



Board of Directors Meeting Agenda

Thursday, January 29, 2026 - 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 Microsoft Teams Meeting](#)

Phone 1-786-600-3104

Conference ID: 182 390 520#

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

Chief Local Elected officials for 2026

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

Board Member Updates

- Welcome New Board Member
 - Patricia Rand, PhD.- State College of Florida
- Resignation
 - Sharon Hillstrom- Resignation Effective 12/31/2025

Audit and Tax Services Proposal Review Committee Appointments

- Lorri Kidder
- Jim Bos
- Eric Troyer

Officer Nominating Committee Appointments

- Ashley Brown
- Allison Imre
- Eric Troyer

Bylaws Review Committee Appointments

- Lisa Eding
- Sarah Tar

Action Items - David Kraft

- Consent Agenda – David Kraft
 - Approval of November 13, 2025, Board of Directors Meeting Minutes
 - Approval of Revised CareerSource Suncoast Policies



Action Items - continued

- Acceptance of Financial Audit Report for Program Year Ending June 30, 2025 – James Halleran, James Moore & Co.
- Approval of Strategic Plan 2026- 2028 – Joshua Matlock

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

- Robin Dawson, CFAO
- Anthony Gagliano, COO

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

Next Board of Directors Meeting – David Kraft

March 12, 2026 -*This meeting is combined with the Executive Committee Meeting*
Location: 3660 N. Washington Blvd, Sarasota, FL

Meeting Adjournment- David Kraft



Action Item

Consent Agenda

- Approval of November 13, 2025, Board of Directors Meeting Minutes
- Approval of Revised CareerSource Suncoast Policies

CAREERSOURCE SUNCOAST
Board Meeting Minutes
Virtual TEAMS Meeting and In-person
3660 N. Washington Blvd., Sarasota, FL 34234
Thursday, November 13, 2025
8:00 A.M.

Call to Order

David Kraft, Chair, called the meeting to order at 8:02 a.m.

CEO Report:

Federal Level Update: The recent federal shutdown ended, allowing re-engagement with lawmakers and Department of Labor (DOL) staff. A previously canceled meeting with Henry Mack (DOL) will be rescheduled. Purpose: discuss modifications to reauthorization language to better serve local communities. SNAP funds for career-building activities for able-bodied adults without dependents have run out. CSS is currently using unrestricted funds to cover the staffing charges to continue to serve clients.

State Level Update: Met with multiple senators, representatives, and staff (e.g., Sen. Mayfield, Rep. Tripoli, Rep. Mello, Rep. Esposito) to discuss oversight, education, and human services committees.

Local Level Update: Josh was the Manatee Chamber of Commerce Headliners Event feature in November. Moderating a panel on apprenticeships featuring local employers (Manatee Humane Society, NCN Electric, PGT) and an apprentice. The strategic planning consultants are finalizing strategic framework to present at the next board meeting.

Action Items – David Kraft, Chair

Roll call was performed, and a quorum was established.

- **Approval of September 25, 2025, Board Meeting Minutes - David Kraft**
David Kraft requested a motion to approve the September 25, 2025, Board Meeting Minutes.

Motion: Jim Bos Second: Lisa Eding
Motion passed unanimously

- **Approval of October 21, 2025, Strategic Planning Session Minutes – David Kraft**
David Kraft requested a motion to approve the October 21, 2025, Strategic Planning Session Minutes

Motion: Lisa Eding Second: Eric Troyer
Motion passed unanimously

- **Approval of Budget Modification #1 PY 2025/2026 – Jim Bos**

Jim Bos introduced the budget modification reviewed by the Finance and Performance Committee on November 10, 2025. 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 2025/2026.

Motion: Eric Troyer

Second: Jim Bos

Motion passed unanimously

- **Approval of Related Party Expenditures with the Community Coalition on Homelessness, 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 on Homelessness, dba Turning Points non-profit organization.

David Kraft abstained from discussion and voting.

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

Lisa Eding requested a motion to approve the related party expenditures with the Community Coalition on Homelessness, dba Turning with a \$30,000 maximum for PY2025-2026 for work-based training (OJT) agreements.

Motion: Eric Troyer

Second: Jim Bos

Abstain: David Kraft

Motion passed with majority.

Other Board Business:

- **Finance and Performance Committee Report**

Jim Bos provided an overview of the Finance & Performance Committee meeting from November 10, 2025.

Performance Report: Anthony Gagliano reviewed the CSS WIOA Performance Indicators for PY 2024-2025 ending 06/30/2025. A copy of the performance results was provided in the agenda packet.

CSS PY2024-2025 final letter grade was an “A” with a score of 94.43%. A copy of the current letter grade was provided in the agenda packet. CareerSource Florida Letter Grades are updated on a quarterly basis, being available approximately 45 days from the end of the quarter.

Finance Report: Robin Dawson, VP/CFAO, reviewed the Budget to Expenditure reports. The reports covers the period July 1, 2025 – September 30, 2025, for PY 25-26. The overall burn rate as of September 30, 2025, was 23%. Budget to Expenditure Report by Fundsource was also shared with the committee. Copies of the reports were provided in the agenda packet.

State and federal expenditure requirements reported as of September 30, 2025:

- Admin expenditure rate – 9.43%; max allowed 10%.
- Individual training accounts (ITAs) – 34.78%; min requirement 40%
- Youth paid internships PY24 – 34.16%; PY25 – 0%; min. requirement 20%.
- Youth out of school expenditures PY24 97.74% - PY25 100.00% min. requirement 50%.

Review of Non-Federal Funds Revenue & Expenditures as of September 30, 2025:
Balance of Non-Federal Funds \$ 1,011,744

Florida Commerce PY23-24 Financial Monitoring Report:
Financial monitoring review period dates: 07/01/23 – 06/30/2024. Financial monitoring review dates: 03/03/25 – 03/07/25. Report was received 09/29/2025. Robin Dawson reviewed the FloridaCommerce Financial Monitoring report. There were no findings and three observations noted in the monitoring report. A copy of the report was provided in the agenda packet.

Staff Reports:

Kathy Bouchard, CTO

Staff Retreat: The next staff retreat is scheduled for December 19, 2025.

Recognition of Veterans: In honor of Veterans Day, Kathy acknowledged having seven veterans on staff.

Staffing Update: There is one vacant position for a Disabled Veterans Outreach Program Specialist. The team has identified a strong candidate and is awaiting state approval to fill the role. The approval process is managed by FloridaCommerce, and recent government shutdowns have delayed progress.

Jessica Grise, accounting manager, is leaving. Lori Sardinias is transitioning into the accounting manager role. Whitney Voutour was promoted to the accounting specialist role.

Anthony Gagliano, COO

Hope Florida Program: HOPE Navigator, Jill Hyatt, has helped 116 clients in the past year, providing over 1,200 services. Client, Jerry, who moved to Florida with no home, insurance, or job. With support from Jill, Jerry was able to create an email account, apply for jobs, access disability benefits, and eventually secure employment and insurance. The program focuses on supporting clients in crisis and helping them move forward.

Veterans Services: The team has had a significant impact on veterans, touching 538 veterans in 2024 and helping ninety-five since July 1st of the current fiscal year. They hosted a "Paychecks for Patriots" job fair with over one hundred attendees and forty employers. Staff members Gilbert and Will were recognized for their work with veterans, including connecting them to jobs, technology, and support services. Gilbert received an Eagle award at the State Veterans Summit for the second year in a row, and Will was nominated for the Barbara K Griffin Excellence Award.

Apprenticeships and Financial Workshops: The organization partnered with Fifth Third Bank to deliver financial workshops and provide support dollars. These funds help Veterans who need support services, such Joshua A., a Veteran apprentice, with New Dawn Electric, to acquire tools to advance their career.

[e-Rising 2025 Entrepreneur Event](#): The annual E Rising event for entrepreneurs is scheduled for November 20th at 8 am at the Sarasota Career Center. This year's event features community entrepreneurs sharing their stories. The event aims to grow the local entrepreneurial community and will be held both in-person and online.

Information Technology: The IT team, led by Chet Fialanowski, has implemented a new artificial intelligence policy and is exploring ways to automate client follow-ups and improve scholarship application processes on the organization's website.

Public Comments: None

Next Meeting: January 29, 2026

Location: 3660 N. Washington Blvd, Sarasota, FL

Full Board Meeting Adjournment: The meeting was adjourned at 8:49 a.m. The Executive Committee will reconvene after a break.

Respectfully submitted,

Joshua Matlock
Joshua Matlock (Nov 24, 2025 07:25:51 EST)

Josh Matlock
President, CEO

CAREERSOURCE SUNCOAST - BOARD MEETING ATTENDANCE

Absent Present	Board Member
P	Jim Bos, MJB Group
P*	Ashley Brown, Women’s Resource Center
P	Nick Choat, Sport Clips Haircuts
P*	Will Cromie, Synovus Bank
A	Jackie Dezelski, Manatee Chamber of Commerce
A	Kathy Dwyer, Galen College of Nursing
P	Lisa Eding, Teak Decking Systems
P	Michael Endee, Sarasota County School – Suncoast Technical College
A	Geoffry Gilot, Boys & Girls Clubs
P	Dr. Paul Gansemer, Manatee Technical College
A	Sherod Haliburton, Credit Union1
A	Sharon Hillstrom, Bradenton Area Economic Development Corporation
P*	Allison Imre, Grapevine Communications
A	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
P*	Shaun Polasky, Helios Technologies
P*	Ericka Randall, Vocational Rehabilitation
P*	Jane Roseboro, Centerstone Florida
A	Sarah Tar, PNC Bank
P	Eric Troyer, Kerkering Barberio & Company
A	Mark Viggiano, Local 123 Plumbers, and Pipefitters Union
P*	Craig Warzecha, Bradenton Marauders/Pittsburgh Pirates
A	Ken Waters, Sarasota Housing Authority
	Staff Present: Josh Matlock, Robin Dawson, Anthony Gagliano, Kathy Bouchard, Christina Witt, Michelle Snyder, Gilbert Humphrey, Jill Hyatt, Lori Sardinias*, Shanard Letang, Curt Preisser*
A	Commissioner Tal Siddique - Manatee County
A	Commissioner Teresa Mast – Sarasota County

25 Board Members – 15 present, 10 absent

**Virtual*

CAREERSOURCE SUNCOAST
Policy Approval
Board of Directors Summary Report
January 29, 2026

Background Information:

CareerSource Florida Administrative Policies are business rules, requirements, processes and responsibilities that expand, explain, or further specify federal or state legislation or policies developed by FloridaCommerce. As CareerSource Florida (CSF) approves new Administrative and/or Strategic Policies, CareerSource Suncoast will review these policies to create or revise existing CSS policy and procedures for proper alignment. FloridaCommerce requires local boards to present all local policies to the Board of Directors for review and approval. Outlined below are four (4) CSS Board Policies for your review and approval.

Summary of Policy Revision:

Purchasing and Procurement Policy#02-21

This policy was updated to reflect the following changes:

- Replace Department of Economic Opportunity with FloridaCommerce
- Added Section "The Use of State Procured or Developed Tools". This section was added due to the release of CareerSource Florida Workforce Policy #O124- Statewide Standardization of Tools and Services.

Distribution of Gas Card and Bus Passes Policy #03-21

This policy was updated to reflect the following changes:

- CSS no longer utilizes pre-paid gas cards as a form of support or incentive payments. All references to gas cards has been removed from the policy.
- Policy title change from "*Distribution of Gas Card and Bus Passes*" to *Distribution of Bus Passes*"

Client Grievance and Reporting Policy #09-21

This policy was updated to reflect the following changes:

- Replace Department of Economic Opportunity with FloridaCommerce.
- Minor edits to include staff title changes, formatting, updating hyperlinks, etc.
- Added process regarding Migrant Season Farmworkers.
 - "CareerSource Suncoast will work to resolve the complaint related to Migrant Seasonal Farm Workers (MSFW) within five (5) days through an informal process. Any complaint not related to MSFW, must be elevated to the appropriate authorities"

Whistleblower Policy and Procedure Policy #01-25

This policy was updated to reflect the following changes:

- Policy number and format change to the current policy design template.
- Added a Background section to the policy.
- Removed organizational titles CTAO, COO, CFAO, CEO to a generalized term of CSS Chief Executive Officers.

CAREERSOURCE SUNCOAST
Policy Approval
Board of Directors Summary Report
January 29, 2026

Requested Action:

A motion that the Board of Directors approve the following revised policies:

- Purchasing and Procurement Policy #02-21
- Distribution of Gas Card and Bus Passes Policy #03-21
- Client Grievance and Reporting Policy #09-21
- Whistleblower Policy and Procedure Policy #01-25

Respectfully submitted,
Christina Witt
Senior Director of Economic Development



Policy #02-21

Policy: Purchasing and Procurement	Page 1 of 9
Program: Workforce Innovation and Opportunity Act (WIOA), Temporary Assistance to Needy Families (TANF), Supplemental Nutritional Assistance Program (SNAP), and Wagner-Peyser (WP)	
Section: Finance	
Date of Issuance: 10/14/2021	Revision Date: 1/29/2026
Distribution: CareerSource Suncoast Staff Members	

Background

The Office of Management and Budget (OMB) regulation 2 CFR 200, known as the Uniform Guidance, establishes principles and standards for determining allowable activities and costs for federal awards carried out through grants, cost reimbursement contracts, and other agreements.

Purpose

To ensure the purchase of goods and services is conducted in an open manner with competitive pricing, proper management, and oversight controls to ensure Finance accountability and efficiency and to prevent waste, fraud and abuse and avoid acquisition of unnecessary or duplicative items.

POLICY:

General Procurement Standards

CareerSource Suncoast (CSS) will comply with federal and state laws and regulations pertinent to purchasing and procurement and these procurement procedures shall be a reflection of those laws and regulations in accordance with 2 CFR 200.318/45 & CFR 75.327 (general procurement standards). All purchasing is controlled through this policy and procedure and is approved by the President/CEO or the Chief Operating Officer. Prior approval must be obtained before items or services are purchased, unless otherwise stipulated.

These policies and procedures will also apply to all CSS subrecipients purchasing goods and services with funds awarded by CSS, except for governmental units subject to their own procurement guidelines or subrecipients that have submitted their procurement guidelines to CSS for review and have received CSS approval.

Procurements necessary for the day-to-day operation of CSS and the one-stop career centers will be approved by the CSS President/CEO or the Chief Operating Officer (COO) as described herein. The CSS CEO/COO are authorized to approve contracts for goods, services, or training, including (among others) on-the-job training, work experience, customized training, and employed/incumbent worker training, for amounts of \$150,000.00 or less. Contracts for more than \$150,000.00 require approval by a majority of the Board.

Contracts involving a CSS Board member and either a relative (as defined in s. 112.3143(1)(c)) of a local board member or of an employee of the local board, or an employee of the local board or their companies are considered related party contracts. Related party contracts of \$150,000.00 or less **must** be approved by a minimum two-thirds vote of the Board, irrespective of the amount.

Related Party Contracts that are \$10,000 or greater must be submitted to FloridaCommerce for approval; FloridaCommerce must approve and certify the contract prior to its executions and any expenditures occurring in the contract's fiscal year.

All related party contracts under \$10,000 do not require prior approval by FloridaCommerce . However, such contracts must be approved by the Board prior to execution and reported to FloridaCommerce to CareerSource Florida via email at: worfor@commerce.fl.gov.com within 30 days of approval by the local board.

Where appropriate, an analysis shall be made of lease and purchase alternatives to determine which would be the most economical and practical procurement. The analysis should only be made when both lease and purchase alternatives are available.

To foster greater economy and efficiency, CareerSource Suncoast may enter into state and local intergovernmental agreements or inter-entity agreements where appropriate for procurement or use of common or shared goods and services.

CareerSource Suncoast shall comply with the procurement standards in 2 CFR 200.318 - 200.326 when procuring property and services and maintain sufficient oversight to ensure that contractors (vendors) perform in accordance with the terms, conditions, and specification of their contracts or purchase orders. Contracts shall only be awarded to responsible contractors (vendors) who possess the ability to perform successfully under the terms of the procurement. Consideration will be given to such matters as integrity, compliance with public policy, past performance, and financial and technical resources.

All procurement transactions shall be conducted in a manner providing full and open competition as described in OMB Uniform Guidance Part 200.319.

All audit services are required to go out for public notice and request for proposal (RFP). Contracted audit services can be no more than five years and then must follow Florida Statutes and be competitively re-procured. The previous audit firm may be awarded the new contract for audit services through the competitive procurement if the lead partner of the audit firm has not been engaged as the lead partner with the Board for any of the previous five years.

Funds expended for events must be compliant with 2 CFR 200.421, and FloridaCommerce' s Guidance on Use of Funds for the Purchase of Outreach/Informational Items (FG-OGM-84). Documentation must be retained to support the cost of the funds expended and must demonstrate that the costs are reasonable and necessary to connect individuals to employment and training services.

Ethical Considerations in Procurement

CSS has adopted a code of conduct related to the conduct of procurements. CSS Board of Directors and staff must comply with state and federal rules and regulations governing the conflict of interest and appearance of conflict of interest in the procurement process.

No CSS member or officer, or employee or authorized agent of CSS shall cast a vote, nor participate in any decision-making capacity, on the provision of services by such member (or any organization which that member directly represents), or on any matter which would provide any direct financial benefit to the appropriate individual or organization, except when that interest has been placed in a disclosed blind trust.

A conflict of interest is present if the individual, any member of the individual's immediate family, the individual's business partner, or an organization that employs, or is about to employ, any of these individuals has financial or other interest in the firm or organization selected for award. CSS staff and Board members making the award will neither solicit nor accept gratuities, favors, or anything of monetary value from awardees, potential awardees, or parties to sub-agreements. Unsolicited gift items of nominal intrinsic value are excluded from this definition. Any potential conflict, whether real or apparent, must be disclosed to the CSS President/CEO, or, in the case of a Board member, to the Board. Such disclosure must be documented and filed with the procurement file.

In accordance with CareerSource Florida Inc.'s guidance (*Modifications to Workforce Florida Inc. Contracting Policy*, May 2012) (CareerSource Florida Contract Guidance), CSS will not enter into a contract with one of its own Board members, with an organization represented by its own Board member or with any entity where a Board member has any relationship with the contracting vendor/subrecipient.

At the Board's discretion, the following may be exempted from the above paragraph:

- A. A contract with an agency (as defined in Florida Statute 112.312[2], including, but not limited to, those statutorily required to be board members) when said agency is represented by a Board member and said member does not personally benefit financially from such contracts;
- B. A contract with a Board member or a vendor (when a Board member has any relationship with the contracting vendor) when the contract relates to the member's appointment to the board under Pub. L. No. 113-128, ("Workforce Innovation and Opportunity Act").
- C. A contract with a member receiving a grant for workforce services under Federal, State, or other governmental workforce programs.
- D. A contract between a Board and a Board member which is not exempted under paragraphs (a), (b) or (c) where the board documents exceptional circumstances and/or need and the Board member does not personally benefit financially from the contract. Based upon criteria developed by CareerSource Florida Inc., FloridaCommerce shall review the Board's documentation and ensure compliance.

Each contract which is exempted from the general prohibition in the paragraph above must meet the requirements set forth in WIOA "conflict of interest" provisions.

In addition, CareerSource Suncoast will use the CareerSource Florida Board approved definition of "employee" as it relates to conflict of interest as follows:

"Employee" means a person employed full-time by a regional workforce board working in a managerial or supervisory capacity or who has direct contract management or direct fiscal involvement with the contract voted on by the board."

Regardless of the type of procurement, if CSS desires to enter into a contract with an organization or individual represented on the Board of Directors, the contract must be approved by a two-thirds vote of the Board members present, a quorum having been established, and the Board member who could benefit financially from the transaction must declare a conflict and abstain from voting on the contract. The Board shall comply with section 445.007(11), Florida Statutes. The Board and its employees must annually disclose to FloridaCommerce's financial monitors any conflicts of interest that may arise during the upcoming year or that did arise in the current year and was not previously disclosed.

- Prior to entering into any Related Party Contract, the proposed Related Party Contract must be brought before the Board for consideration and approval. The Board shall ensure that the Board member with the conflict abstains from any vote regarding the Related Party Contract.
- If the disclosure was not made prior to the meeting because the conflict was unknown prior to the meeting, the Board shall ensure that disclosure is made at the next possible meeting after knowledge of the conflict becomes available.

Board members must disclose any such conflicts in accordance with the requirements stated above and complete appropriate conflict-of-interest forms.

No individual in a decision-making capacity or involved in the writing of specifications or administration of the procurement process, shall engage in any activity, including the participation in the selection, award, or administration of a subgrant or contract supported by its funds, if a conflict of interest, real or apparent, would be involved.

Therefore, Financial and Organizational Disclosure Statements must be completed by all CSS board members and the CSS President/CEO. Within 30 days of their appointment or employment, and again annually, on January 1st, and at any other time that organizational affiliations change, such individuals will be notified that they must complete and file the above-mentioned disclosure form.

Procurement Guidelines & Thresholds

Methods of Procurement:

CareerSource Suncoast shall use one of the following methods of procurement:

- A. Micro-purchases (threshold limit set by the authority of the Federal Acquisition Regulations (FAR) as 48 CFR Subpart 2.1 and the Uniform Guidance) of supplies or services, the aggregate dollar amount not to exceed \$10,000 per program year may be awarded without solicitation of competitive quotations, if the price is determined to be reasonable based on research, experience, purchase history, or other information and is documented accordingly. To the maximum extent practicable, CSS shall distribute micro-purchases equitable among qualified suppliers.
- B. Small Purchases from \$10,000.01 to \$25,000.00 require minimum of two written quotes. If the lowest priced item is not purchased, a written justification will be noted on the electronic purchase requisition. Exceptions to this threshold are when purchases are made during an emergency or are sole sourced. Sole source documentation is required in accordance with 2 CFR 200.
- C. Small Purchases from \$25,000.01 to \$150,000 shall require a minimum of three written quotes. If the lowest priced item is not purchased, a written justification will be noted on the electronic purchase requisition. Exceptions to this threshold are when purchases are made during an emergency or are sole sourced. Sole source documentation is required in accordance with 2 CFR 200.
- D. Purchases of \$150,000.01 or More shall be publicly noticed on CSS website. Formal request for proposals (RFP), bids, or quotes shall be issued. The Board will make the final procurement decisions for RFPs.
- E. An annual price analysis to document reasonableness may be conducted for goods and services ordered on an ongoing basis. In lieu of a price comparison for each purchase, an annual price analysis shall be conducted for those goods and services purchased with regularity to operate the organization. An annual estimate shall be made of the value of the items to be ordered, and the proper procurement in accordance with this section shall be completed based upon the aggregate amount estimated to be necessary.

- F. Purchases made based upon prices established by a state contract administered by the State of Florida, Department of Management Services or CareerSource Florida, will not require further procurement actions. When making a purchase based upon a price established by a state contract or CareerSource FL, the contract number, year, and title will be referenced on the electronic purchase requisition.

Non-competitive procurement or sole source:

Will be considered in the following situations:

- A. On-the-Job Training (OJT), customized training, and training provided to customers from the approved training vendor list
- B. It may also be used in situations where it is infeasible to follow small purchase or competitive procurement procedures, **and**:
- i. the goods or services' aggregate cost does not exceed the micro-purchase threshold;
 - ii. The goods or services are available only from a single source;
 - iii. There is a public exigency or emergency that does not permit delay;
 - iv. After solicitation of a number of sources, competition is determined to be inadequate;
 - v. The awarding agency authorizes noncompetitive proposals.
- C. State policy allows the use of noncompetitive procurement and has determined that it is infeasible to competitively procure utilities, thus allowing noncompetitive procurement of such.
- i. A failure to properly plan for procurement is not an emergency under these rules.
 - ii. In the event of an exigency or emergency, a competitive procurement must be initiated within two years after the purchase or procurement. In other instances where sole-source procurement was used for a purchase, an attempt to solicit the goods or services through competitive procurement must be initiated within three years after the procurement.
 - iii. Staff shall complete a justification for noncompetitive procurement and an appropriate cost analysis to assure reasonableness, utilizing the appropriate format.

Simplified Acquisition Threshold

Only those purchases exceeding the Simplified Acquisition Threshold of \$250,000 require some form of cost price analysis which shall be documented. Documentation shall be retained in the accounts payable files along with any invoices received and payments made.

The method and degree of analysis is dependent on the facts surrounding the particular procurement situation and independent estimates should be made before receiving bids or proposals.

Items Requiring State Approval Prior to Purchase

The Finance Department will submit annually a request to the State of Florida to purchase items requiring prior grantor approval in accordance with 2 CFR 200 on the appropriate form pursuant to CareerSource Florida's Administrative Policy Number 87 (*Prior Approval Administrative Policy for Regional Workforce Boards*). For the remaining items that require prior approval, and which are not on the annual form, CSS will complete and submit to FloridaCommerce the "Prior Approval Request Form" prior to incurring expenditures. The request for approval must be followed by an appropriate procurement.

- A. The Board will obtain prior written approval from FloridaCommerce prior to purchasing any information technology resource or conducting any activity that will, in any way, access FloridaCommerce data and FloridaCommerce -owned systems.

The Use of State Procured or Developed Tools

Tools and services negotiated and acquired at the state level must be used by all LWDBs that have an identified need for the specific purpose the tools and services are acquired to fulfill. LWDBs are prohibited from using funds sub-granted by FloridaCommerce for the purchase of tools and services that are duplicative of state-procured resources without an approved waiver request.

When a state procured tool or service is not available, CSS must attempt to first utilize common tools or services procured by a regional planning area. Regional planning areas can assist by negotiating improved rates for the LWDBs in their planning area. Prior to procuring separate solutions, CSS must be able to show evidence of work with the local regional planning area to provide a common tool or service at a reduced rate. CSS must review the list of State procured workforce specific tools or services posted by CareerSource Florida, in collaboration with the Florida Department of Commerce (FloridaCommerce).

CSS will follow the process outlined in the CareerSource Florida Workforce Policy #O124- Statewide Standardization of Tools and Services when seeking to opt out of statewide implementation or utilize a tool or service in place of the procured or acquired tool. CSS may request a waiver from FloridaCommerce and CareerSource Florida for two years or until the contract expires, whichever occurs first.

Additional Purchasing Requirements

- B. At this time, purchase of food and/or beverages with federal or state funds are not allowed under Florida Statute 445.007 except as expressly authorized by state law. Consult with your immediate supervisor when such issues arise.
- C. In determining approval for dues or memberships, the requestor must first determine if any portion of those dues or membership dollars goes toward lobbying effort and provide documentation from entity. Federal and state funds cannot be used for lobbying, and any percentage of dues or memberships must either be short paid, or paid with non-federal, non-state funds.
- D. CareerSource Suncoast shall take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible and will adhere to OMB Uniform Guidance Part 200.321.
- E. CSS, when appropriate, will seek goods and services through the Prison Rehabilitative Industries and Diversified Enterprises, Inc. (PRIDE), and from RESPECT of Florida (products and services produced by individuals with disabilities).
- F. CSS shall provide a preference to the extent permitted by law, to maximize use of goods, products, and materials produced in the United States when procuring goods and services under Federal awards.
- G. Awards will not be made to a debarred or suspended party. This is required to be verified for all sub-recipient contracts and for vendor contracts greater than or equal to \$25,000, or procurements of Federally- required audit services in any amount.
- H. If CSS enters into a contract in the amount of \$1,000,000 or more, in accordance with the requirements of section 287.135, Florida Statutes, CSS will obtain a certification that the contractor is not listed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, engaged in business operations in Cuba or Syria, or meets the conditions for exemption as provided in section 287.135(4), Florida Statutes. These lists are created pursuant to sections 215.4725 and 215.473, Florida Statutes.

- I. CSS will not accept responses to procurement solicitations from, or award a contract to, any entity that appears on the discriminatory vendor list described in section 287.134, Florida Statutes.
- J. All procurement contracts and other transactions between CSS and units of state or local governments using WIOA funds must be conducted only on a cost reimbursement basis. No provision for profit is allowed. Any excess of revenue over costs incurred for services provided is included in program income.
- K. CSS will negotiate profit as a separate element of the price for each contract in which there is no price competition and, in all cases, where cost analysis is performed.
- L. Costs or prices based on estimated costs for contracts are negotiated using the Federal cost principals.
- M. The cost plus a percentage of cost or percentage of construction cost methods of contracting will not be used.
- N. Time and materials type contracts may be used only after the determination that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk.
- O. Funds provided to the Subrecipient by FloridaCommerce may not be used to pay consultants, as that term is defined in 5 CFR 304.102, in excess of \$710 per day and must be documented as reasonable and necessary.

Subrecipient or Vendor/Contractor Determination

Organization staff will evaluate the substance of each relationship to determine whether features represent a subrecipient or vendor/contractor relationship. A Subrecipient and Vendor/Contractor Determination Checklist will be completed by Organization staff in distinguishing between subrecipient and vendor/contractor relationships. Characteristics that are indicative of a subrecipient or contractor relationship are outlined in 2 CFR 200.331.

Process:

Purchase Requisitions (PR) / Purchase Orders (PO):

Microix will be used for requesting and placing orders for: office supplies; office furniture; equipment; intangible purchases, such as consultant's fees, subscriptions, memberships, meeting registrations, repairs, meeting expenses (i.e., room charges), booth fees, etc.

Requesting staff will prepare an electronic Purchase Requisition following all rules outlined above in Section III Procurement Guidelines & Thresholds. All required back up must be attached to the electronic PR, which must be approved through the appropriate Microix system workflow assigned to the requesting staff. The final approval of the workflow will be made by either the President/CEO or Chief Operating Officer. Once that approval is made, Microix recognizes the purchase requisition as a purchase order. A notification of the final approval will be automatically emailed from the Microix system to the Requestor to purchase the items.

When the President/CEO and Chief Operating Officer are both absent, the Chief Financial and Administrative Officer may approve electronic emergency Purchase Requisitions to avoid interruption in services. Should all executive approvers be absent, and an emergency situation arises, a verbal approval will suffice and must be notated in the electronic Purchase Requisition.

The Requestor will forward a copy of the invoice and delivery ticket (signed and dated) referencing the PO number to Finance for payment.

Office Supplies and Printer Toner

Designated Requestor staff assigned with the task of maintaining supply inventory will secure the approval of office supply purchases from their respective supervisors and will then place an online order on hold with the appropriate office supplies store. The Requestor shall then complete an electronic Purchase Requisition, attaching a copy of the order cart. Once electronically assigned a PR/PO number in Microix, the Requestor must reference the PR/PO number in the online office supplies order. When receipt of final approval is received via email, the Requestor must notify Finance of the final approval, who shall then review and release the office supplies order. Once the supplies and invoice are received, the delivery ticket (signed and dated) will be forwarded to Finance for payment. An employee other than the employee who requested the goods or service must receive the goods and services to verify the proper count, as well as sign and date the packing slip.

Equipment and Other Capital Expenditures

All expenditures in this category that are \$5,000 or more per item, require individual prior approval by the State, per CareerSource Florida Administrative Policy #87 "Prior Approval Administrative Policy for Local Workforce Development Boards", dated 1-17-17. Any plans for such expenditures should be reviewed in advance with the Chief Financial and Administrative Officer, who will coordinate prior approval process with FloridaCommerce .

Emergency Facility and Equipment Maintenance

Emergency circumstances for maintenance and repair of facilities and/or equipment may be handled through the Chief Financial and Administrative Officer or Chief Operating Officer without the need for prior approval from the President/CEO.

Service Provider Procurement

With the passage of Florida Senate Bill 428, 2008, Sections 445.004 and 445.007, Florida Statutes; Workforce Innovation & Opportunity Act (WIOA) of 2014 and approval by the Governor, CareerSource Suncoast (CSS) now provides direct services for many programs. CSS reserves the right to procure service providers when appropriate.

CSS staff periodically issue a Request for Proposals (RFP) for the provision of services to its customers, such as outreach and recruitment, intake and eligibility determination, assessment, case management, core services, intensive services, training services, job placement, and other services.

The procurement will be advertised, and prospective service providers must submit a proposal by the RFP due date which addresses all aspects of the request, such as the services to be provided, target groups to be served, cost, staffing, fiscal and programmatic experience, accountability in operating federal grants and programs, and demonstrated ability to meet the required performance. Proper consideration shall be given to community-based and faith-based organizations (CBO/FBO) and minority-owned businesses, including women's organizations.

When developing the scope of work for the RFP, CSS will take into consideration the updates to 2 CFR 200 that focus on improving the selection process and shifting the focus to the balance between performance and compliance. Specifically, 2 CFR 200 states that the program outlined in a scope of work must be designed with clear goals and objectives that facilitate the delivery of meaningful results. Program performance should be measured based on the goals and objectives developed during program planning. The program must align with the strategic goals and objectives within the Federal awarding agency's performance plan and should support that awarding agency's performance measurement, management, and reporting.

Additionally, when reviewing RFPs CSS will select the recipients most likely to be successful in delivering results based on program objectives by performing a risk evaluation. A risk evaluation may consider factors such as:

- Financial stability
- Quality of management systems
- History of performance
- Audit reports and findings, and
- Ability to effectively implement requirements

All proposals submitted will be reviewed by staff for responsiveness to the RFP requirements. In addition, staff will analyze costs for each responsive proposal. Responsive proposals and cost analysis will be provided to the RFP Review Committee made up of Board members, staff, and community members. Each reviewer will evaluate the proposals according to predetermined criteria and award each proposal a numerical score. Proposals will then be ranked by each reviewer, and those individual rankings will be combined into a Committee Report, which will be presented to the CSS Executive Committee for review and selection/approval of service provider(s) for recommendation to the full Board for final approval.

The Executive Committee may examine the essential details of each proposal and will consider the ranking given by the Review Panel. The Executive Committee may request oral presentations from any or all proposers. The Committee is not bound by the preliminary ranking and may change the order that the Review Panel has ranked the proposals. The Executive Committee, based on its own evaluation, shall make a recommendation to the full Board.

The Board will consider the recommendation of the Executive Committee and may move to (a) fund, (b) table for later consideration, or (c) not fund the proposal. The approval of a proposal by the Board provides approval for only the specific service provider(s). It does not provide approval for any proposed unit cost(s) or for any specific terms and conditions. The Chief Financial Officer will negotiate these details after a full review and discussion of the proposed services and costs with representatives of the proposer.

Protest Procedure

Unsuccessful proposers will be notified in writing within ten calendar (10) days of the final award decision. Proposers who are not awarded contracts may appeal the contract awarding process by submitting a written protest to the President/CEO, which clearly states the reasons for the appeal. This written protest must be received at the board office within ten (10) calendar days of notice. The President/CEO will review the protest and compare it to CSS's established procurement/evaluation procedures to decide on the appropriate action. If it is determined that the action taken in awarding contracts was appropriate and justifiable, the President/CEO will notify the protestor of the decision to deny the appeal within a 10-day period.

If it is determined that the letting of contracts was not in compliance with established procedures, or that other oversights were involved, the President/CEO will notify the protestor, and the proposal process will be re-initialized. Appropriate measures will be taken to ensure that established procedures will be followed, and contracts will be let in compliance with those procedures and all applicable laws.

In cases where the protestor is not satisfied with the President/CEO's determination, the Executive Committee may serve as the Appeals Board. The Executive Committee will follow the procedures outlined above. The Executive Committee will review the case and make a final determination. The President/CEO or Executive Committee will hear no further appeals.

Attachments:

- None

Authority:

- [CareerSource Florida Policy O124 Statewide Standardization of Tools and Services](#)
- [FloridaCommerce \(Formerly DEO\) Memorandum released 7/1/2021: Reimagining Education and Career Help Act \(House Bill 1507\) and Related Party Contracts](#)
- [CareerSource Florida Administrative Policy 087 Prior Approval Administrative Policy for Local Workforce Development Boards](#)
- Department of Labor Employment & Training Administration (ETA), WIOA Final [Rules 2 CFR Part 200](#) and [2 CFR Part 2900](#)
- [FloridaCommerce FG OGM 84 Guidance on Use of Funds for the Purchase of Outreach/Informational Items](#)

Supersession:

Supersedes and replaces Policy #01-03 R14 dated 02/05/2019.

Inquiries:

Any questions about this policy should be directed to the CEO, COO, CFAO, CTO and/or their designee.

DRAFT



Policy #03-21

Policy: Distribution of Bus Passes	Page 1 of 2
Program: Workforce Innovation and Opportunity Act (WIOA), Temporary Assistance to Needy Families (TANF), Special Grant Funding	
Section: Program Operations/Finance	
Date of Issuance: 10/14/2021	Revision Date: 1/29/2026
Distribution: CareerSource Suncoast Staff Members	

Background

The WIOA program, Welfare Transition Program and other special grant projects authorize the provision of various support payments to eligible clients. As funding permits, CareerSource Suncoast (CSS) allows these supportive services for eligible clients to assist them for successful participation and completion of activities related to obtaining and retaining employment and/or training designed to enable them to attain and/or maintain economic self-sufficiency. These benefits may be provided utilizing pre-paid bus passes. Since these bus passes are typically purchased in bulk, it is important to have a clear, auditable tracking system to assure that these resources are appropriately utilized.

Purpose

The purpose of this policy will ensure that control procedures and policies are in place to safeguard against loss or fraud related to bus passes which are distributed to clients participating in workforce programs. The policy herein will provide for consistent control of all bus passes purchased by CareerSource Suncoast staff.

Policy

Bus passes are defined as any monetary instrument procured in a purchase order form that will be issued as a supportive service/incentive activity. The purchase of any bus passes must follow CSS purchasing and procurement policy and support services policy when applicable.

Safeguarding and Internal Controls:

All CSS administrative, operational and program staff involved in the handling, issuance, and utilization of pre-paid bus passes are responsible for ensuring bus passes are safeguarded and will follow all precautions and guidelines outlined in this policy.

Any staff who take possession of pre-paid bus passes are responsible for securing the bus passes at all times, keeping them locked in designated areas when not being issued. When not in use, bus passes must remain in a locked drawer or locked cabinet. At no point are staff authorized to leave bus passes outside of a secure locked area (i.e., placed in desk drawer, left out on desk, in a car, etc.). When bus passes are being transported from one center to the other, they cannot be left unattended in a vehicle, nor can they be taken home overnight. They must immediately go from one center to the next.

Mismanagement of Bus Passes:

If it is determined that there has been mismanagement, theft and/or loss of bus passes by CSS staff, this will be immediately reported to the Chief Financial & Administrative Officer (CFAO). The CFAO will investigate circumstances and make a full report to the President/CEO. Remedies for such problems may require repayment by responsible party, filing of police reports, and a corrective action plan for persons involved up to and/or including, termination.

Once bus passes are issued to a client, any loss or theft is the responsibility of the client, and no replacement bus pass will be issued.

Inventory:

CSS will not keep an excess of bus passes on hand at any given time. Inventory counts will be based on the average three-month usage, with consideration of the number of clients in compliance at the time of the request. Each Career Services Manager/Grant Coordinator will provide finance with the appropriate number of bus passes needed for the three months.

Inventory counts are conducted on bus passes on a quarterly basis. The inventory count is conducted quarterly to ensure the inventory is accurately controlled and agrees to the financial records. This includes taking physical inventory of both passes in the safe and outstanding passes still in program staff's possession. These Reports will be turned in to the CFAO or designated accounting staff.

The Supervisor is responsible for notifying the CFAO immediately upon detecting any lost, stolen, missing or otherwise unaccounted for bus passes, and will investigate and report an outcome within one week. The supervisor will also ensure staff terminating employment with CSS will return bus passes through the log. bus passes will either be returned to accounting, or the Supervisor will transfer the bus passes to another staff member.

Issuance:

Pre- Paid bus passes will only be issued according to CSS Supportive Services Policy and Procedure Guidelines. Supervisors will ensure staff issuing bus passes will be properly trained on these CSS policy and procedures.

All bus passes must be issued on a First In/First Out basis. CSS policy dictates that the oldest bus passes are to be utilized first.

Bus Passes:

Currently, bus passes issued in our two-county area are not in a form that can be scanned. Bus passes are manually tracked. Bus pass inventory is maintained on a log sheet created by the accounting staff for each invoice when bus passes are received. Program staff will be provided a tracking log of the bus passes transferred to them for issuance for tacking purposes.

Once a bus pass is issued, staff are responsible for documenting appropriately on the log, having client sign and date receipt form and forwarding a copy to Accounting within **one business day** of the issuance.

Attachments(s):

None

Authority:

None

Supersession:

Supersedes and replaces Policy #07-02: R8 dated 07/01/2018.

Inquiries:

Any questions about this policy should be directed to the CEO, COO, CFAO, or their designee.



POLICY# 09- 21

Policy: Client Grievance and Reporting Policy and Procedure	Page 1 of 16
Program: Wagner Peyser (WP), Workforce Innovation and Opportunity Act (WIOA), Welfare Transition (WT), Trade Adjustment Assistance (TAA), and Supplemental Nutrition Assistance Program (SNAP)	
Section: Program Operations	
Date of Issuance: 1/27/2022	Revision Date: 1/29/2026
Distribution: CareerSource Suncoast Team Members	

Background

In accordance with WIOA Section 184(f),188, the 20 CFR 683.600 mandates each state and direct recipient of funds under Title I of WIOA must establish and maintain a procedure for participants and other interested parties to file grievances and complaints alleging violations of the requirements of the Workforce Innovation and Opportunity Act. Florida Commerce is responsible for implementing policy in the areas of workforce development, welfare transition, unemployment compensation, labor market information, early learning, and school readiness. The Florida Administrative Code, Chapter 60BB-1, mandates that grievance and hearing procedures be in place for grievances under the Welfare Transition (WT), Workforce Innovation and Opportunity Act (WIOA), the Trade Adjustment Assistance (TAA) Program, Supplemental Nutrition Assistance Program (SNAP) Program and/or Wagner-Peyser (WP), which allege a violation of participants' rights.

Purpose

To provide basic grievance/complaint, hearing/appeal, and incident reporting procedures for the various workforce programs provided at CareerSource Suncoast Centers to include, but not limited to: WP, WIOA, TAA, WT, and SNAP.

Policy

CareerSource Suncoast (CSS) is committed to operating all programs and activities in accordance with Federal, State, and local laws, rules, and policies. Clients and/or interested parties (e.g., contractors, One-Stop partners, One-Stop operators, and employers) affected by a decision or actions of the local workforce board have a right to file grievances/complaints with the local area Workforce Board. The grievance/complaint should be filed with CareerSource Suncoast, in accordance with the procedures outlined in this Policy.

Definitions:

- *Grievant/Complainant* – any client or other interested or personally affected party alleging a noncriminal or non-discriminatory violation of WIOA Title I requirements.
- *Interested Party*– includes applicants, clients, subgrantees, subcontractors, service providers, One-Stop partners, training providers, and other relevant parties.
- *Informal Resolution* – an opportunity to resolve complaints informally before they become grievances.

- *Complaint file* – a file that is maintained in a central location within each office, which includes a copy of each complaint filed along with pertinent documentation.
- *Compliance Review Office* – the organization within the EDD that oversees the administrative resolution of WIOA programmatic complaints.
- *Days* – consecutive calendar days, including weekends and holidays.
- *Grievance or complaint* – a written expression by a party alleging a violation of WIOA Title I, regulations promulgated under WIOA, recipient grants, subgrants, or other specific agreements under WIOA.
- *Hearing Officer* – an impartial person or group of persons that shall preside at a hearing on a grievance or complaint.
- *Local Area* – the Local Area administrative entity and its subrecipients to whom the administrative entity has delegated the grievance and complaint resolution process. CareerSource Suncoast is Manatee and Sarasota Counties local area board.
- *Client* – an individual who has been determined to be eligible to participate in and who is receiving services under a program authorized under WIOA.
- *Applicant* – an individual who has applied to a program but has not been deemed eligible to participate in and who is not currently receiving services under a program authorized under WIOA that requires eligibility determination.
- *Service Provider* – a public agency, private nonprofit organization, or private-for-profit entity that delivers educational, training, employment, or supportive services to WIOA clients.
- *Subrecipient* – an entity to which a recipient awards funds and is accountable to the recipient (or higher tier subrecipient) for the use of the funds provided.

Grievance/Complaint and Hearing/Appeal General Rules:

1. CSS serves as the administrative and fiscal entity for the WIOA, TAA, SNAP, and WT programs. If an individual has a grievance arising out of a program provided by CSS, CSS will try to resolve the matter informally. If the matter cannot be resolved, the process outlined in this policy has been adopted to provide a clear process to address an individual's grievance.
2. Any client or other interested party adversely affected by a decision or action by the local workforce system, including decisions by CSS staff, center partners and/or service providers, has the right to file a **local** grievance/complaint with CSS, with the exception of complaints alleging unlawful discrimination.
3. All local workforce grievances/complaints shall be filed with CSS **within 6 months of the occurrence of the incident** using the established procedures.
4. CSS provides clients enrolled in WIOA, WT, SNAP, TAA or receiving RESEA (WP) services with a form summarizing the client's Grievance/Conflict Hearing and Appeals Process. Informal and formal grievances are explained, and the form is signed by both the client and CSS staff.
5. In the event an individual submits a grievance/complaint **not** under the authority of CSS, CSS will notify the individual within five (5) business days from the receipt of the grievance/complaint. The grievance/complaint will be forwarded to the proper entity/agency for action. The entity's/agency's **sixty (60) day** timeframe to handle the grievance will start upon receipt of grievance/complaint.
6. Job Corps grievances/complaints should be processed according to requirements of [20 CFR 686.960](#) and [20 CFR 686.965](#) and may differ from the processes outlined in this Policy /Procedure.

Grievances Covered by This Policy

Clients applying for or receiving services at CSS, or through any other program paid for by CSS, have the right to be treated fairly and in compliance with the laws under which we operate. If a client feels they have been unfairly treated, they can file a grievance or complaint by following the process outlined in this policy. Examples of these grievances are outlined below. These examples are applicable to WIOA, TAA, SNAP, and WT/TANF grievances/complaints for reasons other than unlawful discrimination.

Grievances May Include, but Are Not Limited To:

- Program Applicants/Clients
 - Applicants who have been denied intensive or training services for reasons other than unlawful discrimination (WIOA/TAA)
 - Clients registered or enrolled in a program under WIOA, WT, or SNAP and have asked for a program service or benefit and have been denied the service or benefit in whole or in part, whether by written denial notice or not, for reasons other than unlawful discrimination.
 - Sanctioned for non-compliance with required work activities for reasons other than unlawful discrimination (WT/SNAP)
 - Denied support services for reasons other than unlawful discrimination
 - Denied education, training, or support services for reasons other than unlawful discrimination (WT)
 - Denial of for an approval or extension of a hardship or medical exemption for reasons other than unlawful discrimination (WT)
 - SNAP support service recipients who have been denied reimbursement for support services for reasons other than unlawful discrimination.
 - Clients (pursuant to WIOA Title I or the TAA) who have been sanctioned for use of a controlled substance for reasons other than unlawful discrimination. ([20 CFR 667.270](#))
- Employers/Training Providers/Interested Parties
 - Denial or termination of eligibility as a training provider for reasons other than unlawful discrimination (WIOA/TAA)
 - Denial of eligibility as an on-the-job or customized training provider/employer for reasons other than unlawful discrimination (WIOA)
- Employees
 - An individual who is a regular employee or a WIOA, TAA, WT or SNAP program client who has been displaced by a WIOA, TAA, WT or SNAP program client for reasons other than unlawful discrimination
- Any interested party, center partner, or service partner under WIOA, TAA, SNAP and/or WT who has been adversely affected by a decision or action by the CSS system, for reasons other than unlawful discrimination.

Grievances Not Covered Under This Policy:

The WIOA, TAA, SNAP and WT programs are not entitlement programs. This means that even if an individual meets the eligibility requirements to receive services under those programs, they still may be denied access to the program or denied a specific service allowable under the program rules. This is not considered a violation of the law. This may happen because:

1. The Region may not have sufficient funds to enroll the individual or any other client into a program or provide the individual/other client with a service at the time of application or need for the service. If a freeze in funding for the program or service at issue is imposed by the Regional Board, the State of Florida or the Federal government, there would be no grounds upon which to file a formal grievance. An individual may obtain a copy of the applicable local, state, or federal action freezing such funds upon request.
2. Local areas have the flexibility to decide the provision of services to offer in their local areas. These decisions are made locally by the governing board for CSS. The governing board for CSS may have decided not to offer a particular benefit or service. In such instances there would be no grounds upon which to file a formal grievance. An individual may obtain a copy of the applicable policy upon request.
3. Under WIOA rules there are eligibility requirements and prioritization criteria. Individuals who are seeking services, but who do not meet the eligibility or prioritization criteria, cannot be served with these funds. If one does not dispute the fact that they do not meet the eligibility or prioritization criteria, they do not have grounds for a formal grievance. If they wish to show that they do meet the applicable criteria, they may file a formal grievance.
4. Local Workforce Boards have the flexibility to impose requirements and specific standards applicable to programs and services. A policy that has been adopted may restrict access to a program or service or may limit the availability of the program or service. In such instances, there would be no grounds upon which to file a formal grievance. An individual may obtain a copy of the applicable policy upon request.

Note: If an individual is denied services for one of these enumerated reasons #1-4, they may still follow the informal grievance procedures prescribed but may not be entitled to a hearing before a Hearing Officer.

5. If an individual is a Welfare Transition client and their TANF cash assistance eligibility or cash benefit of food stamps or Medicaid has been reduced or terminated, they have followed the local process, and disagree with the action taken against them, but do not believe the action was taken for reasons of unlawful discrimination, they must file a grievance with the local Department of Children and Families Office.
6. DCF is responsible for providing a grievance process for complaints, except complaints of alleged discrimination, related to WT program service delivery, such as work activities, support services, diversion programs, and other workforce functions under WIOA. If the individual is under sanction for noncompliance with TANF work requirements and requests a fair hearing, CSS must attend the fair hearing, bring relevant documentation, and participate in the fair hearing process.
7. If an individual is a SNAP client and their food stamp eligibility or benefit entitlement has been reduced or terminated, they have followed the local process, and disagree with the action taken against them, but do not believe the action was taken for reasons of unlawful discrimination, they may file a grievance with the local Department of Children and Family Services. If the individual is under sanction for noncompliance with SNAP work requirements and requests a fair hearing, CSS must attend the fair hearing, bring relevant documentation, and participate in the fair hearing process.

CSS Grievance/Complaint Procedures:

This section provides standard procedures for the filing and processing of grievances against an employee, policy, WT, SNAP, TAA, or the WIOA Title I program decision administered by the CSS. It is the responsibility of CSS to establish a climate in which employees, job seekers, clients, program applicants or interested parties' problem may be promptly presented, discussed, and given fair and timely consideration. These procedures provide for prompt and equitable resolution of such grievances. The confidentiality of the grievance and any actions resulting from it are to be safeguarded.

Local WIOA, TAA, WT(TANF), SNAP E&T Programs Process:

Clients first must attempt to resolve their complaints locally with CSS through an informal complaint process.

Informal Step Process:

1. If an individual has a complaint about a program in which they participate, they must first discuss the matter with their CSS staff.
2. If they are not satisfied with the CSS staff's resolution, they may discuss the matter with their manager and attempt to resolve the complaint informally.
3. If an individual is unable to resolve their complaint through the manager, they must contact their director and allow them the opportunity to resolve the complaint. The director has thirty (30) days to resolve the complaint through the informal portion of the process.

Formal Step Process:

1. If the problem is not satisfactorily resolved, an individual can send a formal, written complaint and request for hearing by certified mail, return receipt, to:

President/CEO
CareerSource Suncoast
3660 N. Washington Blvd
Sarasota, Florida 34234

2. An individual **must** file this grievance/complaint request for a hearing in writing within six (6) months of the alleged occurrence or violation they are reporting.
3. All formal submissions must meet the following guidelines
 - a. Submissions should be concise and clearly written or typed
 - b. State the facts of the situation
 - c. State the laws or procedures of alleged violation
 - d. Any additional information believed to be relevant for review
 - e. The grievance must be signed and dated
 - f. Must include a legible address where official notices may be mailed to the grievant/complainant
 - g. Include the words **REQUEST FOR HEARING** at the top of the first page in capital letters of the formal complaint letter
 - h. Specifically state the type of violation nature of the action that is the subject of the grievance.
 - i. The grievance can be no longer than five (5) pages. Exhibits and attachments are not included in the five-page limit (i.e., emails, procedures, etc.).

- j. CSS will receive, review, and attempt to resolve the grievance/complaint informally, proceeding with the formal process. The President/CEO has fifteen (15) calendar days after receipt of the complaint to satisfactorily resolve the complaint.
- k. If the grievance/complaint cannot be resolved informally within fifteen days, then a hearing shall be set.
- l. The individual will be sent notice of hearing by certified mail w/ return receipt with at least fifteen (15) days in advance notice of the hearing date. The notice will advise them of the following:
 - i. The date, time, and location of the hearing
 - ii. The applicable sections of the law and any federal regulations involved
 - iii. That the individual may present witnesses and documentary evidence at the hearing
 - iv. That the individual may be represented by an attorney or other representative at the hearing
 - v. Notice that the individual will receive the Board's decision within sixty (60) calendar days after the official filing of the grievance/complaint.
4. CSS will record or transcribe the hearing to maintain an accurate and complete record of the hearing and documentation in the event the decision is appealed.
5. CSS will review the information presented at the hearing and notify the complainant of the board's official decision via certified return receipt mail.
6. Complainants who allege a labor standard violation will submit the complaint for binding arbitration if the collective bargaining agreement covers the parties involved.
7. Individuals with a disability needing special accommodations, or if an individual is a non-English speaker and require an interpreter, please call CSS at 941-358-4200 ext. 3112 at least five(5) business days prior to the hearing and state what special accommodation requirements are needed in order to participate in the hearing.

Note: Do NOT phone in the request. All Formal Grievances must be submitted in writing.

Filing an Appeal of CSS Decision or Lack of Action to the State (Florida Commerce):

An individual has the right to file an appeal to Florida Commerce if/when the following occur:

- The grievance/complaint is not for reasons of unlawful discriminations.
- After CSS has conducted a hearing but the grievant/complainant, are dissatisfied with or have been adversely affected by the Hearing Officer's decision
- CSS has not conducted a hearing within the required 60-day timeframe
- CSS conducted the hearing but has not issued a decision within the mandated sixty (60) calendar day timeframe
- CSS has been non-responsive to the complaint; the required 60-day period for CSS to act has elapsed

If one of the above applies, an individual may appeal the decision with FloridaCommerce. To file an appeal:

1. An individual must make a written request for a formal hearing/appeal within 30 days of the CSS Hearing Officer's decision, or within thirty (30) days after the required sixty (60) day timeframe for CSS to act has elapsed. This request must be sent by certified mail, return receipt, to:

FloridaCommerce
Office of General Counsel
Caldwell Building - Suite 150
107 East Madison Street
Tallahassee, Florida 32399.

2. The request for a hearing/appeal must be clearly titled "Request for Hearing/Appeal."
3. The grievance can be no longer than five (5) pages. Exhibits and attachments are not included in the five-page limit (i.e., emails, procedures, etc.)
 - a. Include the written decision made by CSS from the local hearing
 - b. Submissions should be concise and clearly written or typed
 - c. State the facts of the situation
 - d. State the laws or procedures of alleged violation
 - e. Any additional information believed to be relevant for review
 - f. The grievance should be signed and dated
 - g. Must include a legible address where official notices may be mailed to the grievant/complainant
4. The State can return the grievance/complaint to the CSS to hold a hearing or impose other remedies to resolve the grievance/complaint.

Review and Hearing Process at State Level:

The state administrative entity will hear initial complaints or grievances regarding actions taken or decisions made by the state administrative agency for reasons other than alleged unlawful discrimination. Upon receipt, the state shall review and attempt to informally resolve the WIOA, TAA, TANF/WT, and SNAP grievance/complaint.

At the state administrative entity level, the Agency Head or his/her designee is the presiding officer and shall conduct all hearings of original state level complaints.

- 1) Within five (5) business days of receipt of appeal notice, FloridaCommerce agency heads, or their designee will notify the complainant and CSS that an appeal has been filed.
- 2) The state will review the submission and attempt to find an informal solution for the complaint.
- 3) If an informal resolution cannot be made, then the Agency Head or designee will act as Presiding Officer and begin the formal grievant process, and a hearing will be scheduled.
- 4) Each party shall be given a hearing notice to formally attempt to resolve the complaint.

- 5) The hearing notice shall advise the following:
 - a. The date, time, and place of the hearing
 - b. The pertinent sections of WIOA, TAA, WT/TANF, SNAP, or any other federal regulations involved
 - c. Affected parties may present witnesses or documentary evidence at the hearing
 - d. Affected parties may be represented at the hearing by an attorney or other representative
- 6) FloridaCommerce agency heads, or their designee shall issue a decision within sixty (60) calendar days of receipt of the appeal request.

The hearing shall be conducted in compliance with rules of procedure as contained in Chapter 28-106, Parts I, II, and III, Florida Administrative Code, incorporated herein by reference. The Presiding Officer will schedule a hearing, complete the hearing, and issue a decision within the required sixty calendar days of receipt of complaint/grievance.

Individuals with a disability needing reasonable accommodations shall call the State Administrative Entity Process Manager at (850) 245-7105 at a minimum of five (5) business days prior to the hearing and indicate what special accommodations are needed in order to participate in the hearing.

Remedies

The remedies that may be imposed under WIOA grievances/complaints (other than those alleging unlawful discrimination) shall be limited to:

- Suspension or termination of payments under WIOA Title I
- Prohibition of placement of a client with an employer that has violated any requirement under WIOA Title I
- Reinstatement of an employee, payment of lost wages and benefits, and re-establishment of other relevant terms, conditions, and privileges of employment, where applicable
- Other equitable relief, where appropriate

State (FloridaCommerce) Appeal Review of Local Hearing Officer's Decision:

A grievant/complainant may file an appeal of CSS's decision/final order if they are dissatisfied with or have been adversely affected by CSS's Hearing Officer's decision for reasons other than unlawful discrimination. The grievant/complainant must make a written request for an appeal within 30 days of the CSS Hearing Officer's decision. This request must be sent by certified mail, return receipt, to:

FloridaCommerce
Office of General Counsel
Caldwell Building - Suite 150
107 East Madison Street
Tallahassee, Florida 32399

Within (5) five business days of receipt of appeal notice, the States Agency Head or their designee will notify each party that an appeal has been filed. Each party will be given fifteen calendar days from the date of the notice to submit written argument and provide supporting documentation. Only unaltered, verbatim transcripts of the original hearing evidence and other proof introduced at the initial hearing will be considered for purposes of the appeal.

The party submitting the transcript must bear all expenses of the transcription and deliver a copy of the transcript to the Agency Head and the opposing party. If a stenographer authorized to administer oaths has not recorded the proceedings and prepared the transcript, an exact copy of the tape recording, video, or other recording must also be delivered to the Agency Head and the parties, along with the transcript. The party submitting the transcript and the recording must include a certification that the transcript is verbatim, and the recording is of the entire proceeding and has not been altered. The Agency Head will not consider a transcript when the foregoing procedure has not been followed.

The Agency Head or his/her designee shall issue a decision within sixty calendar days of receipt of the appeal request.

Judicial Review Period of Final Order:

The FloridaCommerce designee will issue a final order, which will be subject to a judicial review period and the Florida Rules of Appellate Procedure, Rules 9.110 and 9.190. An individual can file an appeal of the State (FloridaCommerce) decision if they are dissatisfied with or have been adversely affected by the FloridaCommerce Hearing Officer's decision; or the State has not conducted a hearing; or has conducted the hearing but has not issued a decision within the mandated sixty (60) calendar day timeframe.

The appeal must be filed within thirty (30) calendar days of receipt of the State's decision; or after the mandated sixty (60) calendar days have elapsed for the State to have issued a decision. The Request for Review/Appeal shall be filed with the following agency/entity:

1. WIOA and TAA appeals of state decisions may be filed with the U.S. Department of Labor (USDOL) using the Federal Level Appeal Procedures noted in the *Federal Level Appeal Process* section below.
2. TANF work activity and support services appeals may be filed according to the Rules of Appellate Procedure, Rules 9.110 and 9.190(b).

Federal Level Appeal Process:

Under WIOA regulations, 20 CFR Section 683.600, if the State has not issued a decision on a case that does not deal with allegations of unlawful discrimination within the required sixty (60) calendar-day timeframe, the grievant can file an appeal to the USDOL. The appeal must be filed with the USDOL no later than one hundred and twenty (120) calendar days of the filing of the grievance with the State, or the filing of the appeal of a local grievance with the State.

An appeal must be filed within sixty (60) days of the receipt of the decision being appealed in cases where a decision has been reached and the party to which such a decision has been adversely impacted wishes to appeal to the Secretary.

All appeals must be submitted by certified mail, return receipt requested to:

Secretary, U.S. Department of Labor
200 Constitution Avenue NW
Washington, D.C. 20210
Attention: Assistant Secretary of ETA

A copy of the appeal must be simultaneously provided to the appropriate ETA Regional Administrator and the opposing party.

Atlanta Regional Office
61 Forsyth St, SW, Ste 7B54
Atlanta, GA 30303
Attn: Florida ETA Regional Administrator

The secretary must make a final decision on an appeal no later than one hundred and twenty (120) days after receiving the appeal request. Grievances or complaints filed directly with the Secretary that were not previously filed with the Local Area and/or state will be remanded to the Local Area or State, as appropriate.

Wagner-Peyser Employment Service Complaints:

Federal regulations [20 CFR Part 658.410](#) provide that each state shall establish and maintain an employment service complaint system that includes procedures at the local, State and Federal level for processing complaints related to Wagner-Peyser Employment Service (ES) that do not allege unlawful discrimination. Employment Services (ES) Complaints may be accepted in any CSS one-stop center, or elsewhere by outreach staff.

These complaints are handled by the Career Services manager or assigned Complaint Specialist. The Manager/Specialist will maintain a separate file for each complaint and enter the complaint on the Complaint Log. The complaint log includes the following information:

- The name of the complainant
- The name of the respondent (employer or State agency)
- The date the complaint was filed
- If the complaint is by or on behalf of a migrant seasonal farmworker (MSFW)
- Type of Complaint (employments-related law or the ES regulations)
- The action taken, formal or informal, to include the resulting resolution. When a client presents an ES complaint the following will occur:
 - CSS staff will request all the information perceived to be necessary to investigate the complaint
 - Request that the complainant indicate all the physical addresses, email, and telephone numbers through which they might be contacted during the investigation of the complaint
 - Request that the complainant contact the Complaint System Representative before leaving the area if possible and explain the need to maintain contact during the investigation

CareerSource Suncoast will work to resolve the complaint related to Migrant Seasonal Farm Workers (MSFW) within five (5) days through an informal process. Any complaint not related to MSFW must be elevated to the appropriate authorities.

The complaint is considered to be resolved when the complainant is satisfied with an acceptable outcome; the complainant chooses not to elevate to the next level; or when the complainant has not responded within twenty (20) business days after correspondence has been mailed for ES complaints and within forty (40) business days for MSFW complaints.

If the ES complaint is not resolved within five (5) business days, then the complaint and associated file documents are forwarded to the:

FloridaCommerce
Office of Career Center and Program Support
Caldwell Building–Suite 150
107 East Madison Street
Tallahassee, Florida 32399-4133
Attention: ES Complaint Coordinator

The complaint logs must be submitted within five days after the end of the quarter; the local Career Services managers will mail the Complaint Logs to the Senior Monitor Advocate at the address listed below:

FloridaCommerce
State Monitor Advocate Office
Attention: Senior Monitor Advocate
Caldwell Building – Suite 150
107 East Madison Street
Tallahassee, Florida, 32399-4133

The staff must ensure the complainant (or their representative) submits the complaint on the Complaint/Referral Form or another complaint form prescribed or approved by FloridaCommerce or submits complaint information which satisfies the parameters outlined in [20 CFR Part 658.410](#).

The complaint and associated file documents will be forwarded the address below for resolution at the state level:

FloridaCommerce
Office of Career Center and Program Support
Caldwell Building - Suite 150
107 East Madison Street
Tallahassee, Florida 32399
Attention: ES Complaint Coordinator

Special handling procedures are required for complaints filed by Migrant Seasonal Farm Workers (MSFW) that do not allege unlawful discrimination. The Sate Monitor Advocate are designated to handle MSFW complaints. (20CFR 658.40 (6)(h)) CSS will forward the complaint form and copies of all documents to the Senior Monitor Advocate. MSFW complaints involving an allegation of noncompliance with assurances regarding wage and hour law, or other employment conditions are to be forwarded to the nearest USDOL Wage and Hour office.

U.S. Department of Labor
Wage and Hour Division
4200 W Cypress Street, Suite 444.
Tampa, FL 33607

Alternately check the USDOL web site [Local Offices | U.S. Department of Labor \(dol.gov\)](https://www.dol.gov) to find the nearest office.

MSFW violations of Occupational Safety and Health Administration (OSHA) Directive's complaints should be forwarded to USDOL, Occupational Safety and Health Administration to the address listed below:

U.S. Department of Labor
Occupational Safety and Health Administration
200 Constitution Avenue, N.W.
Washington, D.C. 20210

Employment Related Law Complaints:

When a complaint is filed regarding an employment-related law concern, CSS must determine if the complainant is an MSFW. If the complainant is a non-MSFW, the office must immediately refer the complainant to the appropriate enforcement agency, another public agency, a legal aid organization, and/or a consumer advocate organization, as appropriate, for assistance. Upon completing the referral, the local or State representative is not required to follow up with the complainant.

Discontinuation of Services to Employers:

The following conditions are identified in [20 CFR 658.501\(a\)](#) as the basis for discontinuation of services to employers:

1. Employer Submit and refuse to alter or withdraw job orders containing specifications which are contrary to employment-related laws
2. Employer Submit job orders and refuse to provide assurances, in accordance with the Agricultural Recruitment System for U.S. Workers at part 653, subpart F, of this chapter, that the jobs offered are in compliance with employment-related laws, or to withdraw such job orders
3. Are found through field checks or otherwise to have either misrepresented the terms or conditions of employment specified on job orders or failed to comply fully with assurances made on job orders
4. Are found by a final determination by an appropriate enforcement agency to have violated any employment-related laws and notification of this final determination has been provided to the Department or the SWA by that enforcement agency
5. Are found to have violated ES regulations pursuant to [20 CFR 658.411](#)
6. Refuse to accept qualified workers referred through the clearance system
7. Refuse to cooperate in the conduct of field checks conducted pursuant to [CFR 20 653.503](#)
8. Repeatedly cause the initiation of the procedures for discontinuation of services pursuant to [20 CFR 658.501\(a\)\(1-7\)](#)

CSS may discontinue services immediately if, in the judgment of the State Administrator, exhaustion of the administrative procedures outlined above would cause substantial harm to a significant number of workers. In such instances, procedures at [§§ 658.503](#) and [658.504](#) must be followed.

More detail on the ES Complaint System (20 CFR sections 658.411-418) can be found in the [Complaint Resolution Handbook](#), e.g., the completion of the complaint filing, assigning, and handling ES related complaints, complaint resolution, referrals, hearings, etc. Also, a list of referral agencies is available in the Complaint Resolution System Handbook that has been provided to each Regional Workforce Board, local Representative, and Career Center.

Note: Nothing included in this policy precludes a grievant or complainant from pursuing a remedy authorized under another Federal, State, or local law.

Criminal Fraud and Abuse:

In Accordance with 20 CFR 683.620 the process for reporting criminal fraud and abuse. Information and grievances involving criminal fraud, waste, abuse, or other criminal activity must be reported immediately through the U.S. Department of Labor’s (USDOL) Incident Reporting System. The complaint should be mailed or phoned:

USDOL Office of Inspector General
Office of Investigations
Room S-5514
200 Constitution Avenue NW
Washington, D.C. 20210
<i>Or</i>
USDOL Hotline: 1-800-347-3756

The complaint can also be made to the corresponding Regional Inspector General for Investigations, with a copy simultaneously provided to the Employment and Training Administration. Procedures for reporting such incidents and instructions for completing the incident reporting form can be found at the following web site: [General Complaint Form - FloridaJobs.org](http://FloridaJobs.org).

USDOL Southeast Regional Inspector General for Investigations
Office of Investigations
Sam Nunn Atlanta Federal Center
61 Forsyth Street SW, Suite 6T1
Atlanta, Georgia 30303.

These complaints should also be reported at the local level to the CareerSource Suncoast Board Chair. Any such concern can be reported to the: **Integrity Hotline at 941-479-6321** to the attention of the Board Chair.

In addition to the Integrity Hotline, to facilitate reporting of suspected violation where the reporter wishes to remain anonymous, a written statement may be submitted to the Chief Executive Officer (CEO) by mailing to:

ATTN: President/CEO
CareerSource Suncoast
3660 N. Washington Blvd.
Sarasota, FL 34234

Discrimination Grievances:

The complaint procedures for charges of discrimination are separate and distinct from the grievance procedures outlined elsewhere in this document.

Discrimination on the basis of race, color, ethnic characteristics, disability, actual or perceived religion, sex, national origin, shared ancestry, age, marital status, political affiliation or belief, participation in any WIOA Title I financially assisted program or activity, or on the basis of citizenship or status as a lawfully admitted immigrant authorized to work in the United States is prohibited under federal and/or state laws.

A complaint of alleged discrimination may be filed by any person, including (but not limited to) any employee, applicant for employment, or customer of a Center, Center operator, training provider, or other program or activity that is offered through the Center system, who feels he or she, or any specific “class of individuals” (group of people), has been subjected to unlawful discrimination by a program or activity offered through the Center system, or by the FloridaCommerce or CSS.

If an individual believes they or someone they know has been subjected to unlawful discrimination, complaints may be filed with the CSS Equal Opportunity Officer (EOO). The contact information for the current CSS Equal Opportunity Officer can be found on the CSS website at [Policies – CareerSource Suncoast](#) under the Equal Opportunity and Non-Discrimination Notice section. Instructions for filing a complaint are posted on the website. CSS will attempt to resolve the complaint within five (5) days of receipt of the complaint.

To file complaints directly with the state, the complaint must be filed in accordance with FloridaCommerce Discrimination-Complaints Procedures. The discrimination complaint procedures are available on the FloridaCommerce Website [Home - FloridaJobs.org](#) at [Time Limits for Filing a Discrimination Complaint - FloridaJobs.org](#).

For reporting to the federal level, the appropriate program contacts are outlined below.

WIOA and Wagner Peyser Programs:

In accordance with [20 CFR 658.411](#), Under Wagner-Peyser, discrimination complaints may be filed directly with a local-office equal opportunity officer (EEO), when such has been designated and trained, with the state agency having administrative responsibility for Wagner-Peyser programs, or with the Civil Rights Center, U.S. Department of Labor.

The CSS office Equal Opportunity Officer contact information is noted on page #13 of this policy. Questions about or complaints alleging a violation of the non-discrimination provisions of WIOA sec.188 may be directed or mailed, faxed, or emailed to the Civil Rights Center (CRC):

Director, Civil Rights Center
ATTENTION: Office of External Enforcement
U.S. Department of Labor
Room N4123
200 Constitution Avenue NW.
Washington, DC 20210

Fax: (202)693-6505
ATTENTION: Office of External Enforcement
Email: CRCEXternalComplaints@dol.gov

If an individual is a person with a disability and require auxiliary aids and services in order to file a complaint, to access the CRC complaint form, or during the CRC complaint process, please contact the office of Civil Rights at CRCEXternalComplaints@dol.gov or by phone at (202)-693-6500 or TTY/TRS 1-800-877-8339.

SNAP- Discrimination Complaints

Any person who believes he or she, or any specific class of individuals (including employees of and applicants for employment with an agency administering the SNAP program), has been subjected to unlawful discrimination under SNAP program may file a complaint in accordance with FloridaCommerce Discrimination-Complaint Procedures. Under the SNAP program, in accordance with [7 CFR part 15](#) individuals who believe that they have been subject to discrimination may file a written complaint to:

United States Department of Agriculture
Office of the Hearing Clerk
Room 112
Administration Building
Washington, D.C. 20250

Under Florida law, employees or applicants may also choose to file employment complaints with the Florida Commission on Human Relations. (Reference: Section 760.06, F.S.)

Health and Safety Grievances:

Health and safety standards which have been established under both Federal and/or State law which apply to the working conditions of employees are also applicable to clients of programs and activities under WIOA Title I and clients in employment activities. **CSS does not hear complaints related to health and safety.** If an individual has a complaint related to a health or safety matter, they may file the complaint with:

FloridaCommerce
Office of General Counsel
Caldwell Building, MSC 110
107 East Madison Street
Tallahassee, Florida 32399-4128
(850) 245-7150

They may also file a health and safety complaint with:

U.S. Department of Labor
Occupational Safety and Health Administration
200 Constitution Avenue, N.W.
Washington, D.C. 20210

The OSHA website [File a Complaint | Occupational Safety and Health Administration \(osha.gov\)](http://www.osha.gov) provides additional information on the various methods in which an individual can file a complaint. (i.e., mail, fax, phone, in person, etc.). For more information regarding health and safety issues, visit the Occupational Safety and Health Administration’s Website at <http://www.osha.gov> or the Florida Department of Health Website at <http://www.doh.state.fl.us>. **Local, State, and Federal Agency**

Contacts:

Contact the following entities for discrimination, employment, health and safety, or Florida law violations/complaints:

<p>Florida Commission on Human Relations Florida Law Violations 4075 Esplanade Way, Room 110 Tallahassee, Florida 32399 Phone:(850) 488-7082 Toll free:1-800-342-8170 Florida Relay Service Voice (statewide) 711 Contact Us — Florida Commission on Human Relations (myflorida.com)</p>	<p>U. S. Department of Labor, Civil Rights Center Discrimination Complaints 200 Constitution Avenue NW Room N-4123 Washington, D. C. 20210 How to File a Complaint with External Enforcement U.S. Department of Labor (dol.gov)</p>
<p>U. S. Equal Employment Opportunity Commission (EEOC) Employment Complaints Miami District Office Miami Tower 100 SE 2nd Street, Suite 1500 Miami, FL 33131 Phone: (305) 808-1763 Toll Free: 1-800-669-4000 TTY: 1-800-669-6820 Miami District Office U.S. Equal Employment Opportunity Commission (eeoc.gov)</p>	<p>USDOL Occupational Safety and Health Administration (OSHA) Safety and Health Violations 200 Constitution Avenue NW Washington, D.C. 20210 Phone:1-800-321-6742 TTY 1-877-889-5627 File a Complaint Occupational Safety and Health Administration (osha.gov)</p> <p>Regional Office Sam Nunn Atlanta Federal Center 61 Forsyth Street, SW Room 6T50 Atlanta, GA 30303 Phone: (678) 237-0400</p> <p>Local Office: Tampa Area Office 5807 Breckenridge Parkway, Suite A Tampa, FL 33610-4249 Phone: (813) 626-1177</p>
<p>U. S. Equal Employment Opportunity Commission (EEOC) Employment Complaints Tampa Area Office 501 East Polk Street, Suite 1000 Tampa, Florida 33602 Phone:(813) 228-2310 Toll Free: 1-800-669-4000 Toll Free: 1-800-669-4000 TTY: (813) 228-2003 Tampa Field Office U.S. Equal Employment Opportunity Commission (eeoc.gov)</p>	<p>USDOL Office of Inspector General, Office of Investigations 200 Constitution Avenue NW Room S-5014 Washington, D.C. 20210 Office of Inspector General U.S. Department of Labor - Contact OIG (dol.gov)</p>

Attachments(s):

None: All forms associated with this Policy are stored on CSS SharePoint folders.

AUTHORITY:

- Office of Inspector General [Office of Inspector General U.S. Department of Labor - Contact OIG \(dol.gov\)](#)
- [20Code of Final Rule- What local are, State , and Direct recipient grievance procedures must establish](#)
- [eCFR: 20 CFR Chapter V -- Employment and Training Administration, Department of Labor](#)
- [FloridaCommerce Final Guidance Grievance/Complaint and Hearing/Appeal Procedures](#)
- TANF State Plan [TANF-Plan.pdf \(myflfamilies.com\)](#)
- Florida Administrative Code [60BB-1: WORKFORCE PROGRAMS' GRIEVANCE, COMPLAINT, HEARING AND APPEAL PROCEDURES - Florida Administrative Rules, Law, Code, Register - FAC, FAR, eRulemaking \(flrules.org\)](#)

Supersession:

This policy supersedes and replaces Policy# 1-06R5 Customer Grievance/Complaint, Hearing/Appeal, and Criminal Fraud/Abuse Incident Reporting Procedures dated 02/10/2014.

Inquiries:

Any questions about this policy should be directed to the CEO, COO, CFAO and/or their designee.

DRAFT



POLICY# 01-25

Policy: Whistleblower	Page 1 of 1
Program: Wagner Peyser (WP), Workforce Innovation and Opportunity Act (WIOA), Welfare Transition (WT), Special Grants, and Supplemental Nutrition Assistance Program (SNAP)	
Section: Operations	
Date of Issuance: 1/29/2026	Revision Date:
Distribution: Public	

Background

Individuals who blow the whistle on fraud and abuse within state government are protected by law. Sections 112.3187-- 112.31895 of the Florida Statutes (F.S.) constitute the law known as the "Whistleblower's Act." The legislative intent of the Whistle-blower's Act is to prevent agencies or independent contractors from taking retaliatory action against an employee who reports agency violations of law that create a substantial and specific danger to the public's health, safety, or welfare. It is also the intent of the legislature to prevent agencies or independent contractors from taking retaliatory action against an employee who discloses information alleging improper use of government office, gross waste of funds, or any other abuse or gross neglect of duty on the part of an agency, public officer, or employee.

Purpose

CareerSource Suncoast (CSS) requires CSS staff, board members, contractors, and volunteers to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. As staff and representatives of the CSS, we must practice honesty and integrity in fulfilling our responsibilities and comply with all applicable laws and regulations. The purpose of this policy is to set forth guidance regarding Whistleblower procedures and processes in the workplace. This policy is intended to encourage staff (paid and volunteer), board members, partners, service providers, contractors, customers, and others to report suspected or actual occurrence(s) of illegal, unethical, or inappropriate events (behaviors or practices) without retribution.

This policy does not preclude or circumvent Workforce Programs' Grievance/Complaint and Hearing/Appeal Policy and Procedures and adherence to the Code of Conduct and Ethics.

Policy

CUSTOMERS:

It is the intent of CareerSource Suncoast (CSS) to adhere to all laws and regulations that apply to the organization, and the underlying purpose of this Policy is to support the organization's goal of legal compliance. The support of all customers is necessary to achieve compliance with various laws and regulations.

If any customer reasonably believes that some policy, practice, or activity of CSS is in violation of law, unethical or inappropriate, a complaint may be filed by that customer with the organization. Any such concern should be directed to the **Integrity Hotline at 941-479-6321** to leave a confidential voicemail message for the Board Chair.

All customers are protected from retaliation only if the customer brings the alleged unlawful activity, policy, or practice to the attention of the Board Chair and provides a reasonable opportunity to investigate and correct the alleged unlawful activity. The protection described below is only available to customers that comply with this requirement.

CareerSource Suncoast (CSS) will not retaliate against a customer:

- Who, in good faith, has made a protest or raised a complaint against some practice of CSS, or of another individual or entity with whom CSS has a business relationship, on the basis of a reasonable belief that the practice is in violation of law or a clear mandate of public policy.
- Who discloses or threatens to disclose to a supervisor or a public body any activity, policy, or practice of CSS that the customer reasonably believes is in violation of a law, or a rule, or regulation mandated pursuant to law or is in violation of a clear mandate or public policy concerning health, safety, welfare, or protection of the environment.

STAFF and NON-CUSTOMERS:

CSS staff, board members, partners, contractors, and volunteers are encouraged to report suspected fraudulent or dishonest conduct pursuant to the procedures set forth below:

Reporting:

CSS staff and volunteer complaints about possible fraudulent or dishonest use or misuse of resources or property can also be reported to his or her supervisor or, if suspected by a volunteer, to the staff member supporting the volunteer's work. If for any reason a person finds it difficult to report his or her concerns to a supervisor or staff member supporting the volunteer's work, the person may report the concern directly any CSS Chief Executive Officer. Alternately, to facilitate reporting of suspected violations where the reporter wishes to remain anonymous, a written statement may be submitted to one of the individuals by mailing to:

**CareerSource Suncoast
3660 N. Washington Blvd.
Sarasota, FL 34234**

CSS staff in addition to the board members and contractors can contact the Board Chair to leave a confidential voicemail message regarding the concern on the **Integrity Hotline at 941-479-6321**.

CSS and its contractors shall not discharge, demote or otherwise discriminate against CSS staff as a reprisal for disclosures by the CSS staff of information that the CSS staff reasonably believes is evidence of: (a) gross mismanagement of a contract or grant relating to funds; (b) a gross waste of funds; (c) a substantial and specific danger to public health or safety related to the implementation or use of funds; (d) an abuse of authority related to implementation or use of funds; (e) a violation of law, rule, or regulation related to a contract, including the competition for or negotiation of a contract or grant, awarded or issued relating to funds; or (f) unethical or inappropriate events (behaviors or practices).

Whistleblower Protection:

Whistleblower definition: CSS staff, board members, contractors, partners, customers or volunteers who informs any CSS supervisor, director, Chief Executive Officers, or Board of Directors Chair about an activity relating to CSS which that person believes to be fraudulent or dishonest.

Reference: Sections 112.3187 – 112.31895, Florida Statutes (F.S.), the Sarbanes-Oxley Act of 2002.

CSS will protect whistleblowers as defined below:

- CSS will use its best efforts to protect whistleblowers against retaliation. Whistle-blowing complaints will be handled with sensitivity, discretion, and confidentiality to the extent allowed by the circumstances and the law. Generally, this means that whistleblower complaints will only be shared with those who have a need to know so that CSS can conduct an effective investigation, and in appropriate cases, with law enforcement personnel. Should disciplinary or legal action be taken against a person or persons as a result of a whistleblower complaint, such persons may also have right to know the identity of the whistleblower.
- Staff, contractors, and volunteers of CSS may not retaliate against a whistle-blower for informing management about an activity which that person believes to be fraudulent or dishonest with the intent or effect of adversely affecting the terms or conditions of the whistleblower's employment, including but not limited to, threats of physical harm, loss of job, punitive work assignments, or impact on salary or fees. Whistleblowers who believe that they have been retaliated against may file a written complaint to any CSS Chief Executive Officer, or the Board Chair. Any complaint of retaliation will be promptly investigated and appropriate corrective measures taken if allegations of retaliation are substantiated. This protection from retaliation is not intended to prohibit supervisors from taking action, including disciplinary action, in the usual scope of their duties and based on valid performance-related factors.
- Whistleblowers must be cautious to avoid baseless allegations, which are defined as allegations made with reckless disregard for their truth or falsity. People making such allegations may be subject to disciplinary action by CSS and/or legal claim by individuals accused of such conduct.

Attachments:

- None

Authority

- [Florida Statute 112.3187 Adverse action against and employee](#)
- [WIOA Public Law](#)

Supersession:

Supersedes and replaces Whistleblower Policy #13-01 R3 dated 10/2/2018.

Inquiries:

Any questions about this policy should be directed to CSS Chief Executive Officers and/or their designee.



ACTION ITEM

Acceptance of Financial Audit Report for
Program Year Ending June 30, 2025
James Halleran, James Moore & Co.

Suncoast Workforce Board, Inc.
DBA: CareerSource Suncoast
Audit for the Year Ended June 30, 2025



Overview

- ❖ Thank You and Audit Process

Independent Auditor Reports on:

- ❖ Financial Statements (pages 1-3) - Unmodified Opinion
- ❖ Internal Control and Compliance (pages 17-18) - No findings
- ❖ Compliance and Internal Control over Major Federal Program(s) (pages 19-21) – No findings, Major Program for FY2025 is the WIOA Cluster.
- ❖ Florida Department of Commerce Compliance Testing (page 23) – No areas of noncompliance noted.

Required Communications

- ❖ Our Responsibility in Relation to Financial Statement Audit
- ❖ Significant Disclosures
 - Note 5c – Significant Funding Source - 96%
 - Note 6 – Related Party Transactions
 - Note 9 – Liquidity and Availability - \$1.65M
 - Note 10 – Contingencies
- ❖ Significant Difficulties Performing Audit, Disagreements with Management - None
- ❖ Audit Adjustments – none noted
- ❖ Passed Audit Adjustments – One passed adjustment
 - \$43k passed adjustment to record right of use asset and operating lease liability
- ❖ Current Year Recommendations
 - No other current year recommendations.

Financial Highlights

- ❖ Revenues - \$7,375,172
 - Grants: Decrease of \$294k (-4%) from prior year
- ❖ Expenses - \$7,445,697
 - Decrease of \$238k (-3%) from prior year
- ❖ Net Assets - \$806,215
 - Total: Decrease of \$71k from prior year (all Undesignated)



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

FINANCIAL STATEMENTS

**JUNE 30, 2025 WITH SUMMARIZED
INFORMATION AS OF JUNE 30, 2024**

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, 2025, 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, 2025, 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, 2024, financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated January 23, 2025. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2024, 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 solely 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 effectiveness of 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.

Daytona Beach, Florida
January 1, 2030

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
STATEMENT OF FINANCIAL POSITION
JUNE 30, 2025 WITH SUMMARIZED
INFORMATION AS OF JUNE 30, 2024**

	2025	2024
<u>ASSETS</u>		
Current assets		
Cash and cash equivalents	\$ 1,122,349	\$ 1,025,294
Certificates of deposit	415,000	500,009
Accounts receivable	3,515	-
Grants receivable	111,932	72,359
Prepaid expenses	6,962	45,427
Total current assets	1,659,758	1,643,089
Noncurrent assets		
Fixed assets		
Furniture and equipment	323,246	323,246
Accumulated depreciation	(323,246)	(323,246)
Net fixed assets	-	-
Total Assets	\$ 1,659,758	\$ 1,643,089
<u>LIABILITIES AND NET ASSETS</u>		
Current liabilities		
Accounts payable	\$ 68,468	\$ 78,798
Accrued expenses	146,464	123,220
Accrued leave	237,405	235,471
Refundable advances	363,602	328,860
Total current liabilities	815,939	766,349
Total Liabilities	815,939	766,349
Net assets		
Without donor restrictions:		
Undesignated	843,819	876,740
Total Net Assets	843,819	876,740
Total Liabilities and Net Assets	\$ 1,659,758	\$ 1,643,089

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, 2025 WITH SUMMARIZED
INFORMATION FOR THE YEAR ENDED JUNE 30, 2024**

	2025	2024
	Without Donor Restrictions	Without Donor Restrictions
Support and Revenue		
Contract and grant revenue	\$ 7,108,090	\$ 7,439,237
Rental revenue	7,968	11,203
Other revenue	259,114	448,010
Total support and revenue	7,375,172	7,898,450
Expenses		
Program services	6,805,034	7,061,759
General and administrative	640,663	621,996
Total expenses	7,445,697	7,683,755
Change in net assets without donor restrictions	(70,525)	214,695
Net assets without donor restrictions, beginning of year	876,740	662,045
Net assets without donor restrictions, end of year	\$ 806,215	\$ 876,740

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, 2025 WITH SUMMARIZED
INFORMATION FOR THE YEAR ENDED JUNE 30, 2024

	<u>2025</u>	<u>2024</u>
Cash flows from operating activities		
Cash received from grantors, contractors and contributors	\$ 7,404,430	\$ 7,906,103
Cash paid to employees and vendors	(7,392,384)	(7,643,463)
Interest received	-	16,485
Net cash provided by (used in) operating activities	<u>12,046</u>	<u>279,125</u>
Cash flows from investing activities		
Proceeds from maturity of certificate of deposit	105,009	-
Purchases of certificates of deposit	(20,000)	(25,009)
Net cash provided by (used in) investing activities	<u>85,009</u>	<u>(25,009)</u>
Net increase (decrease) in cash and cash equivalents	<u>97,055</u>	<u>254,116</u>
Cash and cash equivalents, beginning of year	1,025,294	771,178
Cash and cash equivalents, end of year	<u><u>\$ 1,122,349</u></u>	<u><u>\$ 1,025,294</u></u>
Reconciliation of change in net assets		
to net cash provided by (used in) operating activities		
Change in net assets	<u>\$ (32,921)</u>	<u>\$ 214,695</u>
Adjustments to reconcile change in net assets		
to net cash provided by (used in) operating activities:		
Decrease in grants receivable	(39,573)	(37,207)
(Increase) decrease in accounts receivable	(3,515)	4,159
(Increase) decrease in prepaid expenses	38,465	(6,624)
Increase (decrease) in accounts payable	(10,330)	17,174
Increase (decrease) in accrued expenses	23,244	11,340
Increase (decrease) in refundable advances	34,742	57,186
Increase (decrease) in accrued leave	1,934	18,402
Total adjustments	<u>44,967</u>	<u>64,430</u>
Net cash provided by (used in) operating activities	<u><u>\$ 12,046</u></u>	<u><u>\$ 279,125</u></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, 2025

(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 two One-Stop Career Centers located in Sarasota and Palmetto, 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, 2025

(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 with 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, 2025.

SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025

(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, 2025, \$363,602 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, 2025

(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 \$237,405, at June 30, 2025.

(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 two certificates of deposit with federally insured banks. They are valued at cost plus accrued interest and mature in 2026.

(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 2025. 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) **2024 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, 2024, from which the summarized information was derived.

(3) **Subsequent Events:**

The Organization has evaluated events and transactions for potential recognition or disclosure in the financial statements through January 1, 2030, the date which the financial statements were available to be issued. No subsequent events have been recognized or disclosed.

SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025

(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 \$236,178 for the year ended June 30, 2025.

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

(a) **Cash and cash equivalents**—At June 30, 2025, the Organization had demand and time deposits with multiple financial institutions of \$1,537,349. The bank balance of these demand and time deposits was \$1,574,809 at June 30, 2024. 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, 2025, the Organization received approximately 96% 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 and other funding received directly from 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, 2025, 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, 2025, total payments for providing training to participants, dues, and outreach payments were \$436,329, and \$10,000 was payable at year-end.

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025**

(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:

Expense	Method of Allocation
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, 2025, the Organization recognized rental income from properties leased to others in the amount of \$7,968. The following is a schedule of future rentals under non-cancellable operating leases at June 30, 2025. 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:

Year Ending June 30,	Rental Revenue
2026	\$ 3,954

SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025

(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	\$ 1,122,349
Certificates of deposit	415,000
Grants receivable	111,932
Accounts receivable	3,515
Total	<u>\$ 1,652,796</u>

The Organization has \$1,652,796 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, 2025**

Federal Grantor/Pass-Through Entity/ Federal Program or Cluster Title	Federal Assistance Listing Number	Pass-Through Entity Identification Number	Federal Expenditures	Amount to Subrecipients
United States Department of Labor				
Passed through the State of Florida, Department of Commerce:				
Employment Service Cluster:				
Employment Service/Wagner-Peyser Funded Activities	17.207	WPA24	\$ 28,814	\$ 6,164
Employment Service/Wagner-Peyser Funded Activities	17.207	WPB24	28,168	-
Employment Service/Wagner-Peyser Funded Activities	17.207	WPA25	452,056	-
Employment Service/Wagner-Peyser Funded Activities	17.207	WPB25	151,429	-
Local Veterans' Employment Representatives (LVER)	17.801	LVR24	16,823	-
Local Veterans' Employment Representatives (LVER)	17.801	LVR25	22,400	-
Disable Veterans' Outreach Program (DVOP)	17.801	DVP24	22,167	-
Disable Veterans' Outreach Program (DVOP)	17.801	DVP25	24,443	-
Total Employment Service Cluster			746,300	6,164
Unemployment Insurance	17.225	UCR23	189,819	-
Unemployment Insurance	17.225	UCR24	94,852	-
Total Unemployment Insurance			284,671	-
National Emergency Grants - Fostering Opioid Recovery	17.277	WNO20	43,286	-
National Emergency Grants - Hurricane Ian	17.277	WNI23	609,620	-
National Emergency Grants - Hurricane Helene	17.277	WNH24	255,537	-
National Emergency Grants - Fostering Opioid Recovery	17.277	WNO23	58,931	-
Total National Emergency Grants			967,374	-
Workforce Innovation and Opportunity Act Cluster:				
WIOA Adult Program	17.258	WIA24	61,654	1,554
WIOA Adult Program	17.258	WIA25	827,620	4,240
WIOA Adult Program - State Level	17.258	WRS23	118,475	-
WIOA Adult Program - State Level	17.258	WIR25	27,942	-
WIOA Adult Program - State Level	17.258	WIS24	56,484	-
WIOA Youth Activities	17.259	WIY24	371,329	763
WIOA Youth Activities	17.259	WIY25	399,001	1,105
WIOA Youth Activities - State Level	17.259	WRS23	114,772	-
WIOA Youth Activities - State Level	17.259	WIR25	27,069	-
WIOA Youth Activities - State Level	17.259	WIS24	54,719	-
WIOA Dislocated Worker Formulas Grants	17.278	WID24	184,476	232
WIOA Dislocated Worker Formulas Grants	17.278	WID25	586,631	1,723
WIOA Dislocated Worker Formulas Grants - State Level	17.278	WRS23	136,986	-
WIOA Dislocated Worker Formulas Grants - State Level	17.278	WIR25	32,308	-
WIOA Dislocated Worker Formulas Grants - State Level	17.278	WIS24	65,310	-
Total Workforce Innovation and Opportunity Act Cluster			3,064,776	9,617
Total United States Department of Labor			5,063,121	15,781
U.S. Department of Agriculture				
Passed through the State of Florida, Department of Commerce:				
Supplemental Nutrition Assistance Program Cluster:				
Supplemental Nutrition Assistance Program	10.561	FSH24	13,971	1,347
Supplemental Nutrition Assistance Program	10.561	FSH25	50,370	5,060
Total Supplemental Nutrition Assistance Program Cluster			64,341	6,407
Total U.S. Department of Agriculture			64,341	6,407
U.S. Department of Health and Human Services				
Passed through the State of Florida, Department of Commerce:				
Temporary Assistance for Needy Families	93.558	WTS24	499,306	12,812
Temporary Assistance for Needy Families	93.558	WTS25	918,907	-
Total Temporary Assistance for Needy Families			1,418,213	12,812
Total U.S. Department of Health and Human Services			1,418,213	12,812
TOTAL EXPENDITURES OF FEDERAL AWARDS			\$ 6,545,675	\$ 35,000

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, 2025**

(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 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, 2025, 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 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 or significant deficiencies may exist that were not 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 Organization'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 Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

James Moore & Co., P.L.

Daytona Beach, Florida
January 1, 2030

DRAFT

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 identified as subject to audit 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, 2025. 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 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, 2025.

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.

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2025
(CONTINUED)**

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 the 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

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

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2025
(CONTINUED)**

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

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. Given these limitations, during our audit we did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses, as defined above. However, material weaknesses or significant deficiencies in internal control over compliance may exist that were not identified.

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.

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.

Tallahassee, Florida
January 1, 2030

James Moore & Co., P.L.

DRAFT

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2025**

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>
17.258, 17.259, 17.278	WIOA Cluster

Dollar threshold used to distinguish between type A and type B Federal programs: \$750,000

Auditee qualified as low-risk auditee? yes No

II. Financial Statement Findings: None.

III. Federal Awards Findings and Questioned Costs:

**SUNCOAST WORKFORCE BOARD, INC.
D/B/A CAREERSOURCE SUNCOAST
SCHEDULE OF FINDINGS AND QUESTIONED COSTS
FOR THE YEAR ENDED JUNE 30, 2025
(CONTINUED)**

IV. State of Florida, Department of Commerce (DOC) Reporting Requirements:

1.	Timely reconciliation between the general ledger accounting system and the Subrecipient Enterprise Resource Application (SERA) maintained by the DOC.	Yes
2.	Annual reconciliation to year-end financial records must include the following:	
a.	Each federal award passed through DOC balanced by the individual DOC NFA ID# since each NFA is required to be a self-balancing set of accounts.	Yes
b.	Net assets of each federal award equaled zero.	Yes
c.	Federal awards did not have negative cash balances without sufficient explanation.	Yes
d.	All cost pools were allocated to their final cost objectives.	Yes
3.	Application of indirect cost rate agreements negotiated with the federal cognizant agency or DOC had no areas of noncompliance noted.	Yes
4.	Federal cash management processes complied with DOC requirements.	Yes

V. Federal Award Summary Schedule of Prior Year Findings: See schedule of prior audit findings on page 24.



David Kraft
Chair

Lisa Eding
Vice Chair

Jim Bos
Treasurer

Joshua Matlock
President & CEO

Schedule of Prior Year Finding:

2024-001 – Information on the Federal Program: ALN 93.558 – Temporary Assistance for Needy Families – WTS23/24 – Compliance Requirement: Activities Allowed

Corrective action taken – CSS reviewed our check issuance procedure to identify discrepancies and areas for improvement. A revised check issuance procedure was approved by the Board in May, 2025 and provided to FL Commerce that same month. The changes have been implemented and being consistently followed. No repeat comment in current year.

DRAFT



ACTION ITEM

Approval of Strategic Plan 2026- 2028

Joshua Matlock

CAREERSOURCE SUNCOAST
Strategic Plan Modifications
Board of Directors Summary Report
January 29, 2026

Background Information:

On October 21, 2025, Carter Consulting Group held a strategic planning session with the CSS leadership team and Board of Directors. This session was conducted to assist CSS in moving to a two-year strategic planning cycle vs a five-year cycle in an effort to adjust to the rapidly changing workforce landscape more fluidly. Carter Consulting developed and presented a summary report of the planning sessions to CSS, providing recommendations for strategic plan updates to reflect the current vision of the Board of Directors.

2-Year Goals

- Enhance offerings to focus on increasing access by employers

Key Result: Enhanced customized employer-focused solutions; apprenticeship development.

Key Result: Access programs to help job seekers and employees address financial/benefit gaps.

- Diversify unrestricted funds to grow best practice programs for employers

Key Result: Increased local funding opportunities and business funding models

- Strengthen board engagement by developing opportunities for members to increase awareness of CSS among employers.

Key Result: Build a menu of board engagement opportunities and match board members according to highest and best use as advocates .

Requested Motion: To approve the 2026-2028 CareerSource Suncoast Strategic Plan framework.

Respectfully submitted,

Joshua Matlock
President, CEO

MEMORANDUM

Date: November 14, 2025

To: Josh Matlock, President & CEO
David Kraft, Board Chair
CareerSource Suncoast

From: Neal Watkins; Director of Emerging Opportunities
Kerry A. Bartlett, CFRE, MBA; Managing Director

Subject: 2025 Board Retreat – Synopsis & Recommendations

Thank you for inviting Carter to facilitate the 2025 CareerSource Suncoast (CSS) Board Retreat. It was an honor to support CSS's staff and volunteer leadership in important progress toward continued impact and growth across the Suncoast region. This memo provides a synopsis of discussions and high-level recommendations emerging from the Board Retreat held on October 21, 2025.

OVERVIEW & PURPOSE

Building upon the partnership established through prior strategic engagement, Carter facilitated a 2025 Strategic Visioning Retreat to affirm alignment within the 2023-25 CSS Strategic Framework, articulate the two-year direction for 2025–2027, and address external threats that may impact organizational success. The retreat further sought to identify Board-level priorities and clarify how CSS can continue to serve as a regional leader in workforce development while navigating changing economic, demographic, and policy landscapes. (For agenda, see Appendix A)

RETREAT SUMMARY & OBSERVATIONS

The retreat began with the *2024 Apprentice of the Year* video featuring CSS partner PGT and award recipient, Andrew Clark. Participants reflected on the significance of apprenticeships, recognizing them as the clearest expression of CareerSource's mission—employer-informed, opportunity-creating pathways that open doors for both workers and businesses. This discussion reinforced the importance of advancing hands-on learning models and ensuring that the strategic framework

continues to prioritize solutions that strengthen employers, equip workers, and drive long-term economic vitality in the region.

Carter then presented a high-level review of insights drawn from the advance planning web survey, which provided an important snapshot of Board members' observations and priorities:

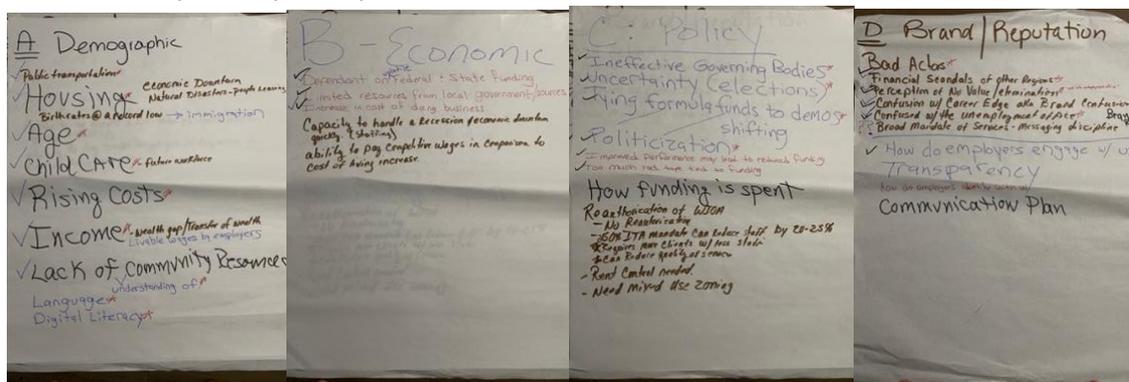
- There was overall consensus around the ongoing relevance of the three-year goals.
- A couple of responses indicated a lack of understanding around the need to increase unrestricted funds for investment in programs.
- The top threats identified all related directly to funding.
- Some Board members were unclear about how—and in some cases why—CSS leadership identified an affordable housing initiative aligned with the strategic framework.

Josh Matlock emphasized that affordable workforce housing has become a critical factor in recruitment and retention, which are employer-focused priorities for CSS. The Board affirmed CSS's role in this area and noted a communications gap among Board members who had not been part of earlier conversations, underscoring the need for clearer, ongoing messaging around this work.

The leadership team then reviewed CSS's 2023–2025 KPIs and shared progress aligned with the organization's three goals (see Appendix B).

1. External Threats

In small groups, participants examined a range of external factors that pose potential threats to CSS's mission delivery. These included demographic shifts in the labor market, funding volatility, policy and regulatory uncertainty, and challenges around brand awareness and public perception.



Although participants acknowledged that none of the threats were surprising—and largely affirmed the themes revealed in the web survey—they identified meaningful opportunities to strengthen mitigation strategies through clearer communication and more intentional advocacy. The Board also affirmed the need for continued agility reflected in programs like apprenticeships, along with a parallel exploration of models less dependent on government funding. As was noted by Josh Matlock, “these threats are our opportunities to be the solution.”

2. Assessing the Current Strategic Framework

Acknowledging the significance of external threats, participants evaluated the 2023-28 Strategic Framework in the context of the organization’s 2023-2025 strategic direction. Recommendations for updating the strategic framework for the next two years included:

- Modify “Develop a plan to invest unrestricted funds...” to “Diversify unrestricted funding...” by
 - o increasing local funding opportunities
 - o increasing the types of business/funding models of partnerships
 - o strategically investing for a higher ROI
- Remove (current) examples within “...customized employer-focused solutions...” to clearly express the intention of “employer focused” and be less limited by previous examples

3. Best-Case Scenarios

During a Best-Case Scenario discussion, Board members envisioned what success would look like for CareerSource Suncoast over the next two years:

- CSS will be recognized as a regional leader in workforce innovation
- CSS will strengthen and expand proven practices – apprenticeships and training platforms -- that unite employers, educators, and job seekers leading to a stronger more diversified economy and therefore the overall community
- Building a ready and resilient workforce that meets the needs of local industries will continue to be a focus.
- CSS will be known for service delivery and thought leadership, setting a standard for how regional workforce systems can respond creatively to demographic, technological, and economic change

To move closer to the best-case scenario, Board members identified the most urgent needs for their collective time and talent, which included a shared commitment to proactive and visible advocacy and storytelling—using each member’s regional

influence to elevate awareness of CSS's programs and their impact on employers. Participants named potential regional impacts of a fully engaged Board advocacy effort.:

- Education
- Legitimacy
- Political action committees writing checks
- Ambassadors in the community
- Expressing a need/case/how to help
- Business community providing stories
- Sharing, uplifting, highlighting the impact(s) of CSS

4. Sharing the CSS Story

Carter facilitated individual reflection and small group exercises to emphasize talking points around the impact that CSS makes, what CSS needs, and how to describe CSS in the future.

As Board members rotated through individual conversations with these three prompts, they were asked to describe CSS in a single word, generating a set of themes that captured how the organization could be perceived at its best:

- Innovation
- Results
- Solutions
- Impact

Potential partners and community stakeholders who could benefit from conversations with CSS Board members include:

- Employers
- Job seekers
- Chambers
- Elected Officials
- Foundations
- Other Nonprofits

RECOMMENDATIONS

Based on observations and feedback received at the end of the retreat (see Appendix C), Carter recommends CareerSource Suncoast:

1. Share this report at the next Board meeting.

As many Board members did not attend the retreat, it will be critical to review the outcomes and agreements at the next Board meeting. A peer-led generative discussion will ensure continuity of thought, reinforce shared ownership, and extend the clarity gained across the full Board.

2. Develop annual operational plans and a dashboard around KPIs intentionally designed to monitor advancement of the Strategic Framework's two-year goals.

- a) Once the Board approves the 2025-27 Strategic Framework, the leadership team should develop annual operating plans aligned with the goals and priorities.
- b) Seek input from the Board on KPIs that will guide and measure progress toward goals and priorities.
- c) Establish a quarterly schedule to report on the progress to date and engage the Board in a discussion around any modifications that need to be considered based on changes in the local, state or federal sectors.

3. Incorporate Strategic Framework language into staff reporting to Board

Building on the success of the program dashboard presented at the retreat, the leadership team should schedule intermittent program snapshots, brief data stories, or short client/employer videos intermittently throughout the year — each tied to a five-year objective or two-year goal. Board members will want to capture these stories as part of their advocacy toolbox.

4. Make intentional space in Board meetings to discuss emerging business models.

Developing alternative models for partnership ownership and investment was identified as a key strategy for increasing unrestricted funds. Creating regular opportunities for the Board to discuss these evolving service models, explore new collaborations, and offer input on pilot initiatives will strengthen engagement and ensure alignment around the organization's evolving impact narrative as CSS seeks to reduce its dependence on government funding.

5. Strengthen Board Advocacy Through Structured Tools and Regular Engagement During Board Meetings

The Board must take a more active role in holding themselves accountable for their role in raising the visibility of CSS in the community, especially with key stakeholders and partners. This starts with the implementation of a process to identify ways each Board member is going to deliver on this commitment and report on outcomes.

In partnership with professional leadership, the Executive Committee should create a menu of six to eight advocacy opportunities from which Board members can select one or two they commit to doing for the year. These opportunities may include, among others, outreach, partnership cultivation, event presence, employer introductions, storytelling at speaking opportunities, sharing CSS social media posts, etc.

At each Board meeting, the Board chair would provide space for Board members to share an update or success story. To start, members of the Executive Committee will need to be prepared to model the behavior to encourage others to follow.

CONCLUSION

Carter extends its sincere appreciation to the Board and leadership of CareerSource Suncoast for their presence, candor, and commitment throughout this process. Your shared vision and willingness to engage deeply in strategic dialogue reflect the kind of leadership that drives both organizational excellence and regional transformation. The progress reflected in this retreat—and the clarity of purpose that emerged—affirm the vital role each of you plays in shaping a stronger, more connected, and more resilient Suncoast community.

APPENDIX A – FRAMING MEMO & AGENDA



October 17, 2025

TO: Board of Directors
FROM: David Kraft, Chairman
Josh Matlock, President & CEO
RE: Board Retreat – October 21, 2025

We look forward to your participation in CareerSource Suncoast's Strategic Visioning Board Retreat on Tuesday, October 21. We'll gather **beginning at 8:30 a.m. for coffee**, with a prompt **start at 9:00 a.m.** Please arrive ready to contribute your perspective, engage in thoughtful dialogue, and help shape our shared direction.

To prepare for this thoughtful conversation, please review the enclosed materials:

- The current CareerSource Suncoast Strategic Framework, highlighting our mission, vision, and current priorities.
- The CareerSource Florida Network Impact Report, offering statewide context and insight into workforce trends.

Our facilitators, Neal Watkins and Kerry Bartlett from Carter, will guide our discussion as we:

- Identify the most pressing external threats to our continued impact;
- Affirm the goals and objectives that mitigate these threats and capitalize on opportunities in our region;
- Strengthen our ability to share the CareerSource Suncoast story as effective advocates and ambassadors.

Please keep in mind:

- Our goal is conversation and consensus—not lecture from the podium or formal approval.
- Each voice is valued; listening generously and engaging fully will enrich our work together.
- The facilitators' role is to ensure all perspectives are heard and to help translate our insights into actionable priorities.

We're grateful for your leadership and commitment.



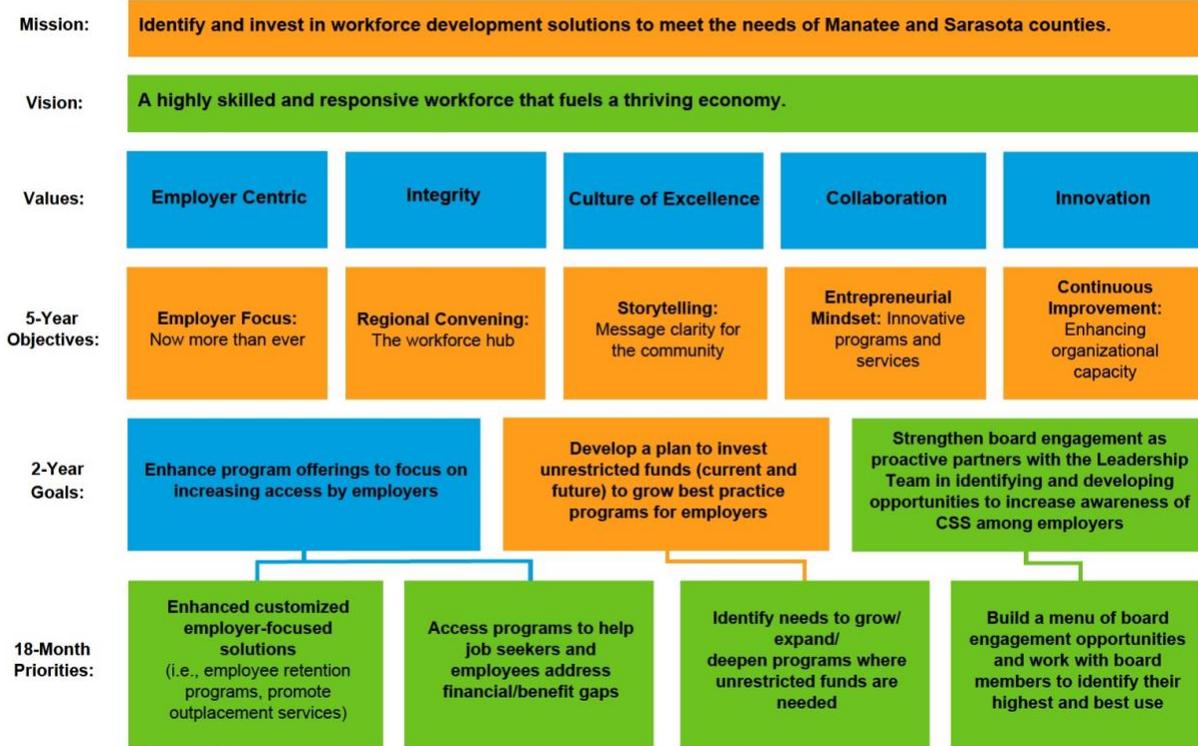
Board Retreat Agenda
Tuesday, October 21, 2025
9:00 a.m. – 1:00 p.m.
3660 N. Washington Blvd.

1. Welcome and Opening Remarks	David Kraft Board Chairman Josh Matlock President and CEO
2. Reviewing the Pre-Retreat Board Survey	Carter
3. 2023-2025 Program KPIs	CSS Leadership
4. Naming the (External) Threats	Board Discussion
5. Best-Case/Worst-Case	Small Group Breakout
6. Sharing the CSS Story	Carter
7. Action Steps, Gots/Wants/Needs	CSS Board
8. Next Steps & Closing Remarks	David Kraft & Josh Matlock

APPENDIX B – DRAFT STRATEGIC FRAMEWORK



**WORKING DRAFT
Strategic
Framework
PY2025-2026**



APPENDIX C – FEEDBACK FORMS & GOT, WANT, ???



2025 Board Strategic Visioning Retreat - October 21, 2025 - Feedback Form

Thank you for your outstanding participation in today's Board Retreat! Please take 5 minutes to complete this anonymous survey.

The purpose of the retreat was well-defined and the intended results were clear.

Strongly Agree - **12** Agree - **3**

I am excited about building on the ideas expressed by board members during the retreat.

Strongly Agree - **12** Agree - **3**

I have a clear understanding of what CareerSource Suncoast will prioritize over the next two years to mitigate/reduce impending threats.

Strongly Agree - **10** Agree - **5**

I recognize that my advocacy—through storytelling and engagement—plays a vital role in advancing partnerships and extending the reach and influence of CareerSource Suncoast.

Strongly Agree - **11** Agree - **4**

The facilitators ensured everyone had a voice and the opportunity to participate in the discussions.

Strongly Agree - **14** Agree - **1**

**They even had me get out of my comfort zone by getting up and talking to others.*

I suggest the Board have discussion on the following topic(s) at a future meeting.

- Engagement
- Advocacy – story telling –
- Storytelling – Investment opportunities – diversified funding
- Alternate Funding Sources
- Elevator Speech – Stories/Dashboard to share
- Communication Plan
- Elevator Speech – Creating a Strong Brand
- Story telling & Sharing our Mission
- Advocacy
- How Board will execute on storytelling & advocacy

Please share other suggestions/feedback below (or the back of this survey). Thank you!

- Great work! 😊

Got:

- Mission/Vision and what I can contribute **now**
- A clearer understanding of the urgency of current risk to funding
- Re-energized
- I understand the link of Affordable Housing to the mission of CSS. (I know it is an issue – did not understand the link)
- More information + an opportunity to meet staff & board members
- Passion of everyone in attendance
- Great discussion and strong consensus
- It was great to get a legislative update in the current state of affairs
- A fresh perspective and better understanding of our direction and needs.
- Great check-in on vision & goals & opportunities

Want:

- More Board engagement
- More participation from other Board members
- Dashboard / Stories to Share
- I would still like a list of apprenticeships
- Controlling the passion. Elevator Speech
- More of this
- I was very happy to hear the focus on apprenticeship, I want to see that focus followed up with a commitment to maintaining quality of the programs.
- More targeted perspective “leave” behinds on the program! This high impact less narrative/words

- A 1-page overview of local impact

????

- What can we do as Board members to support the current advocacy effort?
- How to engage everyone
- You write those cards manually?
- I'd like to follow-up on partnerships with the JATCs and CSS.
- How many referrals are made out to community partners



Strategic Framework PY2025-2027

Mission: Identify and invest in workforce development solutions to meet the needs of Manatee and Sarasota counties.

Vision: A highly skilled and responsive workforce that fuels a thriving economy.

Values: Employer Centric, Integrity, Culture of Excellence, Collaboration, Innovation

5-Year Objectives: Employer Focus: Now more than ever, Regional Convening: The workforce hub, Storytelling: Message clarity for the community, Entrepreneurial Mindset: Innovative programs and services, Continuous Improvement: Enhancing organizational capacity

2-Year Goals: Enhance program offerings to focus on increasing access by employers, Diversify unrestricted funds to grow best practice programs for employers, Strengthen board engagement as proactive partners with the Leadership Team in identifying and developing opportunities to increase awareness of CSS among employers

18-Month Priorities: Enhanced customized employer-focused solutions, Access programs to help job seekers and employees address financial/benefit gaps, Increase local funding opportunities and business/funding models, Build a menu of board engagement opportunities and work with board members to identify their highest and best use as advocates



CEO Report



OTHER BOARD BUSINESS



One-Stop Operator Report

Terri Clark, TClark Workforce Solutions, LLC



Q2 One-Stop Operator Report, PY25_26 (Semi-Annual Report)

TClark Workforce Solutions, LLC. (TClark), continues to serve as the One-Stop Operator (OSO) for CareerSource Suncoast (CSS). This report is the first required quarterly report and addresses the scope of work for the program year beginning July 2025 through June 2026.

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:

In the first quarter, the One-Stop Operator (TClark) conducted meetings with representatives from CareerSource Suncoast (CSS) throughout the quarter.

One-Stop Operator Partner Meeting:

TClark organized and facilitated the quarterly One Stop Operator Partners meeting. The Q2 OSO partner meeting was held on Wednesday, November 19th at 2:00pm. Twelve (12) OSO participants attended the meeting via Team's. Agenda items are listed below:

- Welcome, Terri Clark
- eRising Entrepreneurship Event
- Veterans Financial Freedom Workshop Series
- Apprenticeship Discussion
 - Wrap-Around Services from Partners
 - Updates on apprenticeship programs and initiatives in the region.
- CareerSource Suncoast Updates, James Disbro and Terri Clark
- Partner Updates
 - StepUP Suncoast: Update on Early Childhood Programs and Tax Assistance
 - Staffing Updates and Job Openings
- Q2 Infrastructure Funding Agreements, Terri Clark
- Meeting Dates and Time, Terri Clark

Education and Industry Consortium Quarterly Meeting:

TClark organized and facilitated the quarterly Education and Industry Consortium meeting. The Q1 EIC meeting was held on Wednesday, November 12th at 1:00pm. Nine (9) participants attended the meeting via Team's. Agenda items are listed below:

Introduction: Terri Clark, TClark Workforce Solutions

Career Source Suncoast Updates: James Disbro and Christina Witt

Discussion Items:

- Labor Market Data, Florida Commerce
 - Discussion on 'Un-Employed' vs Under-Employed'

- Job Outlook/Economic Forecast for Sector Specific Industries
 - Healthcare
 - Manufacturing
 - Finance
 - Construction
 - IT
 - Transportation and Logistics

- Apprenticeship Discussion
 - Roles of LWDB, Industry, Educational Partners
 - Current RAP programs within Suncoast WF district
 - Updates on potential new programs

- Educational Updates
 - Fall 2025 Industry Advisory Committee Events at MTC
 - Outlook on Spring 2026 programs

- Employer Updates
 - The transportation sector is experiencing a surge in retirements, with the ATA reporting that the average age of a driver is 48 years.
 - Local manufacturers are showing reluctance to expand their workforce or training initiatives, opting to 'wait and see' what the next six to nine months may bring.
 - Finance industry sector reporting increased demand for AI and advanced technology skills within workforce.

- Recommendations:
 - Expanding technical college programs to reach more rural areas.
 - Developing additional registered apprenticeship programs before employers recognize the demand.
 - Implementing Learning Management Systems (LMS) to offer on-the-job training and RAP programs in an online, competency-based format.
 - Strategies for improving connections between employers and workforce services.

Public Comments and Closing Remarks: Terri Clark

Adjournment: Terri Clark

TClark composed and submitted the Q2 EIC report, which can be found on the CareerSource Suncoast website.

Infrastructure Funding Agreements (IFA):

TClark reviewed the Q1 Infrastructure Funding Agreements (IFA) Reports submitted by One Stop Mandated Partners on November 15, 2025. TClark met with CSS leadership on reporting updates and MOU compliance.

TClark facilitated the Q2 Infrastructure Funding Agreements (IFA) Report templates with the One Stop Mandated Partners via email with a submission deadline of February 15, 2026.

TClark continues to provide individual support to the mandated partners regarding completing the IFA reports. The IFA agreements are in place with ten (10) mandated partners.

Customer Service Satisfaction:

TClark reviewed Q2 customer satisfaction surveys via SurveyMonkey online. One employer provided feedback on their survey: *"We were able to speak to multiple candidates for our organization. We also participated in job fairs provided by Career Source Suncoast."* Employers indicated 100% likely to use CareerSource for their employment needs.

Customer responses rated 88% likely or highly likely to refer others to CareerSource Suncoast or use CareerSource Suncoast services again. Customers were asked to share specifics of their interaction with CareerSource Suncoast. Examples include: *"Career Source employees are very helpful and willing to assist you in your search for a job. Also, when employed I like the fact that I can get a weekly pay cheque. Would like to see a branch in Bradenton because some people may not have the transportation to travel or a vehicle. Thank you for your community service."*

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).



Terri Clark

1/12/2026



FINANCE
AND
PERFORMANCE
COMMITTEE
REPORT

CAREERSOURCE SUNCOAST
Finance & Performance Committee
Board of Directors Summary
January 29, 2025

The Finance & Performance Committee met on January 8, 2025. The meeting was combined with the Executive Committee Meeting.

Review of WIOA Performance Indicators:

Anthony Gagliano reviewed the CSS WIOA Performance Indicators for the first quarter of PY 2025-2026 ending 09/30/2025.

LWDB 18

Measures	PY2024-2025 4th Quarter Performance	PY2024-2025 % of Performance Goal Met For Q4	PY2024-2025 Performance Goals	PY2025-2026 1st Quarter Performance	PY2025-2026 % of Performance Goal Met For Q1	PY2025-2026 Performance Goals
Adults:						
Employed 2nd Qtr After Exit	89.7	104.30	86	88.6	103.02	86
Median Wage 2nd Quarter After Exit	\$11,971	130.94	\$9,142	\$11,971	130.95	\$9,142
Employed 4th Qtr After Exit	85.2	96.38	88.4	82.9	93.78	88.4
Credential Attainment Rate	76	98.70	77	69.5	90.26	77
Measurable Skill Gains	92	177.26	51.9	79.5	153.18	51.9
Dislocated Workers:						
Employed 2nd Qtr After Exit	100	120.48	83	85.7	103.25	83
Median Wage 2nd Quarter After Exit	\$6,701	63.21	\$10,600	\$12,482	115.57	\$10,800
Employed 4th Qtr After Exit	100	125.00	80	100	125.00	80
Credential Attainment Rate	50	100.00	50	50	83.33	60
Measurable Skill Gains	81.8	105.41	77.6	90.9	117.14	77.6
Youth:						
Employed 2nd Qtr After Exit	80	97.56	82	81	98.78	82
Median Wage 2nd Quarter After Exit	\$10,266	223.66	\$4,590	\$11,045	240.63	\$4,590
Employed 4th Qtr After Exit	83.3	104.13	80	94.7	118.38	80
Credential Attainment Rate	30	40.00	75	44.4	59.20	75
Measurable Skill Gains	91.2	121.60	75	77.8	103.73	75
Wagner Peyser:						
Employed 2nd Qtr After Exit	68.9	101.77	67.7	67.5	99.70	67.7
Median Wage 2nd Quarter After Exit	\$8,764	131.76	\$6,651	\$8,771	131.87	\$6,651
Employed 4th Qtr After Exit	68.3	107.22	63.7	66.1	103.77	63.7

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

Respectfully Submitted,

Jim Bos
 CSS Treasurer



STAFF REPORTS

- Robin Dawson, VP/CFAO
- Anthony Gagliano, VP/COO