
January 1, 2030

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
SCHEDULE OF FINDINGS AND QUESTIONED COSTS  
FOR THE YEAR ENDED JUNE 30, 2024**

**I. Summary of Auditors' Results:**

***Financial Statements:***

Type of audit report issued on the financial statements: *Unmodified*

Internal control over financial reporting:

Material weakness(es) identified?  yes  no

Significant deficiency(ies) identified?  yes  none reported

Noncompliance material to financial statements noted?  yes  no

***Federal Awards:***

Internal control over major Federal programs:

Material weakness(es) identified?  yes  no

Significant deficiency(ies) identified?  yes  none reported

Type of auditors' report issued on compliance for major Federal programs: *Unmodified*

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)?  yes  no

Identification of major Federal programs:

<u>Assistance Listing Number(s)</u>	<u>Program Name/Cluster</u>
17.277	National Emergency Grant
93.558	Temporary Assistance for Needy Families
Dollar threshold used to distinguish between type A and type B Federal programs:	\$750,000
Auditee qualified as low-risk auditee?	<input checked="" type="checkbox"/> yes <input type="checkbox"/> No

**II. Financial Statement Findings: None.**

**III. Federal Awards Findings and Questioned Costs:**

**2024-01 – Information on the Federal Program: ALN 93.558 – Temporary Assistance for Needy Families – WTS23/24 – Compliance Requirement: Activities Allowed – Control Finding: Improperly Approved Disbursements**

*Criteria:* The Organization has established internal controls pertaining to disbursement requirements. For any disbursements made by the Organization which exceed \$10,000, it is a requirement for there to be two signors from the established list of approved check/disbursement signors.

**SUNCOAST WORKFORCE BOARD, INC.  
D/B/A CAREERSOURCE SUNCOAST  
SCHEDULE OF FINDINGS AND QUESTIONED COSTS  
FOR THE YEAR ENDED JUNE 30, 2024  
(CONTINUED)**

*Condition:* For two disbursements tested out of 40, both of which exceeded \$10,000, the Organization did not obtain the required second signature prior to disbursement.

*Cause:* The requirement to perform these control elements was not followed by the Organization.

*Effect:* The disbursements which were not properly completed in accordance with documented internal controls could result in improperly approved disbursements relating to grant agreements.

*Recommendation:* We recommend that the Organization follow the disbursement guidelines as set forth in their internal controls to ensure disbursements are properly approved before disbursement occurs.

- IV. **State of Florida, Department of Commerce (DOC) Reporting Requirements:** The Organization performed timely reconciliations between the general ledger accounting system and the Subrecipient Enterprise Resource Application maintained by DOC. Also, based on the DOC reporting requirements, there were no additional findings required to be reported in fiscal year 2024.
- V. **Federal Award Summary Schedule of Prior Year Findings:** There were no audit findings for the year ended June 30, 2023.
- VI. **Corrective Action Plan:** See the Organization's Response to Findings on page 24.



David Kraft  
*Chair*

Lisa Eding  
*Vice Chair*

Jim Bos  
*Treasurer*

Joshua Matlock  
*President & CEO*

December 12, 2024

## MANAGEMENT'S RESPONSE TO FINDING

The Schedule of Findings and Questioned Costs provided comments and recommendations for improved financial management accounting procedures. The following is Management's response to the finding. The Auditors' comment number and description is included as a reference.

### **2024-01 – Information on the Federal Program: ALN 93.558 – Temporary Assistance for Needy Families – WTS 23/24 – Compliance Requirement: Activities Allowed – Control Finding: Improperly Approved Disbursements**

This finding recommends the Organization follow the disbursement guideline for second check signature for disbursements \$10,000 or more. The organization will manually review disbursements of \$10,000 or more before they go out for a second signature. In addition, the organization reviewed check registers for program year 2023 – 2024 and program year 2024-2025 as of December 2024 and verified disbursements \$10,000 or more were supported with two signatures. There were no additional discrepancies found.

*Joshua Matlock*

Joshua Matlock (Dec 12, 2024 18:35 EST)

Joshua Matlock  
President/CEO



**ACTION ITEM -  
Meeting  
Minutes**

**CAREERSOURCE SUNCOAST**  
**Combined Executive Committee and Board Meeting Minutes**  
Virtual TEAMS Meeting and In-person  
3660 N. Washington Blvd., Sarasota, FL 34234  
Thursday, November 14, 2024  
8:00 A.M.

**Call to Order**

David Kraft, Chair, called the meeting to order at 8:02 a.m. Roll call was performed, and a quorum was established.

**Board Member Committee Updates – David Kraft**

Finance and Performance Committee appointments were announced.

- Ericka Randall – Vocational Rehabilitation
- Lorri Kidder – Carr, Riggs, Ingram

**Action Items – David Kraft, Chair**

- **Approval of October 3, 2024 Board Meeting Minutes - David Kraft**

David Kraft requested a motion to approve the October 3, 2024 Board Meeting Minutes.

**Motion: Lisa Eding                      Second: Eric Troyer**  
**Motion passed unanimously**

- **Approval of Transfer of Funds from Dislocated Worker to Adult – Robin Dawson**  
Robin Dawson presented the request to transfer funds. The transfer request document was provided in the meeting materials.

**Motion: Jim Bos                      Second: Lisa Eding**  
**Motion passed unanimously**

- **Approval of Budget Modification #1 PY 2024/25 – Jim Bos**

Jim Bos introduced the budget modification approved by the Finance and Performance Committee on November 12, 2024. Budget Modification information was provided in the meeting materials. Robin Dawson reviewed the Budget Modification and requested a motion to approve Budget Modification #1 for PY 2024/2025.

**Motion: Jim Bos                      Second: Allison Imre**  
**Motion passed unanimously**

- **Approval of CareerSource Suncoast Bylaws – Christina Witt**

Christina Witt provided an overview of CSS Bylaws revision. A copy of the mark-up version and a clean version of the bylaws were provided in the meeting materials. Christina Witt requested a motion to approve the revised CSS Bylaws presented to the Board of Directors.

**Motion: Eric Troyer                      Second: Lisa Eding**  
**Motion passed unanimously**

- **Approval of Related Party Expenditures with the Community Coalition of the Homeless, dba Turning Points - Christina Witt**

Christina Witt presented the related party approval.

The Conflict of interest requiring approval was verbally stated at the meeting; David Kraft, CSS Board Chair, is a Volunteer Board of Directors Member for the Community Coalition of the Homeless, dba Turning Points non-profit organization.

David Kraft abstained from discussion and voting.

The request presented for approval was for client on-the-job training (OJT) and worksite host agreements. OJT provider agreements allow CareerSource Suncoast enrolled clients to be placed with the organization in work-based training.

Christina Witt requested a motion to approve the related party expenditures with the Community Coalition of the Homeless, dba Turning with a \$30,000 maximum for PY2024-2025 for work-based training and worksite host agreements.

**Motion: Jim Bos                      Second: Will Cromie**  
**Abstain: David Kraft**  
**Motion passed with majority.**

**Other Board Business:**

- **FloridaCommerce Annual Performance Presentation PY 22-23**

FloridaCommerce staff presented the PY 2022-2023 performance to the Board of Directors.

- **Education and Industry Consortium Report**

Terri Clark, TClark Workforce Solutions, LLC., presented the quarterly report for the Education and Industry Consortium.

- **Finance and Performance Committee Report**

Jim Bos provided an overview of the Finance & Performance Committee meeting from November 12, 2024. Robin Dawson, VP/CFAO, reviewed the following reports. Copies of the reports were provided in the meeting materials.

- Review of Budget to Expenditure Report as of September 30, 2024
- Budget to Expenditure Report by Fundsource as of September 30, 2024
- Summary of Non-Federal Funds Revenue & Expenditures as of September 30, 2024

Robin Dawson reviewed the FloridaCommerce Financial Monitoring report for PY2023. There were no findings or observations noted in the monitoring report. A copy of the report was provided in the meeting materials.

**Performance Update:**

Joshua Matlock reviewed the final CSS WIOA Performance Indicators for PY2023-2024. A copy of the performance results was provided in the meeting materials.

CSS PY2023-2024 final letter grade was an “A-” with a score of 91.02%. A copy of the letter grade was provided in the meeting materials.

**CEO Report:**

Joshua Matlock provided an update on hurricane recovery efforts. Overall disaster recovery between the local boards, the state and the county has improved. CSS has received \$200,000 of the requested \$4.5 million requested for the National Emergency Dislocated Worker Grants. Additional funds are pending approval at the Federal level. This week, CSS met with the University of Florida aquaculture department to begin coordination on disaster recovery at the local aquaculture farms.

The Florida Workforce Development Association will be focusing on advocacy at the State and Federal level, focusing on legislation that impacts the local workforce board’s budget allocations and ability to continue to provide services.

James Disbro shared that he was invited to Washington DC. to speak at a conference regarding the apprenticeship efforts CSS has implemented.

**Public Comments:** None

**Next Meeting:**

Next Board of Directors Meeting is January 23, 2025

Location: 3660 N. Washington Blvd, Sarasota, FL

**Full Board Meeting Adjournment:**

The meeting was adjourned at 9:13 a.m.

Respectfully submitted,



Joshua Matlock (Dec 16, 2024 13:28 EST)

Joshua Matlock

President, CEO



**CAREERSOURCE SUNCOAST - BOARD MEETING ATTENDANCE**

Absent Present	Board Member
P	Jim Bos, MBJ Group
P*	Ashley Brown, Women’s Resource Center
P	Will Cromie, Synovus Bank
P*	Jackie Dezelski, Manatee Chamber of Commerce
A	Dr. Ron DiPillo, Sarasota County Schools
A	Kathy Dwyer, Galen College of Nursing
P	Lisa Eding, Teak Decking Systems
A	Luis Font, LIUNA, Laborers International Union
A	Geoffry Gilot, Boys & Girls Clubs
P	Vaughn Alexander Hendriex, State College of Florida
A	Sharon Hillstrom, Bradenton Area Economic Development Corporation
P*	Allison Imre, Grapevine Communications
P*	Heather Kasten, Sarasota Chamber of Commerce
P*	Lori Kidder, Carr Riggs, & Ingram, LLC.
P	David Kraft, Vision Consulting Group
A	Anne LeBaron, Take Stock in Children Manatee
A	Shaun Polasky, Helios Technologies
P*	Ericka Randall, Vocational Rehabilitation
P*	Jane Roseboro, Centerstone Florida
P*	Sarah Tar, Truist
P	Eric Troyer, Kerkering Barberio & Company
A	Mark Viggiano, Local 123 Plumbers, and Pipefitters Union
P*	Doug Wagner, Manatee County School Board
P*	Craig Warzecha, Bradenton Marauders/Pittsburgh Pirates
A	Ken Waters, Sarasota Housing Authority
	Staff Present: Josh Matlock, Robin Dawson, Kathy Bouchard*, Karima Hability*, Linda Benedict, Christina Witt, Michelle Snyder*, James Disbro*, Chet Filanowski*, Michael Meerman*, Curt Preisser*
P*	Commissioner George Kruse - Manatee County
A	Commissioner Ron Cutsinger – Sarasota County

25 Board Members – 16 present, 9 absent

*\*Virtual*

**CareerSource Suncoast  
Executive Committee  
Meeting Minutes**  
Teams Virtual Meeting  
Thursday November 14, 2024  
8:00 a.m.

<b>Absent Present</b>	<b><u>Committee Members</u></b>
P	David Kraft, Vision Consulting Group
A	Shaun Polasky, Helios Technologies
P	Eric Troyer, Kerkering, Barberio & Company
P	Jim Bos, MBJ Group
P	Lisa Eding, Teakdecking Systems
	Staff Present: Christina Witt

**I. Call to Order**

David Kraft, Chair, called the meeting to order at 9:23 a.m. Attendance was recorded, and a quorum was established.

**II. Action Items**

Approval of October 17, 2024 Executive Committee

David Kraft requested a motion to approve the October 17, 2024 Executive Committee meeting minutes.

**Motion:** Jim Bos **Second:** Eric Troyer

The motion passed unanimously.

President/CEO Performance Evaluation

The annual CEO performance evaluation was completed on November 14, 2024, by the Executive Committee. The evaluation reviewed five different areas: 1) Strategic development, 2) Board relations, 3) Serves as a change agent, 4) Risk taking / problem solving, and 5) Community leadership.

Rating key was as follows:

5 = Exceptional

3 = Meets expectations

1 = Below expectations

Overall rating scale is as follows:

4.50 – 5.00 = Exceptional performance

3.50 – 4.49 = Above expectations

3.00 – 3.49 = Meets expectations

2.50 – 2.99 = Needs improvement

2.49 and below = Unsatisfactory

The Executive Committee completed the President/CEO, Joshua Matlock's performance evaluation. There were no scores below 3.00, with an overall rating of 4.68, which indicates exceptional performance.

Approval of the President/CEO Compensation and Bonus – David Kraft

David Kraft led the discussion on the President/CEO bonus and compensation increase. Based on Joshua Matlock's performance evaluation, the Executive Committee determined an 8% salary increase, for a total compensation of \$155,455 to be effective next pay period, which begins November 24, 2024.

Additionally, based on the Executive Performance/Bonus Rubric, it was determined that Josh will receive a 4% discretionary bonus consistent with CSS PY2023-2024 letter grade of 91.02% (A-).

David Kraft requested a motion to approve the President/CEO compensation with an 8% increase, for a total compensation of \$155,455 effective November 24, 2024 and to receive a one-time 4% discretionary performance bonus.

Motion: Eric Troyer                      Second: Jim Bos  
The motion passed unanimously.

**III. Public Comment/Closing Remarks – David Kraft**

The committee recommends that the Chief Talent Officer be directly involved in the CEO review process and Executive Committee discussion in the future.

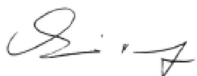
**IV. Adjournment – David Kraft**

Next Executive Committee meeting is scheduled for January 9, 2025 combined with Finance and Performance Committee meeting.

Location: Virtual Teams Meeting

David Kraft adjourned the meeting at 10:02 a.m.

**Respectfully submitted,**



David Kraft  
Chairman of the Board



# CEO Report



## OTHER BOARD BUSINESS -

One-Stop Operator  
and  
Education & Industry  
Consortium Report



## **One-Stop Operator Semi Annual Report to the Suncoast Workforce Board, INC dba CareerSource Suncoast January 23, 2025**

In July 2024, TClark Workforce Solutions, LLC. (TClark), was selected as the One-Stop Operator (OSO) for CareerSource Suncoast (CSS). This report is the first required semiannual Board report and addresses the scope of work for the program year beginning July 2024 through June 2025.

### **Introduction:**

Per **20 CFR 678.60**: At minimum, the one-stop operator must coordinate the service delivery of required one-stop partners and service providers. TClark Workforce Solutions, LLC. (TClark) under contract with Suncoast Workforce Board, Inc., dba CareerSource Suncoast (CSS) will facilitate coordination of one-stop center partners, including, at a minimum, the following responsibilities, as specified in the Request for Proposals:

1. Understand the mission, vision, and service delivery requirements of the required one-stop partners to strategically align with CSS priorities and services.
2. Develop, update, and track all memorandum of understandings (MOUs) and infrastructure funding agreements (IFAs) to maintain compliance with mandated partners. Ensuring timely execution of MOU's and IFA s with all mandated partners to prevent gaps in service delivery. All recommendations for shared costs, improvements, efficiencies, and modifications to current MOU's must be submitted in writing to the CSS One-Stop-Operator liaison.
3. Quarterly monitoring of mandated partner activity supporting the IFA. Providing blank quarterly infrastructure funding reports to each mandated partner prior to due dates. Ensure completed quarterly IFA reports are submitted by all mandated partners within forty-five (45) days after the completion of the previous quarter. Tracking and reporting on completed quarterly infrastructure funding reports submitted by mandated partners. Follow up with disengaged mandated partners to determine the cause, identify and initiate steps for reengagement with CSS one-stop centers.

4. Evaluate CSS Customer Satisfaction Survey results, providing quarterly reports on feedback received to include, number of surveys received and average score. Any recommendations for continuous improvement must be submitted in writing to the CSS One-Stop-Operator liaison.
5. Facilitate conversations and engagement with CSS mandated partners to support, increase and maintain the use of the Crosswalk – agency to agency referral system with the one stop center.
6. Convene virtual quarterly meetings with mandated partners to promote Crosswalk usage, share information, discuss strategies to positively impact employment outcomes for shared clients, and problem-solve collaboration issues. Based on mandated partner input the meetings may be held in person if there is a majority request to do so.
7. Work with CSS designated staff to support building relationships with the required partners of the one-stop centers, as defined by CSS, and track implementation of activities and collaborations as outlined in the MOUs. To provide, maintain, review, and monitor continuous improvement of the comprehensive one stop centers and cross-referring of clients. Written quarterly reports are to be submitted to the CSS One-Stop-Operator liaison within forty-five (45) days after the completion of the quarter.
8. With guidance from CSS, the sub-recipient shall prepare a summary report on the scope of services provided for the current program year for the January Board meeting, and year-end Board report in June. The summary report must be provided to the CSS liaison two weeks prior to Board meeting for review and distribution and include at minimum the following information.

## **Summary of Information Gathering Activities:**

### Leadership Meetings:

In Q1 and Q2 the One-Stop Operator (TClark) held meetings throughout both quarters with representatives from CareerSource Suncoast (CSS). The purpose of these meetings was to introduce the OSO to the leadership team, review contract deliverables, receive training on reporting and referral systems, and plan meeting facilitations to be held during the quarter.

### One-Stop Partner Meetings:

To understand the mission and vision of CareerSource Suncoast and execute service delivery requirements of the required one-stop partners, TClark held quarterly partner meetings via Teams. The 2024-2025 program year meeting schedule is August 28, 2024

(Q1), November 7, 2024 (Q2), February 19, 2025 (Q3), and June 4, 2025 (Q4: tentative). All meetings are from 1:00-2:00 PM. A standard meeting agenda includes:

- Welcome and Partner Introductions
- CareerSource Suncoast Updates
- Crosswalk Referral System
- Infrastructure Funding Agreements, Quarterly
- Partner Updates and Highlights

At the end of the meeting, a participation survey is provided via this link,

<https://forms.office.com/pages/responsepage.aspx?id=DQSIkWdsW0yxEjajBLZtrQAAAAA&AAAAAANAAXpvjahUMzVJVI&FOMzNOWVBKWWVhXVDdFR0NBMVpWNi4u&route=shorturl>

A copy of the survey is included at the end of this report.

#### Education and Industry Consortium:

Per **2023.09.19.A.2:** Section 445.007(15), Florida Statutes, requires each local workforce development board to create an education and industry consortium composed of representatives of educational entities and businesses in the designated workforce service delivery area.

TClark organized and facilitated the quarterly Education and Industry Consortium meetings in Q1 and Q2. The Q1 EIC meeting was held on September 18, 2024, and the Q2 EIC meeting was held on November 13, 2024, both via Teams. The meeting agendas are provided below, as well as, posted to the CareerSource Suncoast website at least one week prior to the meeting.

#### EIC Agenda for September 18, 2024 (Q3)

- Introductions - Terri Clark, TClark Workforce Solutions
- CEO Update - Joshua Matlock
- Discussion Items
  - Education and Industry Consortium Overview – Terri Clark
- Public Comments and Closing Remarks – Terri Clark
- Adjournment - Terri Clark

#### EIC Agenda November 13, 2024 (Q2)

- Introductions - Terri Clark, TClark Workforce Solutions
- Discussion Items
  - Education Partner Updates
  - Industry Partner Updates



- CareerSource Suncoast Updates
- Public Comments and Closing Remarks – Terri Clark
- Adjournment - Terri Clark

In addition to the local EIC meetings, TClark attended the ‘Education & Industry Consortium LWDB Quarterly Calls’ hosted by CareerSource Florida. This allowed TClark the opportunity to learn best practices and engage with other local workforce boards to enhance both education and industry opportunities within the Suncoast service region. These virtual meetings were held on October 7, 2024, and December 16, 2024.

#### Infrastructure Funding Agreements (IFA):

TClark facilitated the Q1 Infrastructure Funding Agreements (IFA) Report templates with the One Stop Mandated Partners via email using an Adobe Sign link,

[https://careersourcesc.na4.adobesign.com/public/esignWidget?wid=CBFCIBAA3AAABLblqZhCkvetfp3N6VHCKbwjelSEivcss\\_YaZTbh74-J6j2Z-AIRZrvNttYFXHvrYjQ1fsVE\\*](https://careersourcesc.na4.adobesign.com/public/esignWidget?wid=CBFCIBAA3AAABLblqZhCkvetfp3N6VHCKbwjelSEivcss_YaZTbh74-J6j2Z-AIRZrvNttYFXHvrYjQ1fsVE*)

This link is sent to the partner agencies at the beginning of each quarter and prior to the partner meeting. Time is set aside in the partner meeting for any questions related to completing the quarterly IFA reports. TClark reviews all completed and submitted IFA reports and follows up with CS Suncoast leadership staff on any reporting funding questions. TClark will send out Q2 Infrastructure Funding Agreements (IFA) Reports on January 2, 2025, after the quarter ends.

#### Crosswalk Referral System (CRS):

TClark promotes the Crosswalk Referral System (CRS) during the quarterly partners meeting and the Education and Industry Consortium meetings. By promoting and providing training, alongside CS Suncoast Leadership staff, we will continue to strengthen the number of agencies using the system, resulting in enhanced client outcomes. TClark received comprehensive Crosswalk Referral System training from James Disbro to ensure promotion and awareness of the system with training partners during Q1.

The table below indicates the number of referrals sent to other partnering agencies, number of referrals received to CareerSource Suncoast, and total referrals by month within the two-county service region during Q1 and Q2 of PY 2024-2025. The second table displays the monthly comparison of the same referrals for PY 2023-2024.

**Crosswalk Referral System Monthly Report PY 2024-2025:**

Month	Agency Referrals Sent	Agency Referrals Received	Total Referrals
July	9	77	86
August	10	78	88
September	13	67	80
October	6	42	48
November	2	23	25
December	5	11	16
<i>*As of time of report on 12/18</i>			
<b>TOTAL for Q1 &amp; Q2</b>	<b>45</b>	<b>298</b>	<b>343</b>

*\*Total referrals may include duplication of referrals.*

**Comparison of Crosswalk Referral System Monthly Report PY 2023-2024:**

Month	Agency Referrals Sent	Agency Referrals Received	Total Referrals
July	2	24	26
August	5	16	21
September	8	27	31
October	4	25	28
November	3	15	18
December	10	29	39
<b>TOTAL for Q1 &amp; Q2 (PY23-24)</b>	<b>32</b>	<b>136</b>	<b>163</b>

Comparing Q1 and Q2 data between PY 2023-2024 and PY 2024-2025, referrals have increased in each of the three categories. Therefore, further indicating the increased use of this referral system within CareerSource Suncoast and other partnering agencies.

<b>Agency Referrals Sent</b>	40%
<b>Agency Referrals Received</b>	119%
<b>Total Referrals</b>	110%

Recommendations for Consideration:

1. Continue to explore opportunities to increase the use of the Crosswalk Referral System (CRS) with all mandated partner agencies, business and industry, and local non-profits. In addition to increased engagement, offer user training quarterly or on

an as need basis. TClark can assist with coordinating the new-user training opportunities.

2. Consider incorporating non-mandated partners in the quarterly mandated partner meetings. TClark will work with CS Suncoast Leadership staff to identify suggested non-mandated partners to invite to upcoming meetings.

By submitting this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements, and cash receipts are for the purposed and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil, or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Section 3729-3730 and 3801-3812).

A handwritten signature in black ink that reads "Terri Clark". The signature is written in a cursive, flowing style.

Terri Clark

December 18, 2024

# One Stop Partner Meeting Survey

Thank you for your participation. The purpose of this questionnaire is to collect your feedback, which will help us improve partner meetings in the future. All information will remain confidential.

\* Required

1. Overall, how satisfied are you with the meeting? \*

Extremely dissatisfied ☆ ☆ ☆ ☆ ☆ Extremely satisfied

2. Is this your first time attending a One Stop Partner meeting? \*

Yes

No

3. How would you rate the following for the facilitator or trainer? \*

	Not well at all	Not very well	Somewhat well	Very well	Extremely well
Explained the purpose of the event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Presented concepts in a clear and easy-to-understand way	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintained my interest throughout the duration of the event	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Encouraged attendee participation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Thoroughly answered questions from participants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. How satisfied are you with the following aspects of the One Stop Partner meeting? \*

	Very dissatisfied	Somewhat dissatisfied	Neither satisfied nor dissatisfied	Somewhat satisfied	Very satisfied
Facilitator Role	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Content Provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Length /Time of Meeting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agenda was Organized	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Time management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. How could the event be improved? Suggestions? Follow up?

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Microsoft Forms



FINANCE  
AND  
PERFORMANCE  
COMMITTEE  
REPORT

**CAREERSOURCE SUNCOAST**  
**Finance & Performance Committee**  
**Board of Directors Summary**  
**January 23, 2025**

The Finance & Performance Committee met on January 9, 2024, combined with the Executive Committee meeting.

**Acceptance of the Financial Audit Report for Program Year Ending June 30, 2024:**

Ben Clark, James Moore & Co. presented the completed audit report for Program Year ending June 30, 2024. The report reflected no findings and no questioned costs were found. A copy of the audit report was provided in the agenda packet. The F&P Committee accepted the audit report.

**Performance Update:**

Anthony Gagliano reviewed the CSS WIOA Performance Indicators for the first quarter of program year 2024-25 as of 09/30/2024. A copy of the performance results was provided in the agenda packet.

**General Comments & Updates:**

Next meeting(s) of the Finance & Performance Committee is scheduled for February 18, 2025 at 10:00 a.m.

Respectfully Submitted,

Jim Bos  
CSS Treasurer

**LWDB 18**

Measures	PY2023-2024 4th Quarter Performance	PY2023-2024 % of Performance Goal Met For Q4	PY2023-2024 Performance Goals	PY2024-2025 1st Quarter Performance	PY2023-2024 % of Performance Goal Met For Q4	PY2024-2025 Performance Goals
<b>Adults:</b>						
Employed 2nd Qtr After Exit	87.30	96.36	90.60	85.2	99.07	86
Median Wage 2nd Quarter After Exit	\$10,033	107.29	\$9,351	\$10,199.50	111.57	\$9,142
Employed 4th Qtr After Exit	89.10	102.41	87.00	89.5	101.24	88.4
Credential Attainment Rate	76.90	98.59	78.00	80.9	105.06	77
Measurable Skill Gains	79.50	108.31	73.40	70.9	136.61	51.9
<b>Dislocated Workers:</b>						
Employed 2nd Qtr After Exit	83.30	107.35	77.60	87.5	105.42	83
Median Wage 2nd Quarter After Exit	\$9,920	98.43	\$10,078	\$9,639	90.93	\$10,600
Employed 4th Qtr After Exit	72.70	88.66	82.00	60	75.00	80
Credential Attainment Rate	66.70	114.21	58.40	72.7	145.40	50
Measurable Skill Gains	83.30	117.16	71.10	77.8	100.26	77.6
<b>Youth:</b>						
Employed 2nd Qtr After Exit	85.00	99.88	85.10	87.5	106.71	82
Median Wage 2nd Quarter After Exit	\$6,142	138.65	\$4,430	\$7,094	154.55	\$4,590
Employed 4th Qtr After Exit	81.00	94.19	86.00	71.4	89.25	80
Credential Attainment Rate	72.70	90.09	80.70	66.7	88.93	75
Measurable Skill Gains	93.30	137.21	68.00	56.5	75.33	75
<b>Wagner Peyser:</b>						
Employed 2nd Qtr After Exit	70.90	109.08	65.00	71.8	106.06	67.7
Median Wage 2nd Quarter After Exit	\$8,118	136.44	\$5,950	\$8,302	139.53	\$6,651
Employed 4th Qtr After Exit	69.40	109.29	63.50	69.5	109.45	63.7

Not Met (less than 90% of negotiated)
Met (90-100% of negotiated)
Exceeded (greater than 100% of negotiated)

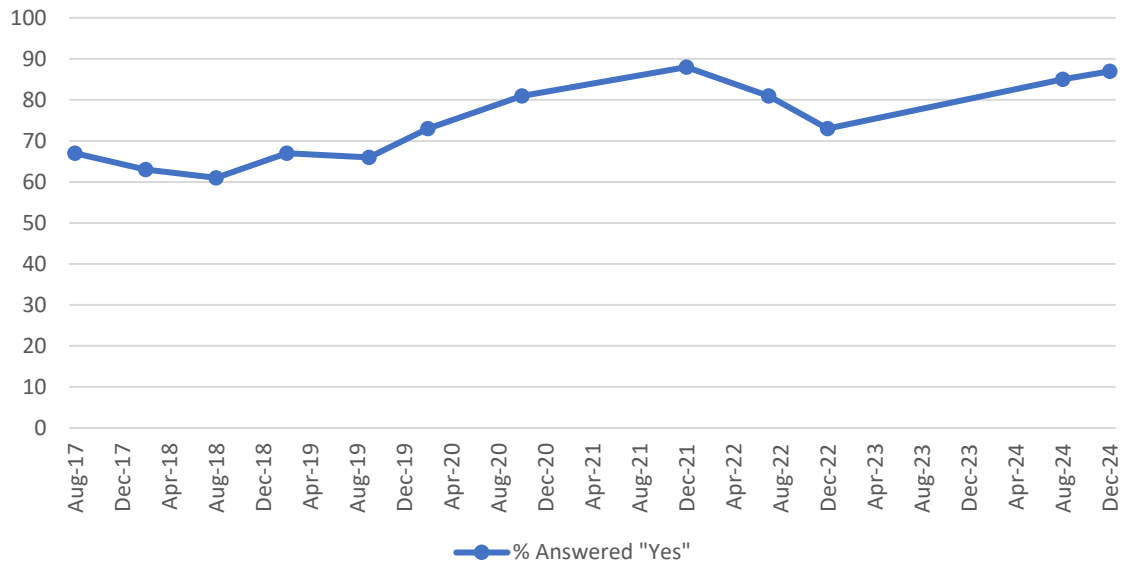




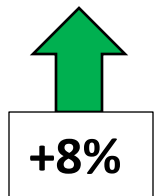
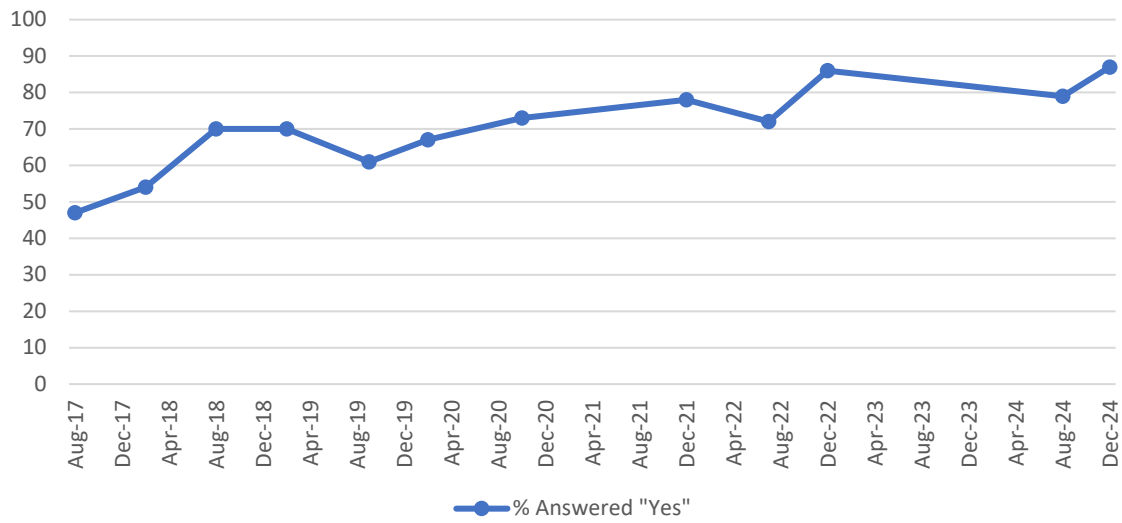
## STAFF REPORTS

- Kathy Bouchard, CTO
- Anthony Gagliano, COO

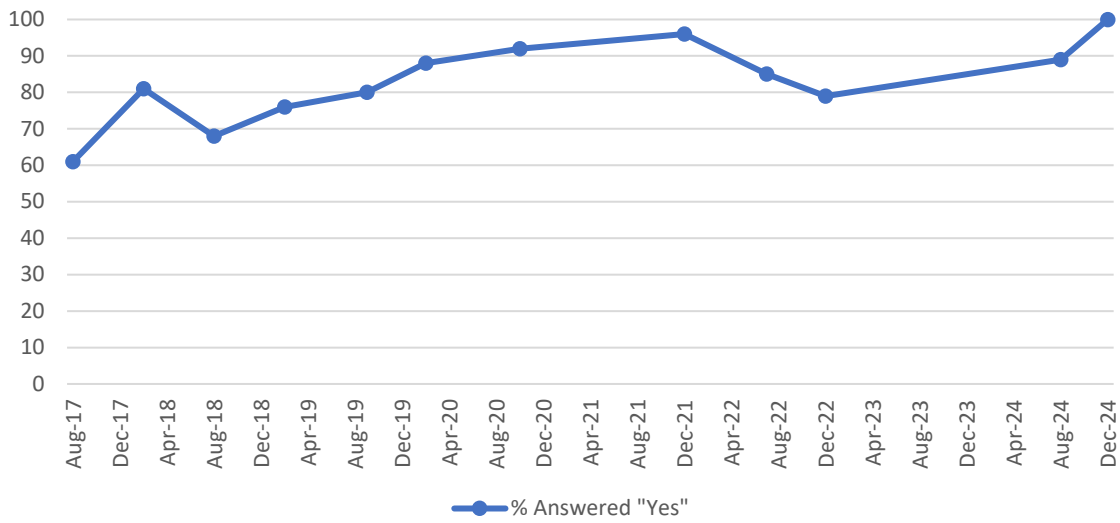
### 1. I get the coaching I need from my supervisor.




### 2. I receive the necessary training and information to do my job.

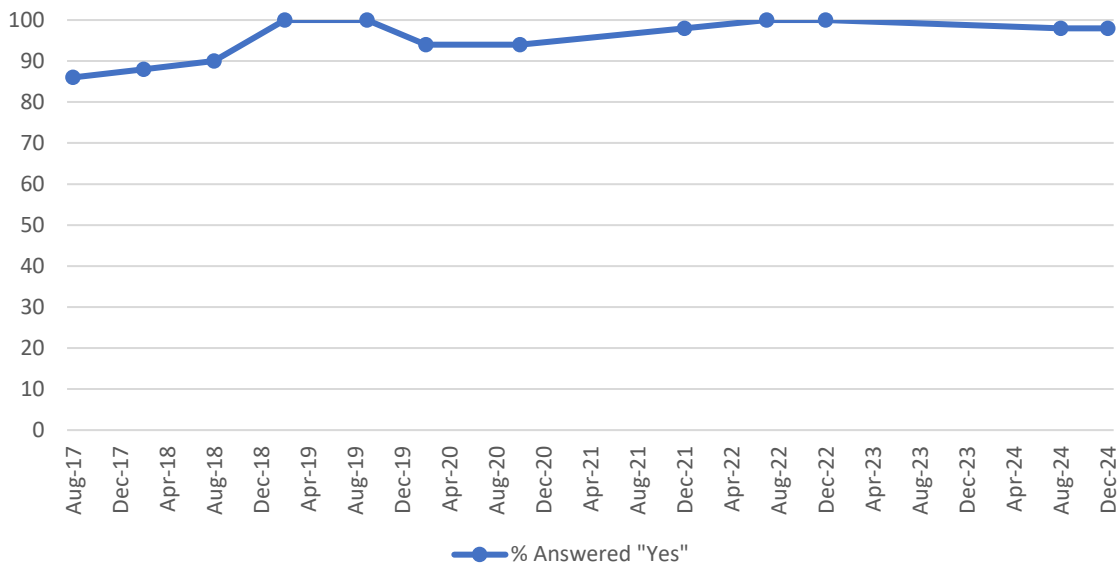


### 3. My supervisor/senior is available to assist me when I need help/guidance.

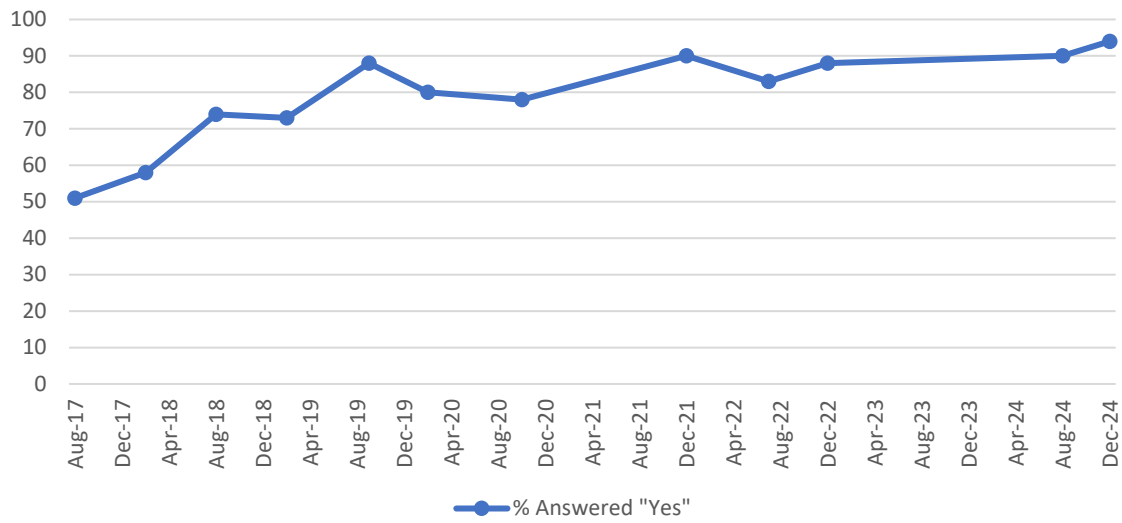


  
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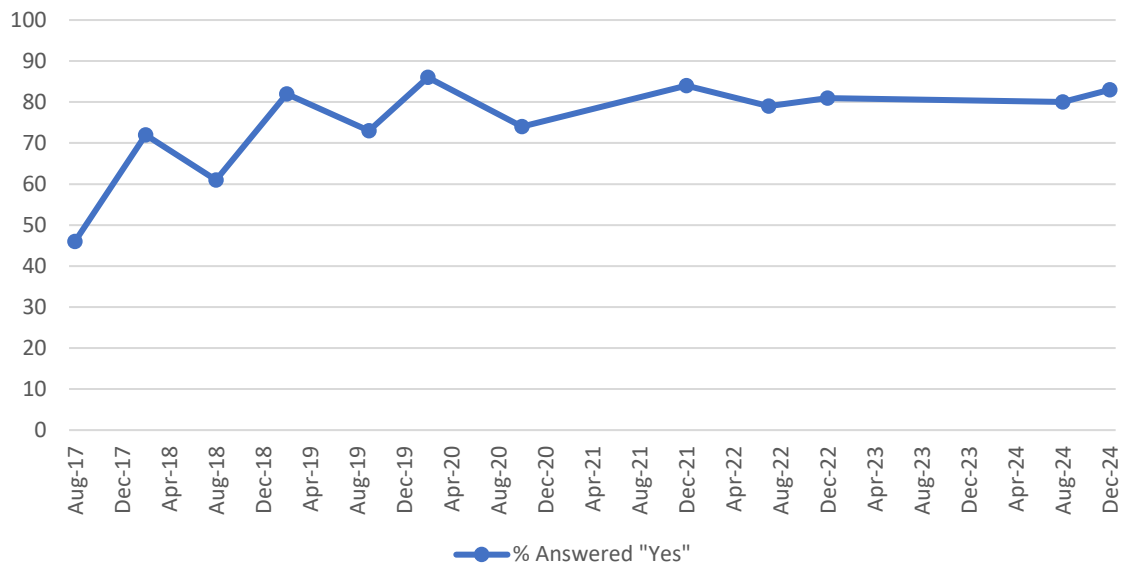
### 4. I can ask for help from my teammates.



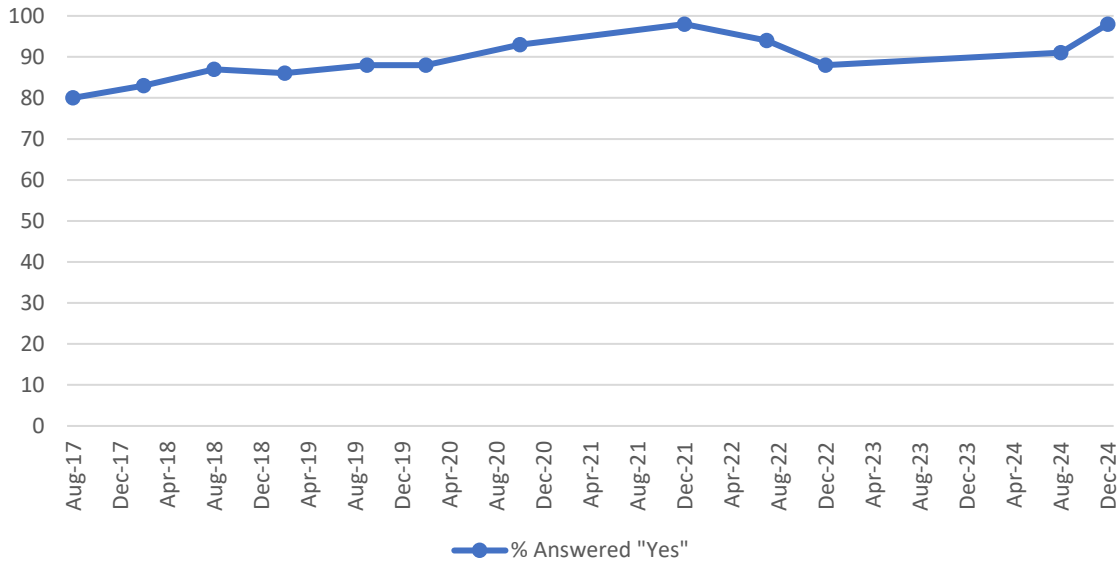
### 5. My supervisor shares information in a consistent and timely manner.



### 6. I have a clear understanding of my goals & expectations.

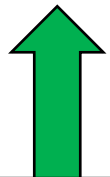
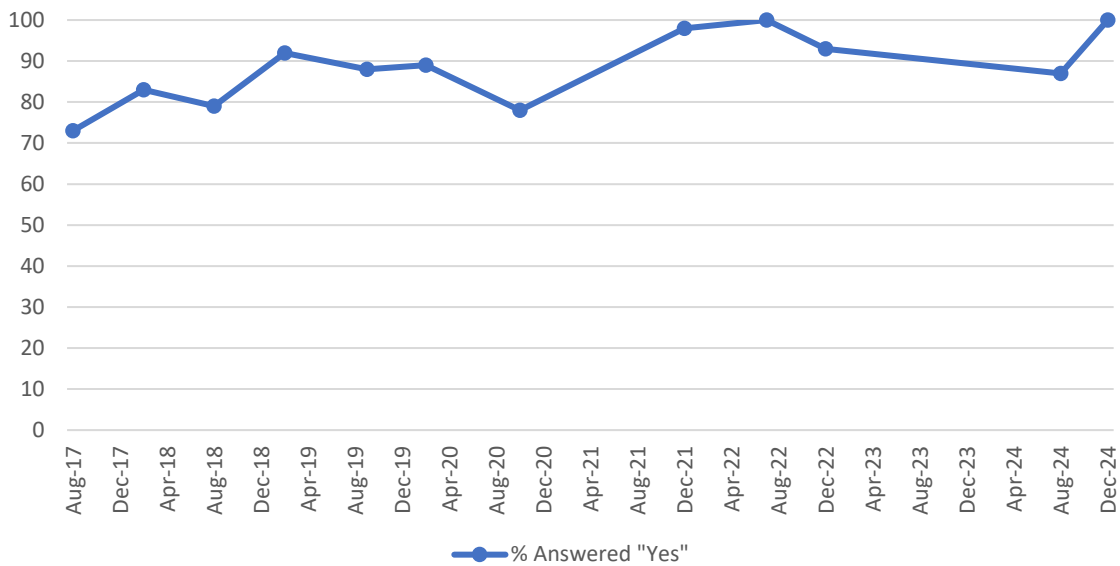


### 7. My supervisor appreciates me.



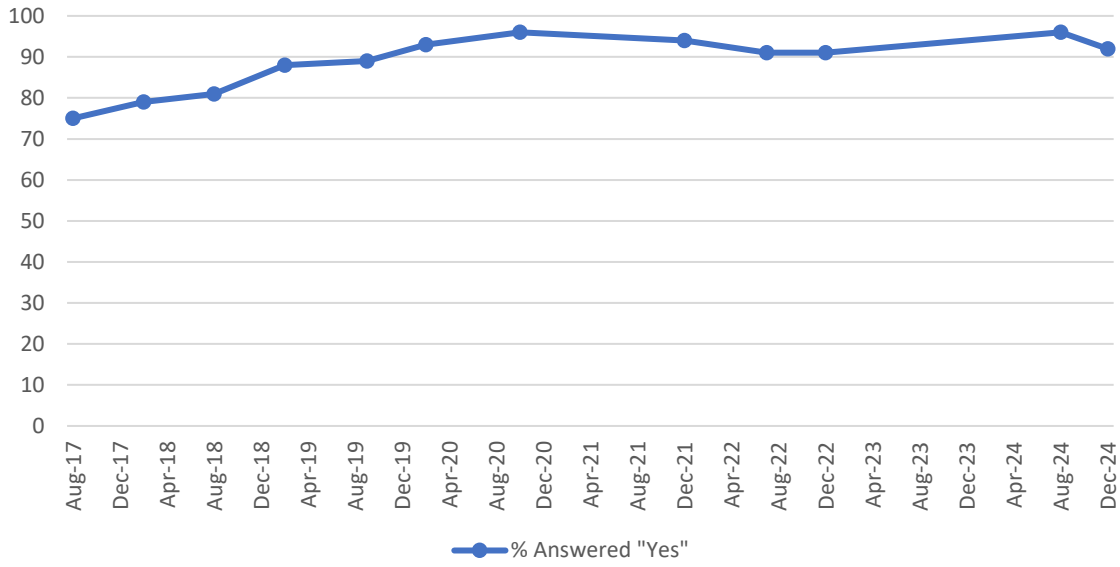
**+7%**

### 8. I feel connected to my team.

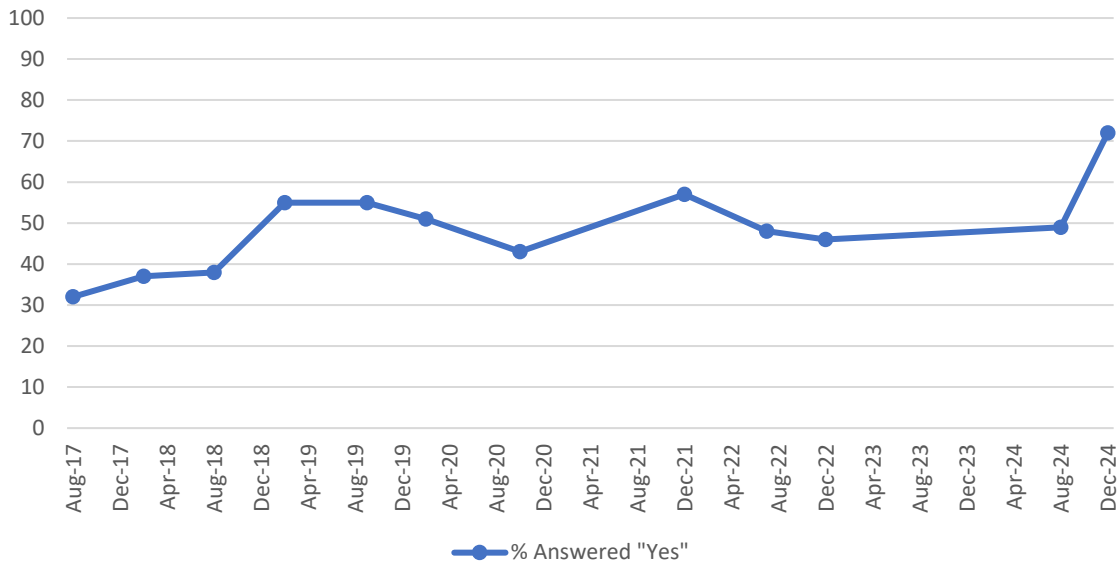


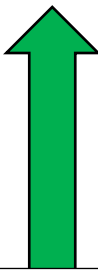
**+13%**

### 9. I enjoy coming to work.

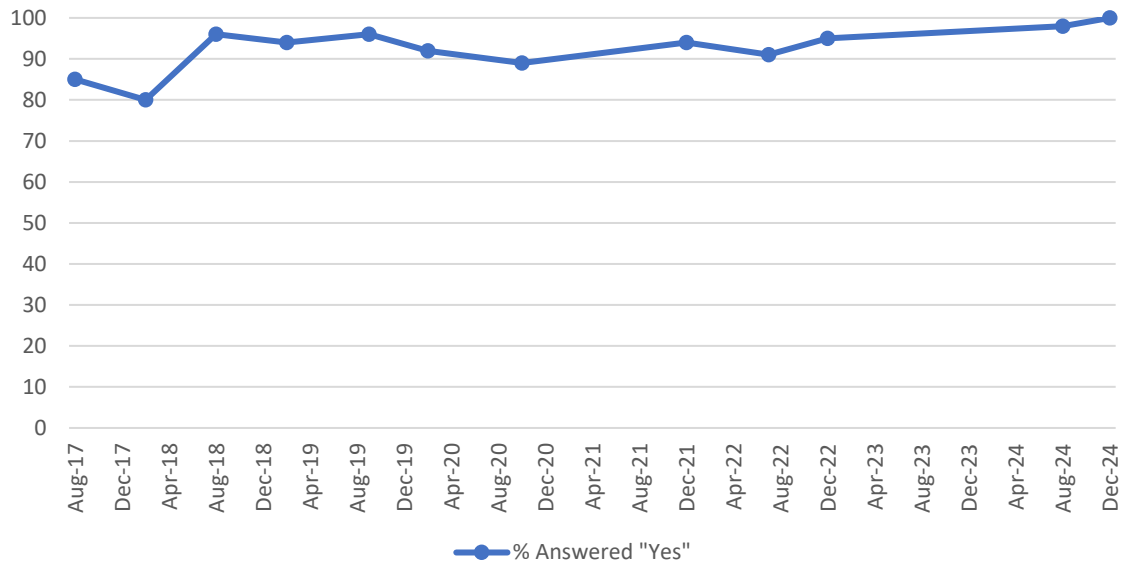


### 10. This is an environment of fairness and transparency.

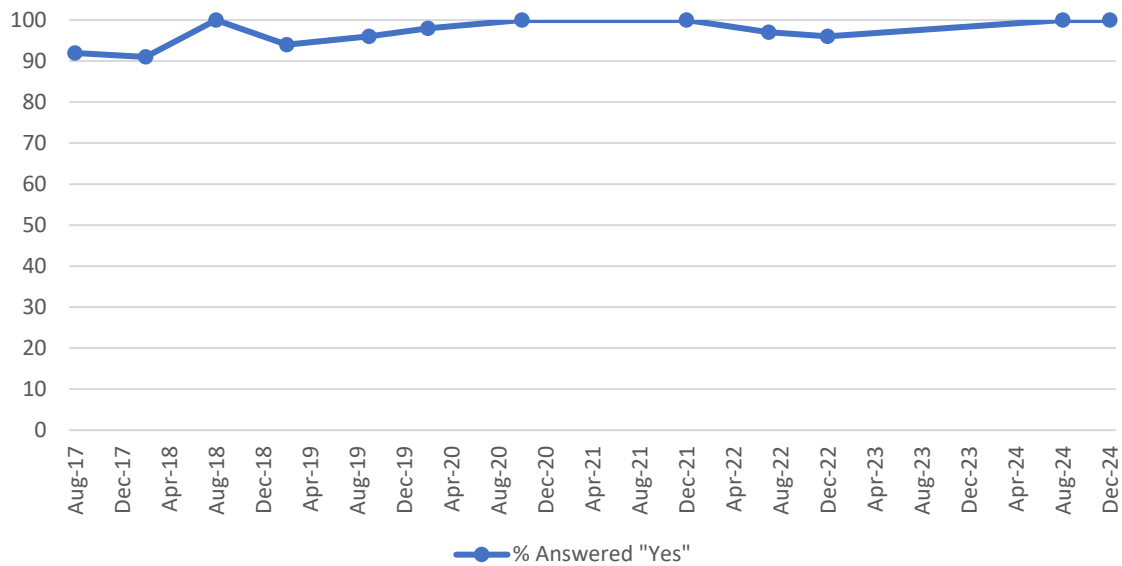


  
**+23%**

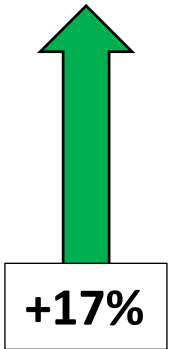
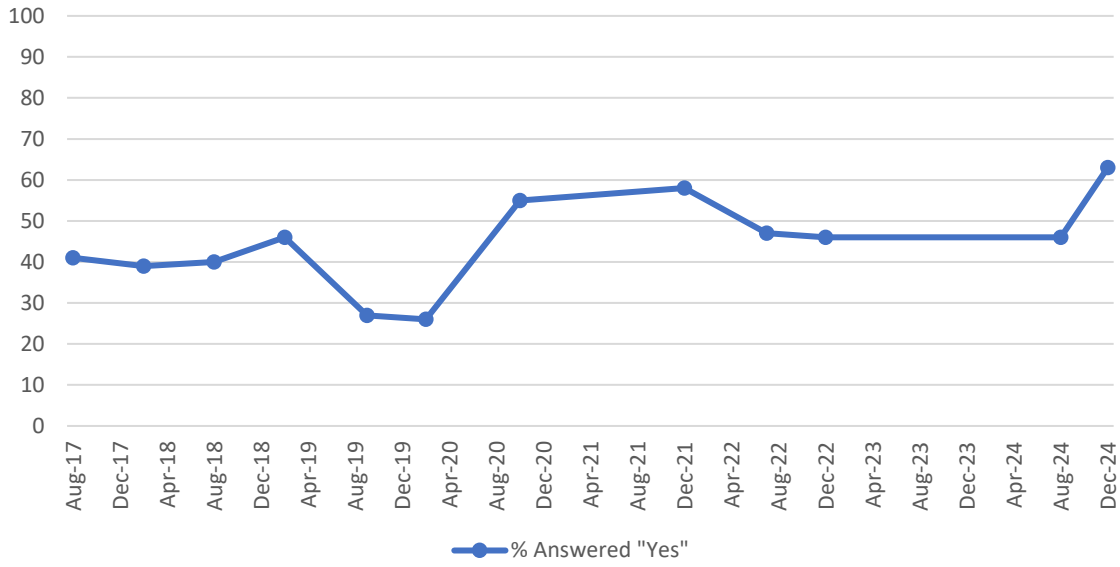
### 11. I feel like what I do makes a difference for our clients.



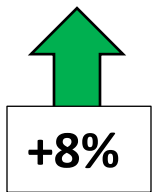
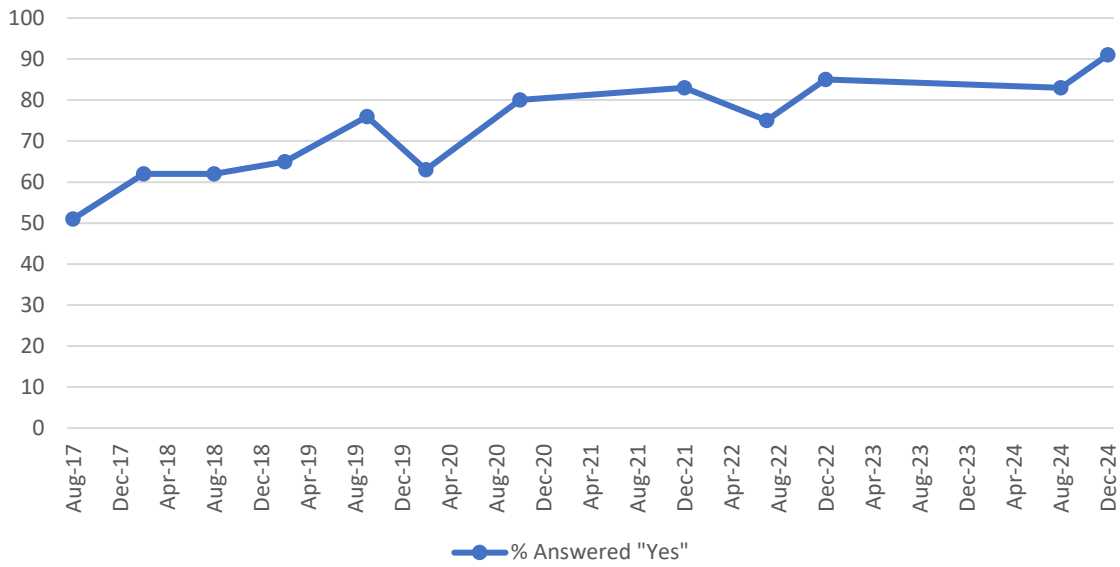
### 12. What I do contributes to the success of CSS.



### 13. My strengths are being fully utilized.

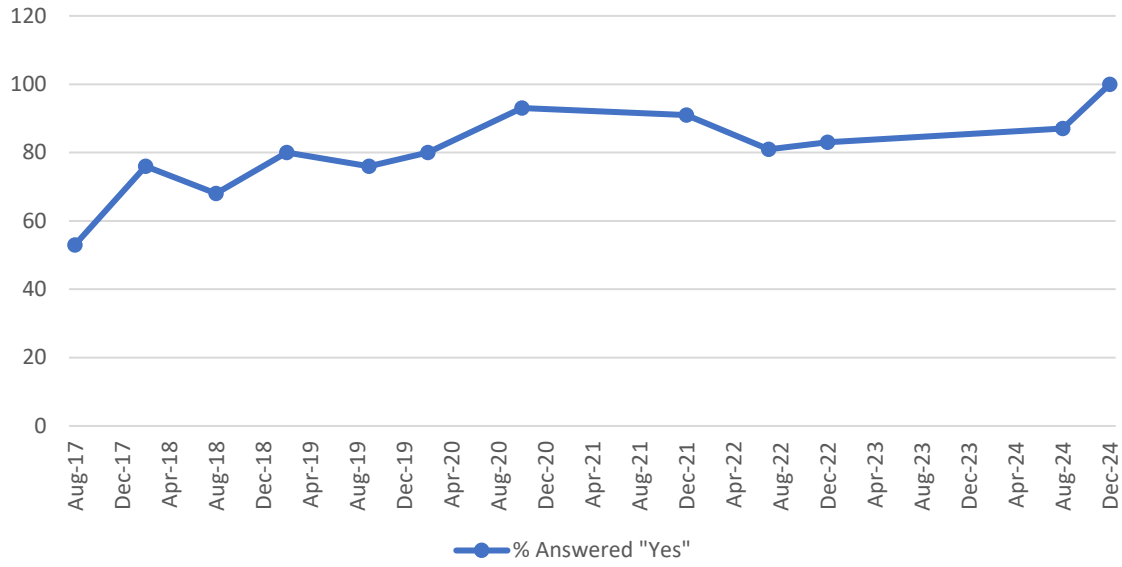


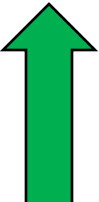
### 14. I have the freedom I need to be effective.



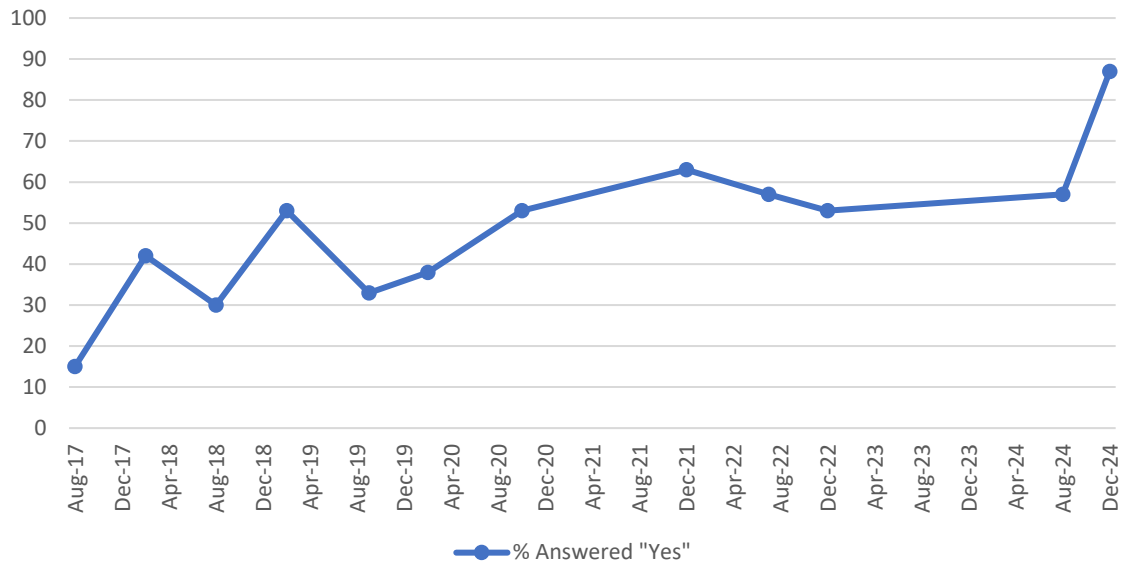


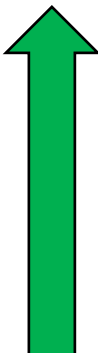
### 15. I have the freedom to express myself.



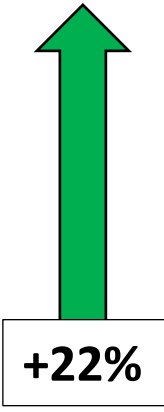
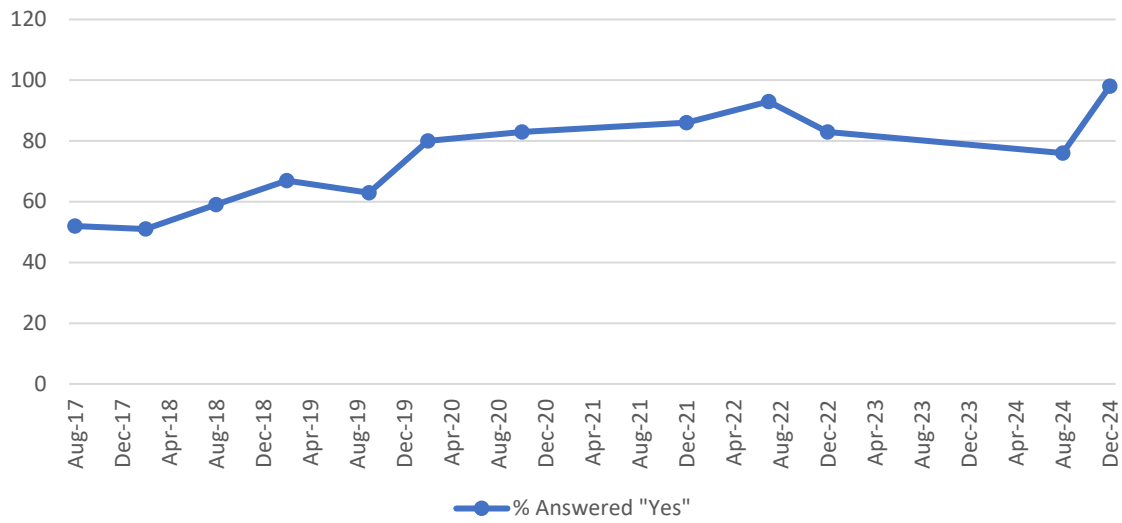
  
**+13%**

### 16. Do you see results of your voiced concerns?

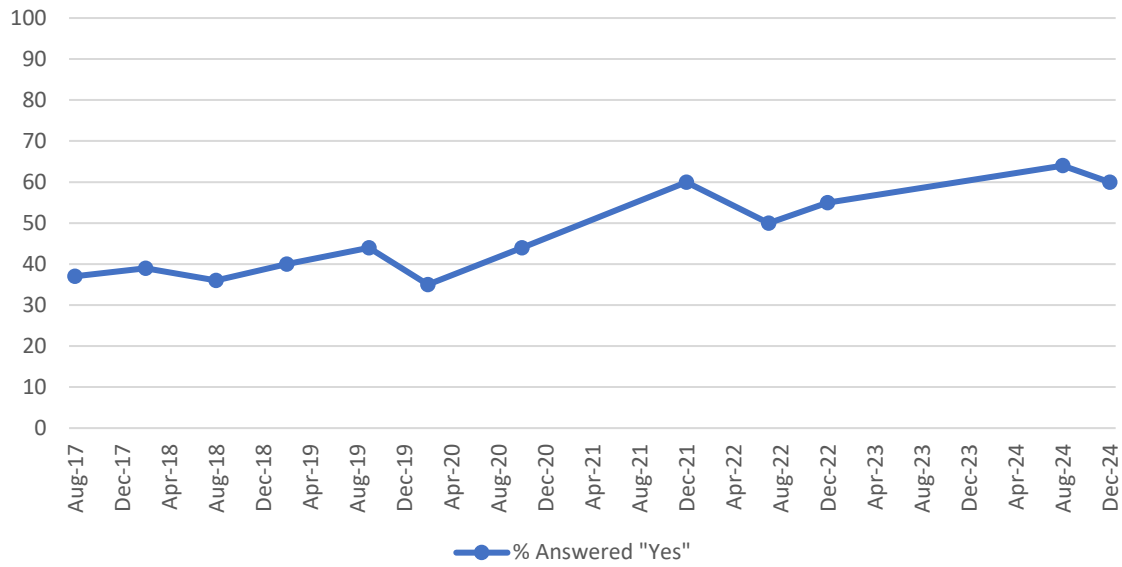


  
**+30%**

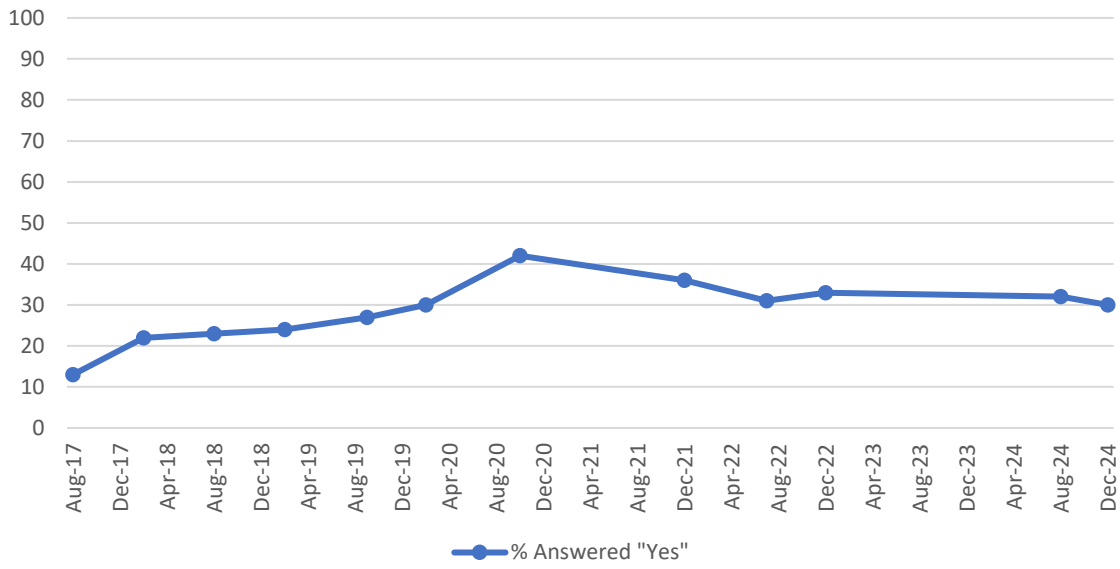
### 17. There are professional skills development options available to me.



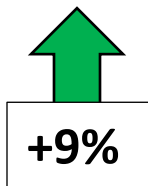
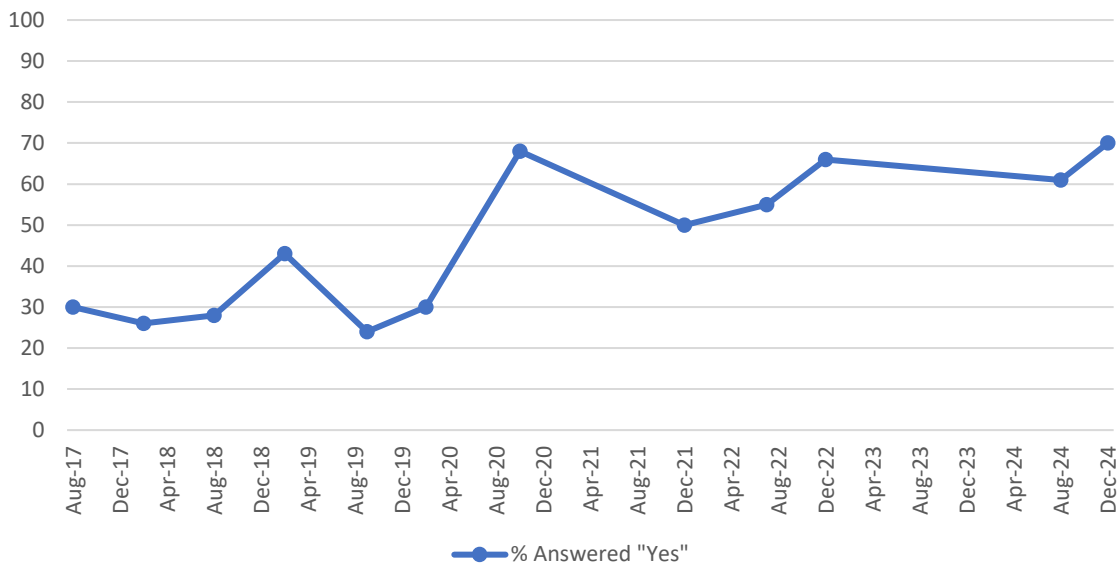
### 18. There are opportunities for advancement.



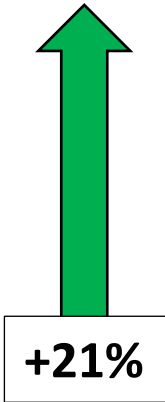
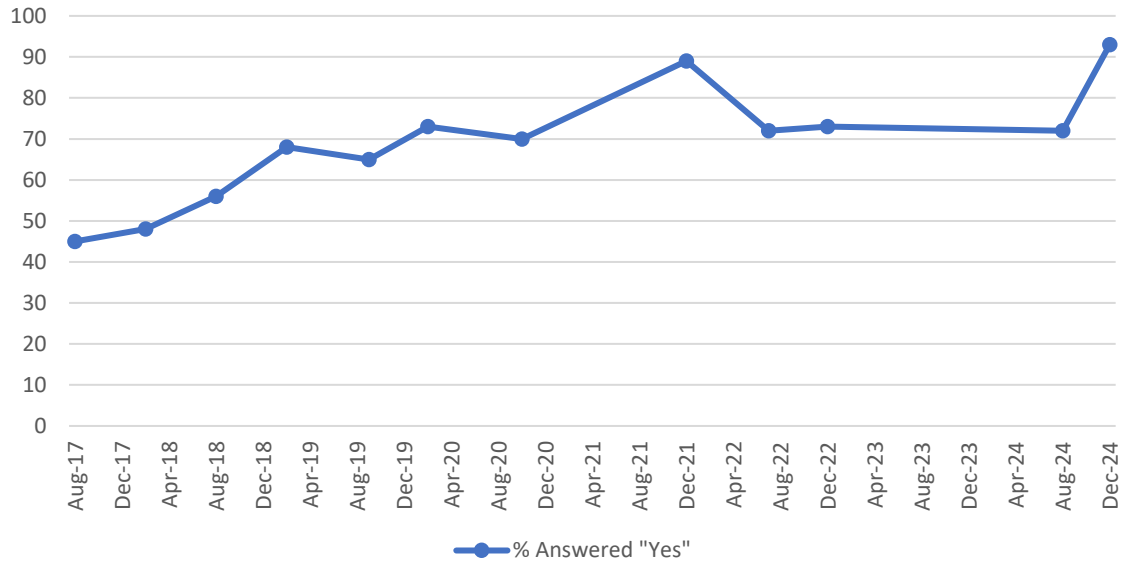
### 19. As an organization, do we do things efficiently?



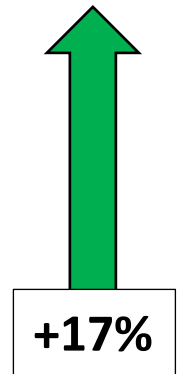
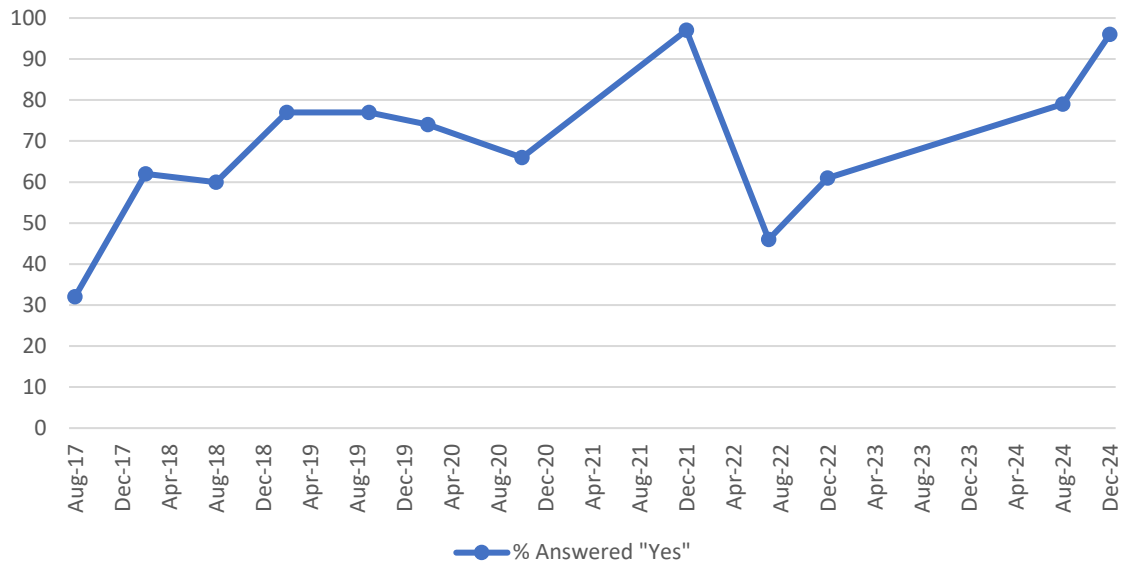
### 20. Are we assisting our clients in the best way possible?



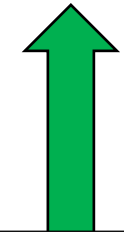
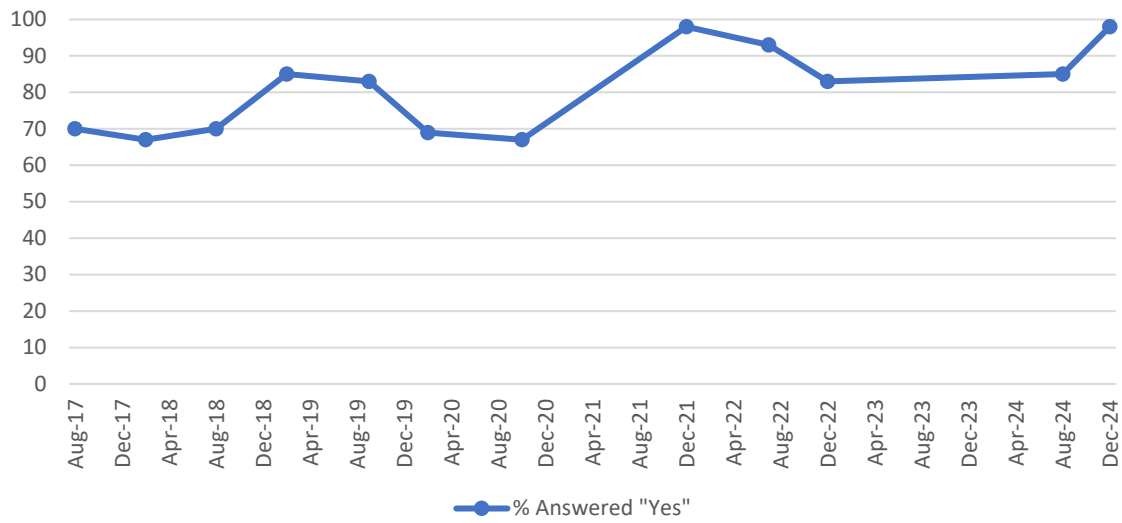
### 21. I believe management has my best interests at heart.



### 22. Has our overall situation improved since last year?

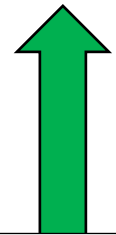
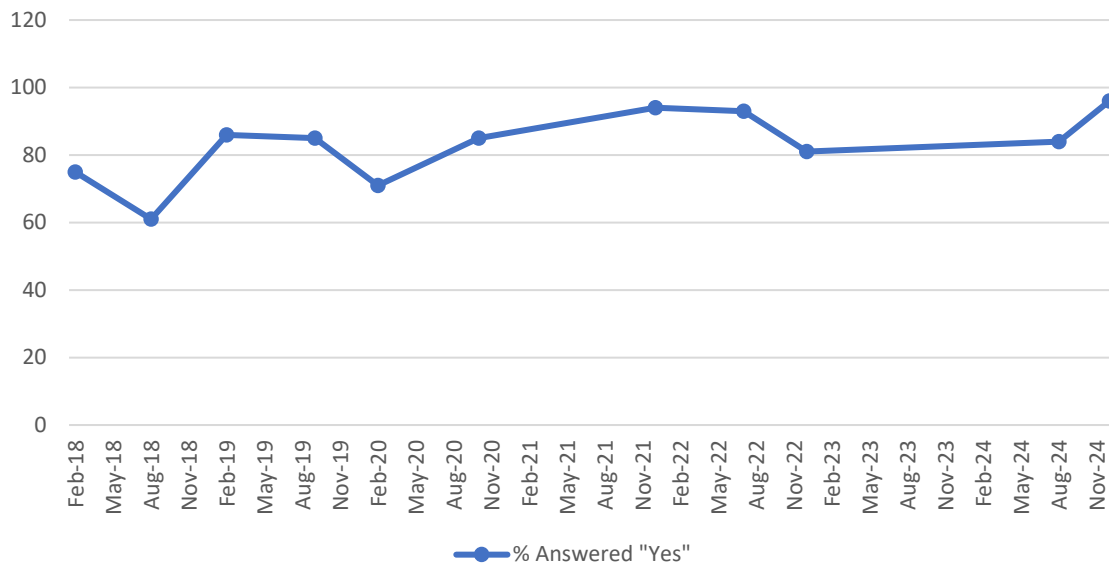


### 23. Can you see that sincere efforts are being made to improve?



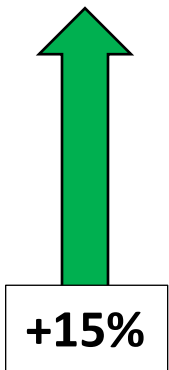
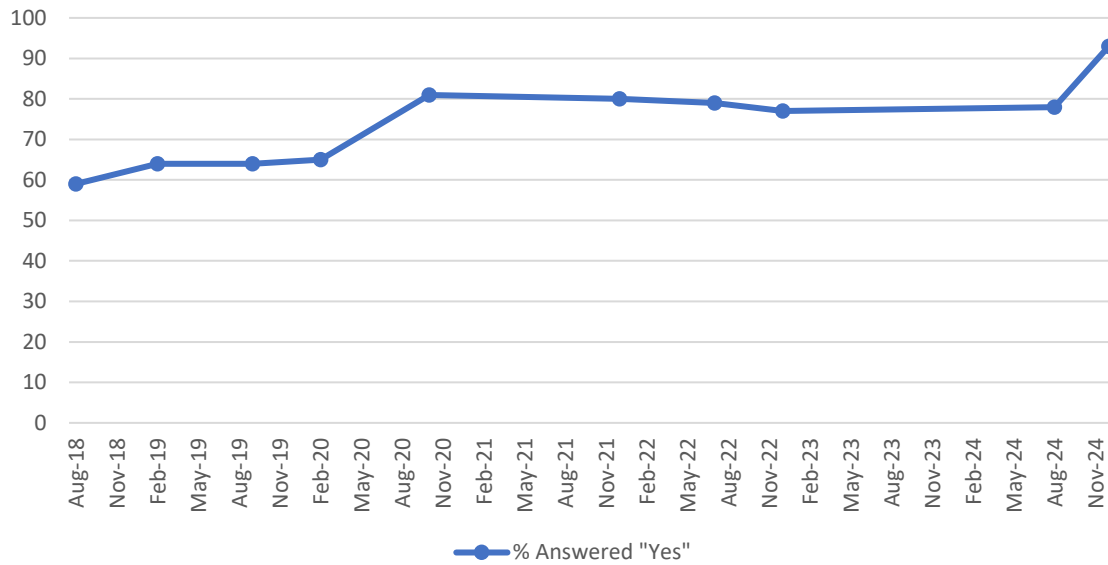
**+13%**

### 24. I have been thanked for my work in the last week.

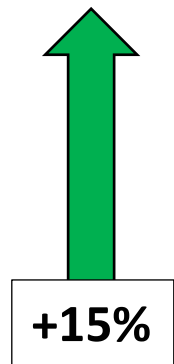
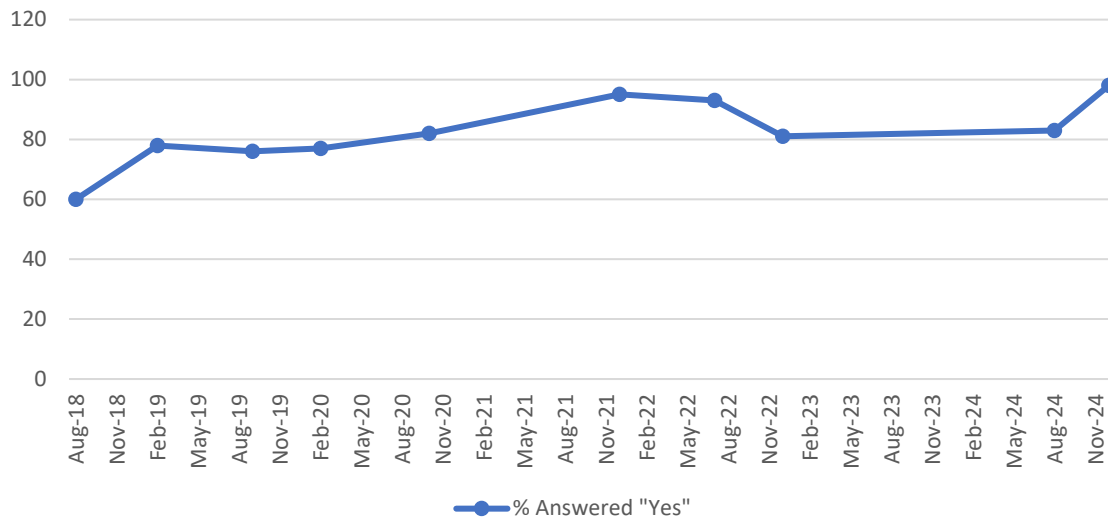


**+12%**

### 26. Are you empowered to make a decision?



### 27. After you make a decision, do you feel that you will be supported by the organization?



## 28. Are you clear on the direction that the organization is going?

