



**Combined Executive Committee
and**

Board of Directors Meeting

Thursday, March 12, 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](#)

Call 1-786-600-3104

Phone Conference ID: 229 303 654#

AGENDA

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

Board Member Updates- David Kraft

- Jacki Dezelski- Resignation effective February 25, 2026

Executive Committee Action Item – David Kraft

- Approval of January 8, 2026 Executive Committee Meeting Minutes

Board of Directors Action Items – David Kraft

- Approval of Consent Agenda
 - Approval of January 29, 2026 Board Meeting Minutes – David Kraft
 - Approval of Revised Policy #2-21 Purchasing and Procurement
- Approval of Audit & Tax Services Contract Negotiations – Jim Bos, Committee Chair
- Approval of Transfer of Funds from Dislocated Worker to Adult – Robin Dawson
- Approval of Budget Modification #2 for PY 2025-2026 - Robin Dawson.
- Approval of Revised CareerSource Suncoast Bylaws – Lisa Eding, Committee Chair

Other Board Business

- Mandatory Annual Refresher Training for Board Members – CSS Leadership Team
 - Sunshine Law Training & Ethics – George Levesque, GrayRobinson
- Finance & Performance Committee Reports – Jim Bos
 - Finance Reports
 - Performance Reports

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

Revised 3/11/2026



CEO Report – Joshua Matlock

Staff Reports

- Robin Dawson
- Anthony Gagliano

Public Comments/Closing Remarks – David Kraft, Chair

Next Scheduled Meetings – David Kraft

- Executive Committee Meeting - May 13, 2026
 - Location: Virtual Teams and Call-in Meeting Only
- Board of Directors Meeting is May 28, 2026
 - Location: 3660 N. Washington Blvd, Sarasota, FL

Adjournment - David Kraft, Chair



EXECUTIVE COMMITTEE ACTION ITEM

**CareerSource Suncoast
Combined Executive Committee
And
Finance & Performance Committee
Meeting Minutes**
Teams Virtual Meeting
Thursday, January 8, 2026
8:00 a.m.

Absent Present	<u>Executive Committee Members</u>
P	David Kraft, Vision Consulting Group
P	Shaun Polasky, Helios Technologies
P	Eric Troyer, Kerkering, Barberio & Company
P	Lisa Eding, Teakdecking Systems
P	Jim Bos, MJB Group, LLC.
	<u>Finance & Performance Committee Members</u>
P	Jim Bos, MJB Group, LLC.
P	Lorri Kidder, Carr, Riggs & Ingram CPAs, and Advisors
A	Ericka Randall, Vocational Rehabilitation
P	Doras Davilla,
	Staff Present: Joshua Matlock, Anthony Gagliano, Kathy Bouchard, Robin Dawson, Christina Witt, Michelle Snyder, Karima Habyt, James Disbro, Lori Sardinas

I. Call to Order

David Kraft, Chair, called the meeting to order at 8:00 a.m. Attendance was recorded, and a quorum was established.

II. Action Items

Approval of November 13, 2025, Executive Committee Meeting Minutes

David Kraft requested a motion to approve the November 13, 2025, Executive Committee meeting minutes with the noted change to remove the word “Discretionary” from the CEO bonus and correct a name spelling.

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

The motion passed unanimously.

Approval of November 13, 2025, Finance & Performance Committee Meeting Minutes

Jim Bos requested a motion to approve the November 13, 2025, Finance & Performance Committee meeting minutes.

Motion: Lorri Kidder **Second:** Doras Davila

The motion passed unanimously.

Acceptance of the Financial Audit Report for Program Year Ending June 30, 2025

James Halleran, James Moore & Co., presented the PY ending June 30, 2025, financial audit report.

David Kraft requested a motion to accept the Financial Audit Report for Program Year Ending June 30, 2025

Motion: Lori Kidder **Second:** Doras Davila

The motion passed unanimously.

III. Finance and Performance Committee Meeting

Anthony Gagliano reviewed the CSS WIOA Performance Indicators for Quarter one of PY 2025-2026, ending 09/30/2025. A copy of the performance results was provided in the agenda packet.

IV. CEO Report – Joshua Matlock

Federal-Level: Henry Mack has been appointed Assistant Secretary of Labor for the Employment & Training Administration. His Florida background and strong relationships with local leaders are expected to benefit workforce initiatives. WIOA reauthorization is not expected soon, which workforce boards view positively because it gives them more time to address concerns—especially the challenging 50% ITA expenditure mandate. Workforce boards are actively collaborating with national associations and federal partners to improve the proposed WIOA language.

State-Level: Leadership will travel to Tallahassee for the CareerSource Florida Board of Directors and FWDA meeting. Boards will discuss state priorities and share key concerns and focus areas for the coming year. To include an ITA modernization proposal.

Apprenticeship Expansion: Florida’s apprenticeship system is currently constrained because only nine (9) Apprenticeship Training Representatives (ATRs) are responsible for statewide coverage, resulting in significant delays of 6–9 months in getting new apprenticeship programs approved. To address these bottlenecks, the proposal recommends assigning one ATR to each workforce board, converting existing ATRs into program approvers and expanding overall system capacity to reduce approval delays. The proposed funding source is the Pathways to Career Opportunities Grant (PCOG).

Strategic Planning: An overview of the strategic planning retreat held in October 2025 was provided.

V. Staff Reports

Kathy Bouchard

Programmatic Monitoring: Michelle Snyder and the team are currently preparing for the upcoming FloridaCommerce in February. CSS has received access to an AI automatic program monitoring tool. The tool provides real-time monitoring on programs.

Staff Retreat: CSS held their annual December staff retreat. The retreat focused on the work of the three work group committees: Technology and Efficiencies, Advancement and Succession Planning, and Culture of Recognition. The annual poll was conducted showing overall satisfaction levels remained consistent with the previous December, though slightly lower than the exceptionally high ratings from the August retreat.

Robin Dawson

Financial Monitoring: The accounting team is currently preparing for the FloridaCommerce financial monitoring in February.

990 Preparation: Currently working with James Moore and preparing the Form 990. The form will be sent to the board for review.

Staffing Updates: Jessica Grise will be leaving CSS due to relocation out of the state. Lori Sardinas has been promoted to the Accounting Manager. Whitney Voutour was an internal promotion as an Accounting Specialist.

Anthony Gagliano

CEO Program: A recent CEO program graduate was highlighted as a success story with a video. Registrations for the next cohort are strong, with around 130 participants, including eighteen from the Newtown CRA area, and hopes of reaching two hundred registrants. The program recently celebrated its largest graduating class in October 2025.

Business Services: The team is planning a job fair on January 29 at the 13th Ave. Dream Center in Bradenton. Employer and jobseeker registration remains open. Planning underway for additional events in South County and North Port in the spring.

Artificial Intelligence Integration: Thanks to Chet Filanowski, CSS now has a formal AI policy. Use of Microsoft Copilot expanded from 5 to 25 licenses. AI supports coding, automation, and client-facing communications. CSS has a new partnership with Go Gig to automate intake and assessment.

Summer Youth Program: Applications expected to open soon. Manatee County approved \$150,000 in funding to support forty-five youth. CSS continues a partnership with the Florida Lottery providing supplemental funding.

Hurricane Recovery: Collaboration with United Way South Sarasota County supported recovery activities and staffing. Recovery workers aided more than one hundred homes damaged by hurricanes. Sixty-three individuals placed into temporary employment; fourteen completed training. Programs collectively generated over \$1.5M in wages for affected workers.

VI. Public Comment/Closing Remarks – David Kraft

VII. Next Scheduled Meeting – David Kraft

Next Executive Committee meeting is scheduled for March 12, 2026, combined with the Board of Directors meeting.

Location: CareerSource Suncoast, 3660 N. Washington Blvd. Sarasota, Fl. 34234

VIII. Adjournment

David Kraft adjourned the meeting at 8:47 a.m.

Respectfully submitted,

Joshua Matlock

[Joshua Matlock \(Feb 20, 2026 10:30:20 EST\)](#)

Joshua Matlock
President/CEO



BOARD OF DIRECTORS ACTION ITEMS



ACTION ITEM - Consent Agenda

- Meeting Minutes
- Policy #02-21 Revision

CAREERSOURCE SUNCOAST
Board Meeting Minutes
Virtual TEAMS Meeting and In-person
3660 N. Washington Blvd., Sarasota, FL 34234
Thursday, January 29, 2026

Call to Order

David Kraft, Chair, called the meeting to order at 8:01 a.m. Roll call was performed, and a quorum was established.

Chief Local Elected Officials – David Kraft

The Commissioners appointed to the Board for 2026 were announced.

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

Audit and Tax Services Proposal Review Committee Appointments- David Kraft

- Jim Bos (Chair)
- Lorri Kidder
- Eric Troyer

Officer Nominating Committee Appointments - David Kraft

- Ashley Brown (Chair)
- Allison Imre
- Eric Troyer

Bylaws Review Committee Appointments - David Kraft

- Lisa Eding (Chair)
- Sarah Tar

Action Items - David Kraft, Chair

- **Approval of Consent Agenda**

David Kraft requested a motion to approve the Consent Agenda items.

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

Motion: Jim Bos

Second: Paul Gansamar

Motion passed unanimously

- **Approval of Financial Audit for Program Year Ending June 30, 2025**

James Halloran, James Moore & Co. presented the financial audit report to the Board of Directors. A copy of the report was provided in the meeting materials.

David Kraft requested a motion for the Board of Directors to accept the Financial Audit report ending June 30, 2025.

Motion: Allison Imre

Second: Will Cromie

Motion passed unanimously

- **Approval of Strategic Plan 2026- 2028 – Joshua Matlock**

Joshua Matlock reviewed the strategic plan update and requested a motion to approve the Strategic Plan PY26-28.

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

Motion passed unanimously

CEO Report: Joshua Matlock

Federal Level Update: Discussions are underway regarding workforce system reauthorization. Leaders from the association, including Marty Coley and the speaker, have been engaging with the new Assistant Secretary of Labor for the Employment & Training Administration.

State Level Update: During Workforce Day at the Capitol Representatives from the Department of Corrections, Space Florida, FloridaCommerce, and others discussed barriers and opportunities for growing apprenticeship programs. Momentum is increasing statewide, with strong interest from legislators and agencies. Overall, collaboration and progress continue at both state and federal levels.

Apprenticeship Expansion: Florida’s apprenticeship system is currently constrained because only nine (9) Apprenticeship Training Representatives (ATRs) are responsible for statewide coverage, resulting in significant delays of 6–9 months in getting new apprenticeship programs approved. To address these bottlenecks, the proposal recommends assigning one ATR to each workforce board, converting existing ATRs into program approvers and expanding overall system capacity to reduce approval delays. The proposed funding source is the Pathways to Career Opportunities Grant (PCOG).

Other Board Business:

- **One-Stop Operator and Education & Industry Consortium Report**

Terri Clark, TClark Workforce Solutions, LLC., presented the bi-annual One-Stop Operator Report for the Q2 PY2025-2026. The report was provided in the meeting materials.

- **Finance and Performance Committee Report**

Jim Bos provided an overview of the Finance & Performance Committee meeting from January 8, 2026.

Anthony Gagliano reviewed the CSS WIOA Performance Indicators for the first quarter of program year 2025-26 as of 09/30/2025. A copy of the performance results was provided in the meeting materials.

Staff Reports:

Robin Dawson, CFAO

Financial Monitoring: The accounting team is currently preparing for the FloridaCommerce financial monitoring in February.

990 Preparation: Currently working with James Moore and preparing the Form 990. The form will be sent to the board for review.

Staffing Updates: Jessica Grise will be leaving CSS due to relocation out of the state. Lori Sardinas has been promoted to the Accounting Manager. Whitney Voutour was an internal promotion as an Accounting Specialist

Anthony Gaqliano, COO

CEO Program: A recent CEO program graduate was highlighted as a success story with a video. Registrations for the next cohort are strong, with around one hundred and thirty participants, including eighteen from the Newtown CRA area, and hopes of reaching two hundred registrants. The program recently celebrated its largest graduating class in October.

Veterans: Introduced John Gillespie, the new Disabled Veterans Outreach Program specialist, who recently relocated from North Carolina. Another new hire, Chloe Olson, a military spouse, was acknowledged for her strong work supporting reemployment clients.

Information Technology: Thanks to Chet Filanowski, Senior Director of IT, CSS now has a formal AI policy. Use of Microsoft Copilot expanded from five to twenty-five licenses. AI supports coding, automation, and client-facing communications. CSS has a new partnership with GoGig to automate intake and assessment.

Summer Youth Program: The Summer Youth Employment Program portal will open Monday. This initiative is receiving continued support from the Florida Lottery. Manatee County approved \$150,000 in funding to support forty-five youth.

Opioid Recovery Grant: Finally, the team provided updates on opioid-related initiatives, including an additional \$50,000 grant, a new proposal submitted to Florida Commerce, and continued collaboration with local recovery partners to expand temporary employment opportunities for individuals affected by substance use.

Public Comments: None

Next Meeting:

Next Board of Directors Meeting is March 12, 2026, combined with the Executive Committee Meeting
Location: 3660 N. Washington Blvd, Sarasota, FL

Full Board Meeting Adjournment:

The meeting was adjourned at 8:54 a.m.

Respectfully submitted,


Joshua Matlock (Feb 20, 2026 12:55:24 EST)

Josh Matlock
President, CEO

CAREERSOURCE SUNCOAST - BOARD MEETING ATTENDANCE

Absent Present	Board Member
P	Jim Bos, MBJ Group
P*	Ashley Brown, Women’s Resource Center
P	Nick Choat, Sport Clips Haircuts
P	Will Cromie, Synovus Bank
A	Jackie Dezelski, Manatee Chamber of Commerce
P*	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	Paul Gansemer, Manatee Technical College
P*	Sherod Haliburton, Credit Union1
P*	Patrica Rand, State College of Florida
P*	Allison Imre, Grapevine Communications
P*	Heather Kasten, Sarasota Chamber of Commerce
P*	Lori Kidder, Carr Riggs, & Ingram, LLC.
P	David Kraft, Vision Consulting Group
P*	Anne LeBaron, Take Stock in Children Manatee
P	Shaun Polasky, Helios Technologies
P*	Ericka Randall, Vocational Rehabilitation
P*	Jane Roseboro, Centerstone Florida
P	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
P*	Ken Waters, Sarasota Housing Authority
	Staff Present: Josh Matlock, Robin Dawson, Anthony Gagliano, Christina Witt, Michelle Snyder, John Gillespie, James Disbro, Patrick Smith, Chloe Olson, Karima Habity*, Nicolas Quinn*, Chet Filanowski*
P*	Commissioner Tal Siddique - Manatee County
P*	Commissioner Teresa Mast – Sarasota County

25 Board Members – 22 present, 3 absent

*Virtual

CAREERSOURCE SUNCOAST
Policy Approval
Board of Directors and Executive Committee Summary Report
March 12, 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 changes issued in the [eCFR :: 48 CFR Part 2 Subpart 2.1 -- Definitions \(FAR Part 2 Subpart 2.1\)](#) :

- Update the purchasing and procurement thresholds amounts.
 - Micro-purchases \$15,000 per program year may be awarded without solicitation of competitive quotes.
 - Small Purchases from \$15,000.01 to \$30,000.00 require minimum of two written quotes.
 - Small Purchases from \$30,000.01 to \$150,000 shall require a minimum of three written quotes.
 - 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.

Requested Action:

A motion that the Board of Directors approve the revised Purchasing and Procurement Policy #02-21.

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: 3/12/2026
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 \$15,000 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 \$15,000.01 to \$30,000.00 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 \$30,000.01 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



**ACTION ITEM -
Audit & Tax
Services Contract
Negotiations**

CAREERSOURCE SUNCOAST
Audit & Tax Services RFP Review Committee
Board of Directors and Executive Committee Summary
March 12, 2026

The Audit & Tax Services Request for Proposals (RFP) Review Committee met on Wednesday, March 4, 2026. Members of the committee included:

- Jim Bos, Chair
- Eric Troyer
- Lorri kidder

Background Information:

Public Noticed on January 12, 2026 - The Suncoast Workforce Board, Inc. d/b/a CareerSource Suncoast (CSS) is issuing a Request for Proposals (RFP) to solicit qualified Certified Public Accounting firms to provide audit and tax services. Proposal deadline was February 16, 2026. The successful bidder will contract to audit and prepare the IRS 990 for funding period from July 1, 2025, through June 30, 2026.

Summary of RFP Committee Meeting:

The RFP process was explained, along with the RFP review meeting process and rules. A total of three firms submitted proposals. All three proposals were found responsive based on CSS staff review. A summary of each firm's reference checks was shared for committee review, along with their proposals. Non-Conflict of Interest Statements were signed and on file prior to the rating of the proposals.

The committee reviewed all three proposals. The summary of each firm's ranking and points (alpha order):

<u>Firm</u>	<u>Ranking</u>	<u>Points</u>
James Moore & Co, CPAs	1	288
MKA Certified Public Accountants	2	285
Warren Averett, CPAs	3	225

Committee members independently completed a rating sheet on each proposal. The results of the member ratings were compiled by CareerSource Suncoast staff, with rankings assigned.

Based on the results, James Moore & Company ranked the highest and recommends CSS to engage in contract negotiations with James Moore & Company for audit and tax services for PY2025-2026 and up to four additional one-year periods beyond the completion of the PY2025-2026 audit.

Requested Motion:

Requesting a motion for the Board of Directors to approve the audit and tax services procurement and begin negotiations with James Moore & Company.

Respectfully submitted,

Jim Bos, Treasurer/Committee Chair

**CareerSource Suncoast
Audit & Tax Services RFP # 2025-01
Summary of Rater's Review**

PROPOSER (Alpha Listing)	RATER 1		RATER 2		RATER 3		TOTAL POINTS	TOTAL RANKING
	POINTS	STANDING	POINTS	STANDING	POINTS	STANDING		
James Moore & Company	100	1	95	1	93	2	288	1
MKA Certified Public Accountants	95	2	90	2	100	1	285	2
Warren Averrett	80	3	75	3	70	3	225	3

Prepared By: *Christina Witt*
Christina Witt (Mar 4, 2026 11:22:43 EST)

Date: 03/04/2026

Reviewed By: *Robin Dawson*
Robin Dawson (Mar 4, 2026 11:23:17 EST)

Date: 03/04/2026



**ACTION ITEM -
Transfer of Funds**



Prior Approval Transfer Request Form - WIOA Adult and Dislocated Worker (DW) Programs

From July 1, 2025 through June 30, 2026

LWDB Number and Name (Requestor): #18 - CareerSource Suncoast

Name / Title of Requestor Representative: Robin Dawson, CFAO

Adult and Dislocated Worker Transfer Request

Program Year	Program	Total Award Amount	Amount of Adult Requested to be Spent on DW	Percentage of Adult Requested to be Spent on DW	Amount of DW Requested to be Spent on Adult	Percentage of DW Requested to be Spent on Adult
PY25	Dislocated Worker	833,358.00	0.00	0	450,000.00	54%

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

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

PY25 Adult funds are estimated to be expended by 03.31.26. Dislocated workers are gravitating toward temp employment and rapid credentials, which we can fund using other grants.

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

We host a biweekly partners meeting featuring our school districts, post secondary providers, fellow nonprofits and government entities to share programs and services. We send twice monthly emails to all registered job seekers in the region. Our CEO presented to the Homeless to Home luncheon in December 2025. CareerSource also participates in a regional scholarship network and the Coalitions of Organizations Active in Disaster for both counties. CareerSource Suncoast created a referral platform called Crosswalk to easily connect clients to services inside and outside the organization.

Labor market conditions contributing to the need for the transfer:

Unemployment in LWDB #18 is at 4.9% as of Dec 2025 remains within 0.01% of a year ago. Most of our dislocated worker clients are coming in for NEGs Helene and Opioid.

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

We had expected to serve 70 new adult clients and 8 new dislocated worker clients. Our projections now are 112 adult clients and 12 dislocated workers.

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

I certify the following:

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

I certify the above information is true and correct.

Signature of Board Chair

David Kraft
Print Name

Date



ACTION ITEM - Budget Modification

CareerSource Suncoast
 Summary of Funds Available - All Programs **Modification #2**
 Program Year 2025-2026
 July 1, 2025 - June 30, 2026

Funding Streams	Mod #1 Adj Funding Avail PY 25-26	Increase or (Decrease) in Funding PY 25-26	Mod #2 Adj Funding Avail PY 25-26	Less Reserve for PY 26-27	Mod #2 Funding Budgeted for PY 25-26	Notes
Temporary Assistance for Needy Families (TANF) exp 6/30/26	\$1,089,534	\$0	\$1,089,534	\$0	\$1,089,534	
Temporary Assistance for Needy Families (TANF) CFWD exp 8/31/25	\$100,056	\$0	\$100,056	\$0	\$100,056	
Total Temporary Assistance for Needy Families	\$1,189,590	\$0	\$1,189,590	\$0	\$1,189,590	
WIOA-Adult & Dislocated Worker exp 6/30/27	\$1,875,199	\$0	\$1,875,199	(\$158,880)	\$1,716,319	
WIOA-Adult & Dislocated Worker Carry Fwd exp 6/30/26	\$372,086	\$0	\$372,086	\$0	\$372,086	
Total WIOA Adult & Dislocated Worker	\$2,247,285	\$0	\$2,247,285	(\$158,880)	\$2,088,405	
WIOA-Youth exp 6/30/27	\$719,270	\$0	\$719,270	(\$156,000)	\$563,270	
WIOA-Youth Carry Fwd exp 6/30/26	\$242,487	\$0	\$242,487	\$0	\$242,487	
Total WIOA Youth	\$961,757	\$0	\$961,757	(\$156,000)	\$805,757	
NEG Dislocated Worker Ian Carry Fwd exp 9/30/25	\$241,000	\$0	\$241,000	\$0	\$241,000	
NEG Dislocated Worker Helene Carry Fwd exp 9/30/26	\$1,504,670	\$0	\$1,504,670	(\$62,409)	\$1,442,261	
NEG Dislocated Worker Opioid exp 12/31/26	\$166,069	\$50,000	\$216,069	(\$25,708)	\$190,361	Additional funds received
WIOA State Rapid Response exp 6/30/26	\$90,000	\$0	\$90,000	\$0	\$90,000	
WIOA State Sectors of Strategic Focus (SOSF) exp 6/30/26	\$145,000	\$0	\$145,000	\$0	\$145,000	
WIOA State Rapid Credentialing exp 10/31/25	\$38,703	\$0	\$38,703	\$0	\$38,703	
WIOA Sector-Based Trng Initiative exp 9/30/25	\$8,122	\$0	\$8,122	\$0	\$8,122	
WIOA Hope exp 8/31/25	\$8,694	\$0	\$8,694	\$0	\$8,694	
Wagner Peyser 7B-Network Navigators exp 6/30/26	\$163,571	\$0	\$163,571	\$0	\$163,571	
Wagner Peyser 7A (WP) exp 9/30/26	\$612,020	\$0	\$612,020	(\$40,000)	\$572,020	
Wagner Peyser 7A (WP) Carry Fwd exp 9/30/25	\$161,595	\$0	\$161,595	\$0	\$161,595	
Total Wagner Peyser 7A	\$773,615	\$0	\$773,615	(\$40,000)	\$733,615	
State FL-Rural Initiatives exp 6/30/26	\$150,000	\$0	\$150,000	\$0	\$150,000	
State FL-Non-Custodial Parent Employment Prog exp 6/30/26	\$1,041,671	\$0	\$1,041,671	\$0	\$1,041,671	
Veteran's Programs (DVOP & LVER) estimate	\$105,948	\$0	\$105,948	\$0	\$105,948	
Reemployment Svcs & Eligibility Assess (RESEA) estimate	\$194,793	\$0	\$194,793	(\$31,042)	\$163,751	
Supple Nutrition Assist Prog Employment & Training (SNAP) est	\$80,617	\$0	\$80,617	(\$15,750)	\$64,867	
Total	\$9,111,105	\$50,000	\$9,161,105	(\$489,789)	\$8,671,316	Only change is increase in funding - Opioid

CareerSource Suncoast
 Budget **Mod #2**
 Program Year 2025-2026

	Mod #1 Funding Budgeted PY 25-26	Increase or (Decrease)	Mod #2 Funding Budgeted PY 25-26	Notes
Funding Available Less Reserves	\$8,621,316	\$50,000	\$8,671,316	For details of increase see Summary of Funds Available Mod #2 worksheet
Personnel Costs:				
Salaries & Fringe Benefits	\$4,510,508	\$2,350	\$4,512,858	Indirect for Opioid & transfer to ER & Client Svcs
Staff Training & Education	28,919		28,919	
Total Personnel Costs	\$4,539,427	\$2,350	\$4,541,777	
Facility Costs	\$512,000	\$0	\$512,000	
Office Furniture & Equipment	\$35,947	\$0	\$35,947	
Operating Costs-Career Ctrs & Adm:				
Accounting & Audit	\$87,032	\$0	\$87,032	
Consultants & Legal	53,500		53,500	
General Insurance	58,836		58,836	
Office Supplies & Expense	31,609		31,609	
Travel & Meetings	73,000		73,000	
Total Operating Costs	\$303,977	\$0	\$303,977	
Program Services:				
Client Training & Support	\$3,043,759	\$44,650	\$3,088,409	Increase to client trng & support for opioid grant
Employer & Client Services	41,800	3,000	44,800	Transfer fr Salaries/FB
Outreach	134,406		134,406	
Total Program Services	\$3,219,965	\$47,650	\$3,267,615	
Totals	\$8,611,316	\$50,000	\$8,661,316	



ACTION ITEM - Bylaws

CAREERSOURCE SUNCOAST
Bylaws Review Committee
Board of Directors and Executive Committee Summary
March 12, 2026

Background Information:

Bylaws are the provisions by which the local area is governed, and the Local Workforce Development Board(LWDB) and its operations are managed. They provide consistency and clarification on the roles and responsibilities of the various representatives governing the local workforce development system. The LWDB must ensure that its bylaws are up- to-date and in alignment with requirements of WIOA and state policy. CareerSource Florida (CSF)/ FloridaCommerce Policy #110 - Local workforce Development Area and Board Governance and Policy #091 - Local Workforce Development Board Composition and Certification are the state policies in which CareerSource Suncoast follow.

Bylaws Approval Summary:

The Bylaws Review Committee met on Wednesday, March 4, 2026. Members of the committee included: Lisa Eding, Chair and Sarah Tar

Christina Witt provided an overview of the purpose of the bylaws to the committee. All revisions were reviewed. The bylaws committee was provided a mark-up version of the current bylaws; changes were reflected in red font. A clean version of the revised bylaws has also been provided for a comparison and clear read.

Approved Summary of Significant Revisions:

- Section 4.4 -Term of Office
 - o An additional section to provide clear instructions on the renewal application process for expiring terms.
- Section 4.5 Vacancies
 - o Added notification process for vacant positions.
- Section 4.6 Removals
 - o Updated language for clarity on Chief Elected Local Officials authority to remove a Board member.
- Section 5.2(B) Duties
 - o Removed Finance & Performance Committee
- Section 6.2 Standing Committees
 - o Updated language stating that standing committees “must” have a non-board member to replace “may” have a non-board member.
 - o Non-Board members must submit an application to be appointed to a committee.
 - o Removal of the Finance & Performance standing committee.
- Section 7.3 Books and Records
 - o Removed requirement for the Treasure to certify the bylaws. CareerSource Florida policy and Code of Federal Regulation clearly state that the CLEO’s and Board Chair have authority to certify the Bylaws.
- Section 7.6 Budget
 - o Removed Finance & Performance Committee.

Requested Motion:

Requesting a motion for the Board of Directors to approve the revised CSS Bylaws to be presented to the Commission Coordinating Council for Approval on March 17, 2026.

Respectfully submitted,
Lisa Eding, Vice Chair/Committee Chair

BYLAWS OF SUNCOAST WORKFORCE BOARD, INC.

ARTICLE I – NAME, INCORPORATION, TAX EXEMPT STATUS, PURPOSES AND POWERS

Section 1.1. Name. The name of this Corporation shall be **Suncoast Workforce Board, Inc.**, dba CareerSource Suncoast also referred to herein as “the Board” and “the Corporation” and “CSS”.

Section 1.2. Incorporation. The Corporation is a not-for-profit corporation organized and existing under the laws of the State of Florida.

Section 1.3. Tax Exempt Status. The Corporation is intended to be an organization which is exempt from federal income taxation under Code Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder as the same now exist or as they may hereafter be amended from time to time.

Section 1.4. Suncoast Workforce Board, Inc. may also do business as CareerSource Suncoast.

Section 1.5. Mission and Purpose.

- A. Mission: Identify and invest in workforce development solutions to meet the needs of Manatee and Sarasota Counties.
- B. Vision: A highly skilled and responsive workforce that fuels a thriving economy.
- C. Values: Employer Centric, Integrity, Culture of Excellence, Collaboration, and Innovation.

The purpose of the Board shall be to provide strategic and operational oversight, assist in the achievement of the state's strategic and operational vision and goals, and maximize and continue to improve quality of services, customer satisfaction, and effectiveness of services provided for the Local Workforce Development Area (LWDA) serving Manatee and Sarasota counties. For a full list of functions and responsibilities of the Board, refer to CareerSource Florida Administrative Policy 110, WIOA, Section 107(d) and 20.CFR 679.370.

Section 1.6. Powers. The Corporation shall have and exercise all rights and powers stated in its Articles of Incorporation, Bylaws, and as permitted by the laws of the State of Florida for not-for-profit corporations, including, but not limited to, the power to do all acts necessary or proper for the administration of its affairs and the attainment of its purposes.

ARTICLE II – OFFICES

Section 2.1. Principal Office. The principal office of this Corporation in the State of Florida shall be located in the County of Sarasota or Manatee.

Section 2.2. Other Office. The Corporation may establish additional offices, as the Board of Directors may from time to time determine.

ARTICLE III – LIMITATION ON ACTIVITIES

Section 3.1. The Corporation shall be non-partisan, non-sectional and non-sectarian and shall take no part in, or lend its influence or facilities to, the nomination, election, or appointment of any candidate for public office.

ARTICLE IV – DIRECTORS

Section 4.1. Function. The Board of Directors is vested with the management of the business and affairs of the Corporation, and all corporate powers shall be exercised by or under the authority of the Board subject to law, the Articles of Incorporation, and these Bylaws. Management of the corporation shall not be inconsistent with the provisions of the Workforce Innovation and Opportunity Act, Public Law 113-128, Chapter 445, Florida Statutes, as the same may be amended from time to time.

Section 4.2. Structure. The Chief Local Elected Officials shall be the appointing authority for the members of the Board of Directors of the Corporation. Membership and appointments must take consideration to equitable minority and gender representation reflective of the diversity of the Local Workforce Development Area. Membership and appointment shall be consistent with the applicable provisions of Pub. L. No. 113-128 Title I and Chapter 445, Florida Statutes.

a. Business

A majority of the LWDB members must represent local businesses in the local area who:

- Are owners of a business, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;
- Represent businesses, including small businesses, or organizations representing businesses that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the local area (at least two representatives of small businesses must be included); and
- Are appointed from among individuals nominated by local business organizations and business trade associations.

[§ 107(b)(2)(A), WIOA]

b. Labor/Apprenticeships

No less than 20% of the members shall be representatives of the workforce within the local area, including:

- Include at least two representatives of labor organizations nominated by local labor federations. For a local area in which no employees are represented by such organizations, at least two other representatives of employees will be included.
- Include at least one representative of a labor organization or a training director from a joint labor-management apprenticeship program. If no such joint program exists in the area, at least one representative of an apprenticeship program in the area, if such a program exists.
- May include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or provide/support competitive integrated employment for individuals with disabilities.
- May include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives or organizations that serve out-of-school youth.

[§ 107(b)(2)(B), WIOA]

c. Education

Each local board shall include representatives of entities administering education and training activities in the local area, including:

- Include a representative of eligible providers administering adult education and literacy activities under Title II of WIOA.
- Include a representative of institutions of higher education providing workforce investment activities (including community colleges).
- Include a private education provider. CareerSource Florida may waive this requirement if requested by the LWDB if it is demonstrated that such representatives do not exist in the local area.
- May include representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment.

When there is more than one institution in each of the types of educational entities listed above, nominations are solicited from representatives of each of these entities.

[§ 107(b)(2)(C), WIOA, § 445.007(1), Fla. Stat.]

d. Governmental/Economic/Community Development and Other Entities

Each local board shall include representatives of governmental and economic and community development entities serving the local areas, including:

- Include a representative of economic and community development entities serving the local area. An economic agency is defined as including a local planning or zoning commission or board, a community development agency, or another local agency or institution responsible for regulating, promoting, or assisting in local economic development.
- Include a representative of Vocational Rehabilitation serving the local area.
- May include representatives of agencies or entities serving the local area relating to transportation, housing, and public assistance.
- May include representatives of philanthropic organizations serving the local area.
- May include other individuals or representatives of entities as the Chief Local Elected Officials in the local areas determines to be appropriate.

[§ 107(b)(2)(D) & (E), § 3(17) WIOA]

Section 4.3. Appointments

The CLEOs will coordinate with the President/CEO in identifying potential Board of Director members with consideration to equitable minority and gender representation reflective of the diversity of the Local Workforce Development Area.

Individuals applying for membership to the Board of Directors must complete the application posted on the CSS website. Applicants who are a member of the Business sector must also be recommended by a local business organization or business trade association. The application is reviewed for qualifications and then presented to the Commission Coordinating Council for review and approval. Once approved by the Commission Coordinating Council, the appointment date is recorded as the date of approval.

All Commission Coordinating Council meetings are publicly posted in accordance with the grantee-subgrantee agreement and Sunshine Law. Meeting frequency shall be set as needed.

Section 4.4. Term of Office.

- A. All appointments to the Board shall be for four (4) years, subject to approval of the Chief Local Elected Officials²⁵ and shall commence upon approval of the Chief Local Elected Officials.

~~B.~~ ~~B.~~ ~~When a Board member's term expires, they can reapply using the same process as the original procedure.~~ Members shall serve staggered terms and may not serve for more than eight (8) consecutive years, unless the member is a representative of a government entity. Individuals who have served eight (8) consecutive years may reapply for membership after not serving as a Board member for a minimum of one year.

~~B.C.~~ ~~When a Board member's term expires, they can submit a renewal application and must be reconfirmed by Chief Local Elected Officials. Members who are representatives of a government entity who hold the same position or status at appointment are exempt from the reapplication requirement and their term will automatically renew, as they are exempt from term limits.~~

Section 4.5. Vacancies. A vacancy shall occur automatically when a Board member no longer meets the criteria for membership as originally appointed in accordance with their category of membership.

~~A.~~ ~~Vacancies will be announced at the next scheduled Commission Coordinating Council and Board meeting.~~

~~A.B.~~ Vacancies in Board membership created by death, resignation or disqualification shall be filled by an appointment made in the same manner as the original appointment.

~~B.C.~~ Vacancies must be filled within a reasonable amount of time, but no more than twelve (12) months from the vacancy occurrence.

~~C.D.~~ New Board members must be appointed to fill the same category of membership as that in which the vacancy occurred; however, new members do not have to be from the same organization as the members being replaced. All appointments for vacancies shall begin a new term.

Section 4.6. Removals.

A. Absence of a member of the Board from three (3) consecutive regular meetings of the Board without a valid reason and/or prior written request shall be grounds for removal of the member from the Board. ~~upon recommendation of the Executive Committee and vote of the Board.~~

B. A member of the Board may be removed when deemed to be in the best interest of the Board upon recommendation by the Executive Committee, and a two-thirds (2/3) vote of the Board members present after a quorum is seated at a meeting noticed for said purpose.

- C. ~~Upon a motion~~The Board approved recommendation to remove a board member approved by the Board the recommendation for the removal of a member shall be communicated~~presented~~ to the Chief Local Elected Officials. The Chief Local Elected Officials may then~~appointing authority~~ which may act to remove the member ~~and shall then appoint an individual in the same category as the terminated member.~~
- D. Board members who no longer hold the position or status that made them eligible appointees must resign or be removed by the CLEO. Board members must reapply with their new position to be considered for re-appointment.

Section 4.7. Meetings. All meetings shall be open to the public and noticed in accordance with the requirements of the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes. The Board of Directors shall hold the following types of meetings:

- A. Regular Meetings. Regular meetings of the Board shall be held on a quarterly or more frequent basis if necessary. ~~The annual meeting shall be scheduled for the month of September.~~
- B. Ad-Hoc Meetings. Special meetings of the Board may be called by the Chair of the Board, a majority of the Executive Committee, or by no fewer than ten (10) members of the Board.
- C. The Chair shall designate the date, time, and place of meetings, otherwise, the President/CEO may do so.
- D. All meetings shall be held in a meeting place open and accessible to the general public in accordance with the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes. All meetings will have a virtual attendance and/or call-in option available.
- E. Parliamentary procedures not otherwise governed by the Bylaws shall be guided by with Roberts Rules of Order, Revised.
- F. Participation in meetings shall be limited to members of Board, or their designated representative (who shall have no voting rights and who shall not count toward a quorum at the meeting) with the following exceptions:
 1. Regularly scheduled agenda items that call for reports or participation by nonmembers.
 2. The Chairman shall allow for public comments or other participation by nonmembers on items under consideration before the group prior to the vote. However, the Chair may limit the time allotment for those seeking to comment.

Section 4.8. Quorum and Voting.

- A. A majority of the total current membership of the Board of Directors shall constitute a quorum for a meeting of the Board of Directors.
- B. Once a quorum has been seated, a vote by a majority of the members present is required to organize and conduct the business of the Board, except when otherwise provided for herein. There shall be no alternates or proxy voting. Board members may send a representative in their place but will not be counted toward a quorum.
- C. A Board member shall not cast a vote on, nor participate in, any decision-making capacity on the provision of services by such member (or any organization which that member directly represents) nor on any matter which would provide any direct financial benefit to that member, or a member of their immediate family as defined by the Florida Statutes. A Conflict-of-Interest form must be filled out by board members having any conflict and filed with the meeting minutes.

Section 4.9. Notice of Meetings. Written or electronic notice stating the place virtual link, the day and hour of the meeting together with a written agenda of the business to be conducted shall be emailed to all members entitled to vote at least seven (7) days in advance of the meeting. But in case of an emergency the Board Chair may call a meeting on less notice. Said notice shall be delivered by electronic mail and publicly posted on the CareerSource Suncoast Website. Items not on the agenda may be taken up subject to a two-thirds (2/3) vote of the members present and voting.

Section 4.10. Minutes. Minutes shall be prepared, documenting attendance and all formal actions of the Board and its Committees. Minutes will be posted on the corporation's website within 15 days of approval by the Board of Directors. Public postings will remain for the specific time period outlined in the Corporations Grantee-Subgrantee Agreement with the state.

Section 4.11. Powers. Except as otherwise provided in the Articles of Incorporation, Workforce Innovation and Opportunity Act, Public Law 113-128, Chapter 445, Florida Statutes, or these Bylaws, the powers of this Corporation shall be exercised, its properties controlled, and its affairs conducted by the Board of Directors, which may, however, delegate the performance of any duties or the exercise of any powers to such officers and agents as the Board may from time to time designate.

Section 4.12. Duties. In addition to all customary duties to be carried out by the Board of Directors, as set forth herein and as provided by law, including but not limited to the provisions of the Workforce Innovation and Opportunity Act, Public Law 113-128

Chapter 445, Florida Statutes, or these Bylaws as amended from time to time, the duties of the Board of Directors of this Corporation shall include:

~~A.~~ Annually establishing, reviewing and/or amending performance goals for the Corporation designed to fulfill the mission of the Corporation.

~~A.~~

~~A.B.~~ The Board of Directors and its officers shall be responsible for the prudent use by the Corporation of all public and private funds and shall ensure that the use of each fund is in accordance with all applicable laws, Bylaws, or contractual requirements.

~~B.C.~~ The Board of Directors and its officers shall be responsible for selecting and hiring a President/Chief Executive Officer to perform operational and administrative functions of the corporation.

~~C.D.~~ In the performance of its functions and duties, the Board of Directors may establish and implement policies, strategies, and programs so long as they are not in conflict with state or federal law.

~~D.E.~~ Except as delegated or authorized by the Board of Directors, individual Board members have no authority to control or direct the operations of the Corporation or the actions of its officers and employees, including the President/CEO.

~~E.F.~~ Board Members appointed to the Board of Directors are required to participate in orientation and annual refresher training to ensure they understand the purpose of their participation on the Board to effectively serve. All new Board Members must complete the orientation within six (6) months of appointment. The Board is responsible for developing Board Member orientation.

~~F.G.~~ New Board of Directors Members and refresher training may be offered in-person and/or virtually at the discretion of the Board. New Board of Directors Members and refresher training may be offered in-person and/or virtually at the discretion of the Board. The Board must retain and provide attendance records of participants and the dates of completion.

Section 4.13. Common Trust Funds. The Board of Directors may duly adopt and establish one or more common trust funds for the purpose of furnishing investments to the Corporation, or to any organization for any purpose permitted exempt organizations as set forth in Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder as the same now exist or as they may hereafter be amended from time to time, or to any organization, society, or corporation holding funds or property for the benefit of any of the foregoing institutions whether holding such

funds or property as fiduciary or otherwise, subject to such terms and conditions as are set forth in the Articles of Incorporation of this Corporation and Bylaws.

Section 4.14. Indemnification of Officers and Directors and Bonding. The Board shall indemnify, defend, save, and hold harmless each member from personal liability to the maximum extent authorized by law as same may exist from time to time. It is specifically understood that each member is serving in a volunteer capacity and without compensation. It is the intent of this Article that no member shall have personal liability for his or her acts or omissions, except in those instances where the Board is prohibited, by law, from indemnifying, defending, saving, and holding harmless such member. The Suncoast Workforce Board, Inc. will therefore maintain Directors and Officers liability insurance for board members.

The rights accruing to any person under the foregoing provisions of this Section shall not exclude any other right to which such person may be lawfully entitled, nor shall anything herein contained, restrict the right of the Corporation to indemnify or reimburse such person in any proper case even though not specifically herein provided for.

The Directors of this Corporation shall not be personally liable for its debts, liabilities, or other obligations.

The President/CEO and such other officers and staff as the Board of Directors may designate shall be bonded by a sufficient fidelity bond in the amount set forth under State and Federal requirements and shall be protected through the purchase of Directors and Officers Liability Insurance.

ARTICLE V – OFFICERS

Section 5.1. Elected and Appointed Officers: The officers of the Corporation shall consist of a President/CEO, a Chair, a Chair-Elect, and a Treasurer designated by the Board. The Chair may also appoint at-large Board member(s). The Chair-Elect and the Treasurer may be the same person.

An at-large Board member is a Board member that does not hold a defined position within the Board of Directors.

Section 5.2. Duties. The officers of the Corporation shall have the following duties:

- A. President/CEO. The President/CEO of the Corporation shall be hired by the Board of Directors who shall determine the salary and other terms and conditions of employment, upon the recommendation of the Executive Committee.

The President/CEO is the chief administrative and operational officer of the Board of Directors and of the Corporation and shall direct and supervise the

administrative affairs of the Board of Directors and any Committees of the Corporation. The Board of Directors may delegate to the President/CEO those powers and responsibilities it deems appropriate.

The President/CEO shall have the authority to assign any of the following duties or responsibilities to another CSS executive staff member to act as a designee executive in the President/CEO's stead, in the event the President/CEO is unavailable.

The President/CEO or their designee shall have authority to hire, supervise, direct, and terminate all employees, and to determine their compensation within approved budget limitations.

The President/CEO or their designee shall have the authority to enter into contracts and MOUs.

The President/CEO shall have overall responsibility for the development, planning and implementation of the workforce development program including WIOA adult, dislocated worker, youth programs and the entire one-stop delivery system for the Corporation in accordance with policies established by the Board of Directors.

The President/CEO shall establish staff policies, participate in the preparation of annual budgets, monitor the administration of the programs, engage the services of outside professionals, and otherwise attend to the day-to-day operation of the Corporation and carry out the instructions of the Board of Directors and the Executive Committee.

The President/CEO shall be ex-officio, non-voting member of the Board, Executive Committee, and all other Committees serving as the advisor to the Board Chair and all Committee Chairs and shall assemble information and data to be used to prepare reports as directed by the Board.

In coordination with the Treasurer, the President/CEO shall be responsible for the preparation of an operating budget covering all activities of the Board, subject to approval by the Board. The President/CEO shall further be authorized to make disbursements within approved budget allocations.

The President/CEO shall report to the Board through the Executive Committee. The Executive Committee shall review the performance of the President/CEO on an annual basis.

The President/CEO shall serve as the Executive Secretary of the Corporation. The President/CEO shall keep a record of the proceedings of the Board of Directors and is the custodian of all books, documents, and papers filed with the Board of Directors, the minutes of the meetings, and all

board membership records, and exhibit such records to any director of the Corporation, or to his agent, or to any person or agency authorized by law to inspect them, at all reasonable times and on demand.

The President/CEO shall coordinate with the CLEOs regarding the identification and nomination of Board members to the LWDB and ensuring membership is compliant with WIOA and Florida Statutes;

The President/CEO shall organize board meetings and ensure meetings are held in accordance with the LWDB's bylaws and Florida's sunshine laws;

The President/CEO shall coordinate with the Board of Directors and CLEOs, in developing and submitting the local and regional workforce development plan;

The President/CEO shall negotiate and reach an agreement on local performance measures with the CLEOs and the state;

The President/CEO shall certify the one-stop career centers.

The President/CEO shall ensure the outcomes of local performance measures are provided to the LWDB members and CLEO no less than semi-annually. The President/CEO shall negotiate with CLEO and required partners for the Memorandum of Understanding as prescribed in Administrative Policy 106-Memorandums of Understanding and Infrastructure Funding Agreements.

The President/CEO shall provide oversight of the competitive procurement process for procuring or awarding contracts for providers of youth program services, providers of workforce services (if applicable), and the one-stop operator as required in paragraph (i) of 20 CFR 679.370;

The President/CEO shall provide copies of all monitoring and audit reports and related materials to the LWDB members, LWDB chairperson, and CLEO within five business days of receipt.

- B. Chair. The Chair shall be elected from among the members of the Board who are representatives of the private business sector and shall have been a member of the Board for at least one (1) year prior to taking office. The Chair may serve for a term of no more than two years, with service limited to two consecutive terms.

The Chair shall appoint Committee Chairs for all Committees from members of the Board. The Chair may serve on all Committees and shall perform such other duties as set forth in the Bylaws or as determined by the Board.

The Chair shall lead the board to develop a strategic plan that aligns with the state's priorities;

The Chair shall act as the lead strategic convener to promote and broker effective relationships between CLEOs and economic development, education, and workforce partners in the local area;

The Chair shall lead an executive committee to guide the work of the board, and ensure that committees or task forces have necessary leadership and membership to perform the work of the board; and

The Chair shall lead the agenda setting process for the year and guide meetings to ensure both tactical and strategic work is completed in all meetings.

The Chair shall appoint members to the Education and Industry Consortium;

The Chair shall provide the annual performance review of the President/CEO to the CLEO(s) and at least once annually to the Board of Directors, and upon request of the LWDB; and

The Chair shall, upon the request of the state board, appear before the state workforce development board (state board) to discuss the performance of the LWDB.

- C. Chair-Elect. The Chair-Elect shall be elected from among the members of the Board who are representatives of the private business sector and shall have been a member of the Board for at least one (1) year prior to taking office, and shall, in the absence of the Chair or in the event of the Chair's inability, perform the duties of the Chair and shall perform such other duties as are assigned by the Chair.
- D. Treasurer. The Treasurer shall serve on the Executive Committee ~~and as the chair of the Finance & Performance Committee~~. The Treasurer is responsible to the Board for oversight of the Corporation's financial management system.

Section 5.3. Officer Nominating Committee. The Nominating Committee shall be appointed by the Chair. The Nominating Committee shall accept recommendations from the Board in assembling a slate of officers. The Nominating Committee will recommend to the full Board a slate of officers to serve on the Executive Committee.

Section 5.4. Elections. Officers shall be elected on two-year cycles. The Nominating Committee will provide the recommended slate of officers to be voted and approved by majority vote of full Board of Directors, when a quorum is established. The confirmed slate of Officers will be installed at the annual Board meeting held in September.

Officers shall serve a two-year term commencing the day of the installation at the annual meeting and ending upon the installation of a replacement at the annual meeting of the Board. The terms of the officers are limited to two (2) consecutive two-year terms in the same office. There are no limitations on the number of terms, not in sequences or in different offices.

Section 5.5. Removal. The Board of Directors may recommend to the Chief Local Elected Officials the removal of any officer when it is deemed in the best interest of the Corporation.

ARTICLE VI – COMMITTEES

Section 6.1. Executive Committee.

- A. The Executive Committee shall be composed of the Chair, Chair-Elect, Treasurer, Chairs of all Committees, and at-large Board member, with the Past Chair having the choice of serving on the Executive Committee. At least a majority of the members of the Executive Committee shall be representatives of the private business sector. The Executive Committee is empowered to act and take necessary interim action between meetings of the Board.
- B. The Executive Committee and the President/CEO shall have such additional authority as the Board of Directors lawfully delegates to it.
- C. The Executive Committee shall assist the Treasurer with financial and performance review responsibilities and shall review the President/CEO's recommended budget and make recommendations regarding the budget to the Board. The annual audit will be reviewed by the Executive Committee when the audit report is completed.

Section 6.2. Standing Committees. The Chair may appoint committees to fulfill the Boards' responsibilities to obtain technical assistance. The Board Chair shall name a Committee Chair for each Committee from among the members of the Committee who are also members of the Board of Directors. Each Committee may meet at the

call of its Chair or at the direction of the Board of Directors but shall meet at least quarterly. Standing Committees ~~may~~must include non-Board members, but the Chair and Vice Chair of all Committees shall be members of the Board.

Non-Board member committee members must apply for committee membership and be appointed by the Board Chair.

~~Finance & Performance Committee. The Finance & Performance Committee shall review the President/CEO's recommended budget and make recommendations regarding the budget to the Executive Committee. The Finance & Performance Committee shall consist of the Treasurer as the Chair of the Committee, and such members of the Board of Directors as are appointed by the Chair. The Finance & Performance Committee shall serve as the Audit Committee.~~

Section 6.3. Ad hoc Committees. Ad hoc Committees may be created and established by the Board of Directors. The scope and function, including any budget allocation, shall be established by the Board. Any special committee created by the Board of Directors shall automatically be abolished one (1) year after its creation unless the need for its continued existence is justified to the satisfaction of the Board of Directors. Ad- Hoc Committees may include non-Board members, but the Chair and Vice Chair of all Committees shall be members of the Board. The Board Chair will appoint committee members.

Section 6.4. Compliance with Sunshine Law. All Committee meetings shall be noticed and conducted in compliance with the requirements of the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes.

ARTICLE VII – OPERATIONS

Section 7.1. Fiscal Year. The fiscal year of the Corporation shall be July 1st through June 30th of the following calendar year.

Section 7.2. Execution of Documents. The President/CEO or their designee shall have the authority to enter into contracts as the Board or Executive Committee may approve from time to time, or as approved by the Board or Executive Committee through the enactment of policies pertaining to matters of procurement and program delivery.

Section 7.3. Books and Records. The Corporation shall keep correct and complete books and records of account and shall keep minutes on the proceedings of the Board of Directors. The Corporation shall keep at its principal place of business a membership register listing the names, addresses and other details of each Board of Directors' member, and the original or a copy of its Bylaws, including amendments to date, certified by the Treasurer of the Corporation.

Section 7.4. Inspection of Books and Records. All books and records of the Corporation shall be public records subject to inspection and copying as provided for in Chapter 119, Florida Statutes, as amended from time to time.

Section 7.5. Contracts. The Corporation shall have the authority to contract with public and private entities as necessary to further the purposes of the Corporation. All contracts executed by the Corporation must include specific performance expectations and deliverables.

Section 7.6. Budget. The Board of Directors of this Corporation shall adopt for each fiscal year a budget for the organization in accordance with the requirements of law. A budget shall be prepared annually prior to the commencement of the fiscal year. The President/CEO shall be responsible for preparation of the budget. The President/CEO will present the budget for review by the ~~Finance & Performance Committee and the~~ Executive Committee and approval by the Board of Directors. Allocation and expenditure of the funds of the Corporation shall be governed by the budget previously approved for the current fiscal year. The budget may be amended from time to time by the Board of Directors.

Section 7.7. Gifts and Contributions. The Board of Directors is authorized to accept on behalf of the Corporation any contribution, gift, bequest, or devise of any property whatsoever, for the general and special purposes of this Corporation. The Board of Directors may from time to time on behalf of the Corporation accept gifts of money or securities upon such terms as they shall approve, and may hold such cash or securities in the name of the Corporation or of such nominee or nominees as the Board of Directors may appoint, and may collect and receive the income thereof and devote the principal or income of such gifts to such purposes within the scope of the activities of the Corporation as the Board of Directors may determine.

The Board of Directors may enter into an agreement with any donor to continue to devote the principal or income of his gift to such particular purpose as the donor may designate, provided that such purpose is duly approved or ratified by resolution of the Board of Directors; and after such agreement, the principal or income of that particular gift shall be devoted in accordance with such agreement for the time specified therein.

Section 7.8. Deposits. All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies, or other depositories as the Board of Directors may select.

ARTICLE VIII – AMENDMENT

Section 8.1. Amendment. The Bylaws may be altered, amended, or repealed and new Bylaws adopted by the affirmative vote of a majority of the full membership of the Board at

a regular or special meeting, provided that any proposal to alter, amend or repeal Bylaws be submitted to each Board member at least fifteen (15) days prior to the meeting at which the proposal is to be considered.

ARTICLE IX – PROHIBITION AGAINST SHARING IN CORPORATE EARNINGS

Section 9.1. Prohibition Against Sharing in Corporate Earnings. No member, director, officer, or employee of or member of a Committee of or person connected with the Corporation, or any other private individual shall receive at any time any of the net earnings or pecuniary profit from the operations of the Corporation, provided that this shall not prevent the payment to any such person of such reasonable compensation for services rendered to or for the Corporation in effecting any of its purposes as shall be fixed by the Board of Directors; and no such person or persons shall be entitled to share in the distribution of any of the Corporate assets upon the dissolution of the Corporation. All members of the Corporation shall be deemed to have expressly consented and agreed that upon such dissolution or winding up of the affairs of the Corporation, whether voluntary or involuntary, the assets of the Corporation, after all debts have been satisfied, remaining in the hands of the Board of Directors shall be distributed within the intendment of Section 501(c) of the Internal Revenue code of 1954 and its Regulations as they now exist or as they may be amended, and consistent with other applicable law.

ARTICLE X – EXEMPT ACTIVITIES

Section 10.1. Exempt Activities. Notwithstanding any other provision of these Bylaws or the Articles of Incorporation, no member, director, officer, employee, or representative of this Corporation shall take any action or carry on any activity by or on behalf of the Corporation not permitted to be taken or carried on by an organization exempt under Section 501(c) of the Internal Revenue Code of 1954 and its Regulations as they now exist or as they may be amended.

ARTICLE XI – DISSOLUTION OF CORPORATION

Section 11.1. Dissolution. In the event of the liquidation or dissolution of the Corporation, whether voluntary or involuntary, no member shall be entitled to any distribution or division of its remaining property or its proceeds, and the balance of all money and other property received by the Corporation from any source, after the payment of all debts and obligations of the Corporation, shall be used or distributed to the State of Florida within the intendment of Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder.

ARTICLE XII – NON-DISCRIMINATION POLICY

Section 12.1 The members, Officers, Directors, committee members, employees, and persons served by this Corporation shall be interviewed, selected, appointed, and promoted

without regard to race, color, religion, sex, national origin, age, disability, handicap, marital status, sexual orientation, or status as a veteran except as provided for in applicable federal and/or state legislation.

ARTICLE XIII – HARASSMENT POLICY

Section 13.1 It is the policy of the Corporation to strive for an environment that is free from all forms of Harassment based upon a protected category. Harassment based upon any of the categories found in Article XII, or found in any federal, state, or local law, in any manner or form is expressly prohibited. Any concerns and complaints should be brought to the attention of the Board Chair, or the President/CEO. CareerSource Suncoast also has a Whistleblower Policy with an Integrity Hotline posted on the CSS Website, which goes to the attention of the Board Chair.

WE HEREBY CERTIFY that these Bylaws have been adopted by the Board of Directors of the Suncoast Workforce Board, Inc., dba CareerSource Suncoast on the _____ day of _____, 2026, by the requisite affirmative vote of a majority of the full membership of the Board pursuant to the prior Bylaws.

DRAFT

David Kraft, Chair of the Board of Directors

Date: _____

Joshua Matlock, President/CEO/Executive Secretary to the Board of Directors

Date: _____

CHIEF LOCAL ELECTED OFFICIALS:

Manatee County Commissioner

Sarasota County Commissioner

Name: Tal Siddique

Name: Teresa Mast

Signature: _____

Signature: _____

Date: _____

Date: _____

DRAFT

BYLAWS OF SUNCOAST WORKFORCE BOARD, INC.

ARTICLE I – NAME, INCORPORATION, TAX EXEMPT STATUS, PURPOSES AND POWERS

Section 1.1. Name. The name of this Corporation shall be **Suncoast Workforce Board, Inc.**, dba CareerSource Suncoast also referred to herein as “the Board” and “the Corporation” and “CSS”.

Section 1.2. Incorporation. The Corporation is a not-for-profit corporation organized and existing under the laws of the State of Florida.

Section 1.3. Tax Exempt Status. The Corporation is intended to be an organization which is exempt from federal income taxation under Code Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder as the same now exist or as they may hereafter be amended from time to time.

Section 1.4. Suncoast Workforce Board, Inc. may also do business as CareerSource Suncoast.

Section 1.5. Mission and Purpose.

- A. Mission: Identify and invest in workforce development solutions to meet the needs of Manatee and Sarasota Counties.
- B. Vision: A highly skilled and responsive workforce that fuels a thriving economy.
- C. Values: Employer Centric, Integrity, Culture of Excellence, Collaboration, and Innovation.

The purpose of the Board shall be to provide strategic and operational oversight, assist in the achievement of the state's strategic and operational vision and goals, and maximize and continue to improve quality of services, customer satisfaction, and effectiveness of services provided for the Local Workforce Development Area (LWDA) serving Manatee and Sarasota counties. For a full list of functions and responsibilities of the Board, refer to CareerSource Florida Administrative Policy 110, WIOA, Section 107(d) and 20.CFR 679.370.

Section 1.6. Powers. The Corporation shall have and exercise all rights and powers stated in its Articles of Incorporation, Bylaws, and as permitted by the laws of the State of Florida for not-for-profit corporations, including, but not limited to, the power to do all acts necessary or proper for the administration of its affairs and the attainment of its purposes.

ARTICLE II – OFFICES

Section 2.1. Principal Office. The principal office of this Corporation in the State of Florida shall be located in the County of Sarasota or Manatee.

Section 2.2. Other Office. The Corporation may establish additional offices, as the Board of Directors may from time to time determine.

ARTICLE III – LIMITATION ON ACTIVITIES

Section 3.1. The Corporation shall be non-partisan, non-sectional and non-sectarian and shall take no part in, or lend its influence or facilities to, the nomination, election, or appointment of any candidate for public office.

ARTICLE IV – DIRECTORS

Section 4.1. Function. The Board of Directors is vested with the management of the business and affairs of the Corporation, and all corporate powers shall be exercised by or under the authority of the Board subject to law, the Articles of Incorporation, and these Bylaws. Management of the corporation shall not be inconsistent with the provisions of the Workforce Innovation and Opportunity Act, Public Law 113-128, Chapter 445, Florida Statutes, as the same may be amended from time to time.

Section 4.2. Structure. The Chief Local Elected Officials shall be the appointing authority for the members of the Board of Directors of the Corporation. Membership and appointments must take consideration to equitable minority and gender representation reflective of the diversity of the Local Workforce Development Area. Membership and appointment shall be consistent with the applicable provisions of Pub. L. No. 113-128 Title I and Chapter 445, Florida Statutes.

a. Business

A majority of the LWDB members must represent local businesses in the local area who:

- Are owners of a business, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;
- Represent businesses, including small businesses, or organizations representing businesses that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the local area (at least two representatives of small businesses must be included); and
- Are appointed from among individuals nominated by local business organizations and business trade associations.

[§ 107(b)(2)(A), WIOA]

b. Labor/Apprenticeships

No less than 20% of the members shall be representatives of the workforce within the local area, including:

- Include at least two representatives of labor organizations nominated by local labor federations. For a local area in which no employees are represented by such organizations, at least two other representatives of employees will be included.
- Include at least one representative of a labor organization or a training director from a joint labor-management apprenticeship program. If no such joint program exists in the area, at least one representative of an apprenticeship program in the area, if such a program exists.
- May include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or provide/support competitive integrated employment for individuals with disabilities.
- May include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives or organizations that serve out-of-school youth.

[§ 107(b)(2)(B), WIOA]

c. Education

Each local board shall include representatives of entities administering education and training activities in the local area, including:

- Include a representative of eligible providers administering adult education and literacy activities under Title II of WIOA.
- Include a representative of institutions of higher education providing workforce investment activities (including community colleges).
- Include a private education provider. CareerSource Florida may waive this requirement if requested by the LWDB if it is demonstrated that such representatives do not exist in the local area.
- May include representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment.

When there is more than one institution in each of the types of educational entities listed above, nominations are solicited from representatives of each of these entities.

[§ 107(b)(2)(C), WIOA, § 445.007(1), Fla. Stat.]

d. Governmental/Economic/Community Development and Other Entities

Each local board shall include representatives of governmental and economic and community development entities serving the local areas, including:

- Include a representative of economic and community development entities serving the local area. An economic agency is defined as including a local planning or zoning commission or board, a community development agency, or another local agency or institution responsible for regulating, promoting, or assisting in local economic development.
- Include a representative of Vocational Rehabilitation serving the local area.
- May include representatives of agencies or entities serving the local area relating to transportation, housing, and public assistance.
- May include representatives of philanthropic organizations serving the local area.
- May include other individuals or representatives of entities as the Chief Local Elected Officials in the local areas determines to be appropriate.

[§ 107(b)(2)(D) & (E), § 3(17) WIOA]

Section 4.3. Appointments

The CLEOs will coordinate with the President/CEO in identifying potential Board of Director members with consideration to equitable minority and gender representation reflective of the diversity of the Local Workforce Development Area.

Individuals applying for membership to the Board of Directors must complete the application posted on the CSS website. Applicants who are a member of the Business sector must also be recommended by a local business organization or business trade association. The application is reviewed for qualifications and then presented to the Commission Coordinating Council for review and approval. Once approved by the Commission Coordinating Council, the appointment date is recorded as the date of approval.

All Commission Coordinating Council meetings are publicly posted in accordance with the grantee-subgrantee agreement and Sunshine Law. Meeting frequency shall be set as needed.

Section 4.4. Term of Office.

- A. All appointments to the Board shall be for four (4) years, subject to approval of the Chief Local Elected Officials, and shall commence upon approval of the Chief Local Elected Officials.

- B. Members shall serve staggered terms and may not serve for more than eight (8) consecutive years, unless the member is a representative of a government entity. Individuals who have served eight (8) consecutive years may reapply for membership after not serving as a Board member for a minimum of one year.
- C. When a Board member's term expires, they can submit a renewal application and must be reconfirmed by Chief Local Elected Officials. Members who are representatives of a government entity who hold the same position or status at appointment are exempt from the reapplication requirement and their term will automatically renew, as they are exempt from term limits.

Section 4.5. Vacancies. A vacancy shall occur automatically when a Board member no longer meets the criteria for membership as originally appointed in accordance with their category of membership.

- A. Vacancies will be announced at the next scheduled Commission Coordinating Council and Board meeting.
- B. Vacancies in Board membership created by death, resignation or disqualification shall be filled by an appointment made in the same manner as the original appointment.
- C. Vacancies must be filled within a reasonable amount of time, but no more than twelve (12) months from the vacancy occurrence.
- D. New Board members must be appointed to fill the same category of membership as that in which the vacancy occurred; however, new members do not have to be from the same organization as the members being replaced. All appointments for vacancies shall begin a new term.

Section 4.6. Removals.

- A. Absence of a member of the Board from three (3) consecutive regular meetings of the Board without a valid reason and/or prior written request shall be grounds for removal of the member from the Board.
- B. A member of the Board may be removed when deemed to be in the best interest of the Board upon recommendation by the Executive Committee, and a two-thirds (2/3) vote of the Board members present after a quorum is seated at a meeting noticed for said purpose.

- C. The Board approved recommendation to remove a board member shall be presented to the Chief Local Elected Officials. The Chief Local Elected Officials may then act to remove the member.
- D. Board members who no longer hold the position or status that made them eligible appointees must resign or be removed by the CLEO. Board members must reapply with their new position to be considered for re-appointment.

Section 4.7. Meetings. All meetings shall be open to the public and noticed in accordance with the requirements of the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes. The Board of Directors shall hold the following types of meetings:

- A. Regular Meetings. Regular meetings of the Board shall be held on a quarterly or more frequent basis if necessary. The annual meeting shall be scheduled for the month of September.
- B. Ad-Hoc Meetings. Special meetings of the Board may be called by the Chair of the Board, a majority of the Executive Committee, or by no fewer than ten (10) members of the Board.
- C. The Chair shall designate the date, time, and place of meetings, otherwise, the President/CEO may do so.
- D. All meetings shall be held in a meeting place open and accessible to the general public in accordance with the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes. All meetings will have a virtual attendance and/or call-in option available.
- E. Parliamentary procedures not otherwise governed by the Bylaws shall be guided by with Roberts Rules of Order, Revised.
- F. Participation in meetings shall be limited to members of Board, or their designated representative (who shall have no voting rights and who shall not count toward a quorum at the meeting) with the following exceptions:
 - 1. Regularly scheduled agenda items that call for reports or participation by nonmembers.
 - 2. The Chairman shall allow for public comments or other participation by nonmembers on items under consideration before the group prior to the vote. However, the Chair may limit the time allotment for those seeking to comment.

Section 4.8. Quorum and Voting.

- A. A majority of the total current membership of the Board of Directors shall constitute a quorum for a meeting of the Board of Directors.
- B. Once a quorum has been seated, a vote by a majority of the members present is required to organize and conduct the business of the Board, except when otherwise provided for herein. There shall be no alternates or proxy voting. Board members may send a representative in their place but will not be counted toward a quorum.
- C. A Board member shall not cast a vote on, nor participate in, any decision-making capacity on the provision of services by such member (or any organization which that member directly represents) nor on any matter which would provide any direct financial benefit to that member, or a member of their immediate family as defined by the Florida Statutes. A Conflict-of-Interest form must be filled out by board members having any conflict and filed with the meeting minutes.

Section 4.9. Notice of Meetings. Written or electronic notice stating the place virtual link, the day and hour of the meeting together with a written agenda of the business to be conducted shall be emailed to all members entitled to vote at least seven (7) days in advance of the meeting. But in case of an emergency the Board Chair may call a meeting on less notice. Said notice shall be delivered by electronic mail and publicly posted on the CareerSource Suncoast Website. Items not on the agenda may be taken up subject to a two-thirds (2/3) vote of the members present and voting.

Section 4.10. Minutes. Minutes shall be prepared, documenting attendance and all formal actions of the Board and its Committees. Minutes will be posted on the corporation's website within 15 days of approval by the Board of Directors. Public postings will remain for the specific time period outlined in the Corporations Grantee-Subgrantee Agreement with the state.

Section 4.11. Powers. Except as otherwise provided in the Articles of Incorporation, Workforce Innovation and Opportunity Act, Public Law 113-128, Chapter 445, Florida Statutes, or these Bylaws, the powers of this Corporation shall be exercised, its properties controlled, and its affairs conducted by the Board of Directors, which may, however, delegate the performance of any duties or the exercise of any powers to such officers and agents as the Board may from time to time designate.

Section 4.12. Duties. In addition to all customary duties to be carried out by the Board of Directors, as set forth herein and as provided by law, including but not limited to the provisions of the Workforce Innovation and Opportunity Act, Public Law 113-128 Chapter 445, Florida Statutes, or these Bylaws as amended from time to time, the duties of the Board of Directors of this Corporation shall include:

- A. Annually establishing, reviewing and/or amending performance goals for the Corporation designed to fulfill the mission of the Corporation.
- B. The Board of Directors and its officers shall be responsible for the prudent use by the Corporation of all public and private funds and shall ensure that the use of each fund is in accordance with all applicable laws, Bylaws, or contractual requirements.
- C. The Board of Directors and its officers shall be responsible for selecting and hiring a President/Chief Executive Officer to perform operational and administrative functions of the corporation.
- D. In the performance of its functions and duties, the Board of Directors may establish and implement policies, strategies, and programs so long as they are not in conflict with state or federal law.
- E. Except as delegated or authorized by the Board of Directors, individual Board members have no authority to control or direct the operations of the Corporation or the actions of its officers and employees, including the President/CEO.
- F. Board Members appointed to the Board of Directors are required to participate in orientation and annual refresher training to ensure they understand the purpose of their participation on the Board to effectively serve. All new Board Members must complete the orientation within six (6) months of appointment. The Board is responsible for developing Board Member orientation.
- G. New Board of Directors Member and refresher training may be offered in-person and/or virtually at the discretion of the Board. New Board of Directors Member and refresher training may be offered in-person and/or virtually at the discretion of the Board. The Board must retain and provide attendance records of participants and the dates of completion.

Section 4.13. Common Trust Funds. The Board of Directors may duly adopt and establish one or more common trust funds for the purpose of furnishing investments to the Corporation, or to any organization for any purpose permitted exempt organizations as set forth in Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder as the same now exist or as they may hereafter be amended from time to time, or to any organization, society, or corporation holding funds or property for the benefit of any of the foregoing institutions whether holding such funds or property as fiduciary or otherwise, subject to such terms and conditions as are set forth in the Articles of Incorporation of this Corporation and Bylaws.

Section 4.14. Indemnification of Officers and Directors and Bonding. The Board shall indemnify, defend, save, and hold harmless each member from personal liability to the maximum extent authorized by law as same may exist from time to time. It is specifically understood that each member is serving in a volunteer capacity and

without compensation. It is the intent of this Article that no member shall have personal liability for his or her acts or omissions, except in those instances where the Board is prohibited, by law, from indemnifying, defending, saving, and holding harmless such member. The Suncoast Workforce Board, Inc. will therefore maintain Directors and Officers liability insurance for board members.

The rights accruing to any person under the foregoing provisions of this Section shall not exclude any other right to which such person may be lawfully entitled, nor shall anything herein contained, restrict the right of the Corporation to indemnify or reimburse such person in any proper case even though not specifically herein provided for.

The Directors of this Corporation shall not be personally liable for its debts, liabilities, or other obligations.

The President/CEO and such other officers and staff as the Board of Directors may designate shall be bonded by a sufficient fidelity bond in the amount set forth under State and Federal requirements and shall be protected through the purchase of Directors and Officers Liability Insurance.

ARTICLE V – OFFICERS

Section 5.1. Elected and Appointed Officers: The officers of the Corporation shall consist of a President/CEO, a Chair, a Chair-Elect, and a Treasurer designated by the Board. The Chair may also appoint at-large Board member(s). The Chair-Elect and the Treasurer may be the same person.

An at-large Board member is a Board member that does not hold a defined position within the Board of Directors.

Section 5.2. Duties. The officers of the Corporation shall have the following duties:

- A. President/CEO. The President/CEO of the Corporation shall be hired by the Board of Directors who shall determine the salary and other terms and conditions of employment, upon the recommendation of the Executive Committee.

The President/CEO is the chief administrative and operational officer of the Board of Directors and of the Corporation and shall direct and supervise the administrative affairs of the Board of Directors and any Committees of the Corporation. The Board of Directors may delegate to the President/CEO those powers and responsibilities it deems appropriate.

The President/CEO shall have the authority to assign any of the following duties or responsibilities to another CSS executive staff member to act as a

designee executive in the President/CEO's stead, in the event the President/CEO is unavailable.

The President/CEO or their designee shall have authority to hire, supervise, direct, and terminate all employees, and to determine their compensation within approved budget limitations.

The President/CEO or their designee shall have the authority to enter into contracts and MOUs.

The President/CEO shall have overall responsibility for the development, planning and implementation of the workforce development program including WIOA adult, dislocated worker, youth programs and the entire one-stop delivery system for the Corporation in accordance with policies established by the Board of Directors.

The President/CEO shall establish staff policies, participate in the preparation of annual budgets, monitor the administration of the programs, engage the services of outside professionals, and otherwise attend to the day-to-day operation of the Corporation and carry out the instructions of the Board of Directors and the Executive Committee.

The President/CEO shall be ex-officio, non-voting member of the Board, Executive Committee, and all other Committees serving as the advisor to the Board Chair and all Committee Chairs and shall assemble information and data to be used to prepare reports as directed by the Board.

In coordination with the Treasurer, the President/CEO shall be responsible for the preparation of an operating budget covering all activities of the Board, subject to approval by the Board. The President/CEO shall further be authorized to make disbursements within approved budget allocations.

The President/CEO shall report to the Board through the Executive Committee. The Executive Committee shall review the performance of the President/CEO on an annual basis.

The President/CEO shall serve as the Executive Secretary of the Corporation. The President/CEO shall keep a record of the proceedings of the Board of Directors and is the custodian of all books, documents, and papers filed with the Board of Directors, the minutes of the meetings, and all board membership records, and exhibit such records to any director of the Corporation, or to his agent, or to any person or agency authorized by law to inspect them, at all reasonable times and on demand.

The President/CEO shall coordinate with the CLEOs regarding the identification and nomination of Board members to the LWDB and ensuring membership is compliant with WIOA and Florida Statutes;

The President/CEO shall organize board meetings and ensure meetings are held in accordance with the LWDB's bylaws and Florida's sunshine laws;

The President/CEO shall coordinate with the Board of Directors and CLEOs, in developing and submitting the local and regional workforce development plan;

The President/CEO shall negotiate and reach an agreement on local performance measures with the CLEOs and the state;

The President/CEO shall certify the one-stop career centers.

The President/CEO shall ensure the outcomes of local performance measures are provided to the LWDB members and CLEO no less than semi-annually. The President/CEO shall negotiate with CLEO and required partners for the Memorandum of Understanding as prescribed in Administrative Policy 106-Memorandums of Understanding and Infrastructure Funding Agreements.

The President/CEO shall provide oversight of the competitive procurement process for procuring or awarding contracts for providers of youth program services, providers of workforce services (if applicable), and the one-stop operator as required in paragraph (i) of 20 CFR 679.370;

The President/CEO shall provide copies of all monitoring and audit reports and related materials to the LWDB members, LWDB chairperson, and CLEO within five business days of receipt.

- B. Chair. The Chair shall be elected from among the members of the Board who are representatives of the private business sector and shall have been a member of the Board for at least one (1) year prior to taking office. The Chair may serve for a term of no more than two years, with service limited to two consecutive terms.

The Chair shall appoint Committee Chairs for all Committees from members of the Board. The Chair may serve on all Committees and shall perform such other duties as set forth in the Bylaws or as determined by the Board.

The Chair shall lead the board to develop a strategic plan that aligns with the state's priorities;

The Chair shall act as the lead strategic convener to promote and broker effective relationships between CLEOs and economic development, education, and workforce partners in the local area;

The Chair shall lead an executive committee to guide the work of the board, and ensure that committees or task forces have necessary leadership and membership to perform the work of the board; and

The Chair shall lead the agenda setting process for the year and guide meetings to ensure both tactical and strategic work is completed in all meetings.

The Chair shall appoint members to the Education and Industry Consortium;

The Chair shall provide the annual performance review of the President/CEO to the CLEO(s) and at least once annually to the Board of Directors, and upon request of the LWDB; and

The Chair shall, upon the request of the state board, appear before the state workforce development board (state board) to discuss the performance of the LWDB.

- C. Chair-Elect. The Chair-Elect shall be elected from among the members of the Board who are representatives of the private business sector and shall have been a member of the Board for at least one (1) year prior to taking office, and shall, in the absence of the Chair or in the event of the Chair's inability, perform the duties of the Chair and shall perform such other duties as are assigned by the Chair.
- D. Treasurer. The Treasurer shall serve on the Executive Committee. The Treasurer is responsible to the Board for oversight of the Corporation's financial management system.

Section 5.3. Officer Nominating Committee. The Nominating Committee shall be appointed by the Chair. The Nominating Committee shall accept recommendations from the Board in assembling a slate of officers. The Nominating Committee will recommend to the full Board a slate of officers to serve on the Executive Committee.

Section 5.4. Elections. Officers shall be elected on two-year cycles. The Nominating Committee will provide the recommended slate of officers to be voted and approved by majority vote of full Board of Directors, when a quorum is established. The confirmed slate of Officers will be installed at the annual Board meeting held in September.

Officers shall serve a two-year term commencing the day of the installation at the annual meeting and ending upon the installation of a replacement at the annual meeting of the Board. The terms of the officers are limited to two (2) consecutive two-year terms in the same office. There are no limitations on the number of terms, not in sequences or in different offices.

Section 5.5. Removal. The Board of Directors may recommend to the Chief Local Elected Officials the removal of any officer when it is deemed in the best interest of the Corporation.

ARTICLE VI – COMMITTEES

Section 6.1. Executive Committee.

- A. The Executive Committee shall be composed of the Chair, Chair-Elect, Treasurer, Chairs of all Committees, and at-large Board member, with the Past Chair having the choice of serving on the Executive Committee. At least a majority of the members of the Executive Committee shall be representatives of the private business sector. The Executive Committee is empowered to act and take necessary interim action between meetings of the Board.
- B. The Executive Committee and the President/CEO shall have such additional authority as the Board of Directors lawfully delegates to it.
- C. The Executive Committee shall assist the Treasurer with financial and performance review responsibilities and shall review the President/CEO's recommended budget and make recommendations regarding the budget to the Board. The annual audit will be reviewed by the Executive Committee when the audit report is completed.

Section 6.2. Standing Committees. The Chair may appoint committees to fulfill the Boards' responsibilities to obtain technical assistance. The Board Chair shall name a Committee Chair for each Committee from among the members of the Committee who are also members of the Board of Directors. Each Committee may meet at the call of its Chair or at the direction of the Board of Directors but shall meet at least quarterly. Standing Committees must include non-Board members, but the Chair and Vice Chair of all Committees shall be members of the Board.

Non-Board member committee members must apply for committee membership and be appointed by the Board Chair.

Section 6.3. Ad hoc Committees. Ad hoc Committees may be created and established by the Board of Directors. The scope and function, including any budget allocation, shall be established by the Board. Any special committee created by the Board of Directors shall automatically be abolished one (1) year after its creation unless the need for its continued existence is justified to the satisfaction of the Board of Directors. Ad- Hoc Committees may include non-Board members, but the Chair and Vice Chair of all Committees shall be members of the Board. The Board Chair will appoint committee members.

Section 6.4. Compliance with Sunshine Law. All Committee meetings shall be noticed and conducted in compliance with the requirements of the Florida Government in the Sunshine Law, Section 286.011, Florida Statutes.

ARTICLE VII – OPERATIONS

Section 7.1. Fiscal Year. The fiscal year of the Corporation shall be July 1st through June 30th of the following calendar year.

Section 7.2. Execution of Documents. The President/CEO or their designee shall have the authority to enter into contracts as the Board or Executive Committee may approve from time to time, or as approved by the Board or Executive Committee through the enactment of policies pertaining to matters of procurement and program delivery.

Section 7.3. Books and Records. The Corporation shall keep correct and complete books and records of account and shall keep minutes on the proceedings of the Board of Directors. The Corporation shall keep at its principal place of business a membership register listing the names, addresses and other details of each Board of Directors' member, and the original or a copy of its Bylaws, including amendments to date.

Section 7.4. Inspection of Books and Records. All books and records of the Corporation shall be public records subject to inspection and copying as provided for in Chapter 119, Florida Statutes, as amended from time to time.

Section 7.5. Contracts. The Corporation shall have the authority to contract with public and private entities as necessary to further the purposes of the Corporation. All contracts executed by the Corporation must include specific performance expectations and deliverables.

Section 7.6. Budget. The Board of Directors of this Corporation shall adopt for each fiscal year a budget for the organization in accordance with the requirements of law. A budget shall be prepared annually prior to the commencement of the fiscal year. The President/CEO shall be responsible for preparation of the budget. The President/CEO will present the budget for review by the Executive Committee and

approval by the Board of Directors. Allocation and expenditure of the funds of the Corporation shall be governed by the budget previously approved for the current fiscal year. The budget may be amended from time to time by the Board of Directors.

Section 7.7. Gifts and Contributions. The Board of Directors is authorized to accept on behalf of the Corporation any contribution, gift, bequest, or devise of any property whatsoever, for the general and special purposes of this Corporation. The Board of Directors may from time to time on behalf of the Corporation accept gifts of money or securities upon such terms as they shall approve, and may hold such cash or securities in the name of the Corporation or of such nominee or nominees as the Board of Directors may appoint, and may collect and receive the income thereof and devote the principal or income of such gifts to such purposes within the scope of the activities of the Corporation as the Board of Directors may determine.

The Board of Directors may enter into an agreement with any donor to continue to devote the principal or income of his gift to such particular purpose as the donor may designate, provided that such purpose is duly approved or ratified by resolution of the Board of Directors; and after such agreement, the principal or income of that particular gift shall be devoted in accordance with such agreement for the time specified therein.

Section 7.8. Deposits. All funds of the Corporation shall be deposited from time to time to the credit of the Corporation in such banks, trust companies, or other depositories as the Board of Directors may select.

ARTICLE VIII – AMENDMENT

Section 8.1. Amendment. The Bylaws may be altered, amended, or repealed and new Bylaws adopted by the affirmative vote of a majority of the full membership of the Board at a regular or special meeting, provided that any proposal to alter, amend or repeal Bylaws be submitted to each Board member at least fifteen (15) days prior to the meeting at which the proposal is to be considered.

ARTICLE IX – PROHIBITION AGAINST SHARING IN CORPORATE EARNINGS

Section 9.1. Prohibition Against Sharing in Corporate Earnings. No member, director, officer, or employee of or member of a Committee of or person connected with the Corporation, or any other private individual shall receive at any time any of the net earnings or pecuniary profit from the operations of the Corporation, provided that this shall not prevent the payment to any such person of such reasonable compensation for services rendered to or for the Corporation in effecting any of its purposes as shall be fixed by the Board of Directors; and no such person or persons shall be entitled to share in the distribution of any of the Corporate assets upon the

dissolution of the Corporation. All members of the Corporation shall be deemed to have expressly consented and agreed that upon such dissolution or winding up of the affairs of the Corporation, whether voluntary or involuntary, the assets of the Corporation, after all debts have been satisfied, remaining in the hands of the Board of Directors shall be distributed within the intentment of Section 501(c) of the Internal Revenue code of 1954 and its Regulations as they now exist or as they may be amended, and consistent with other applicable law.

ARTICLE X – EXEMPT ACTIVITIES

Section 10.1. Exempt Activities. Notwithstanding any other provision of these Bylaws or the Articles of Incorporation, no member, director, officer, employee, or representative of this Corporation shall take any action or carry on any activity by or on behalf of the Corporation not permitted to be taken or carried on by an organization exempt under Section 501(c) of the Internal Revenue Code of 1954 and its Regulations as they now exist or as they may be amended.

ARTICLE XI – DISSOLUTION OF CORPORATION

Section 11.1. Dissolution. In the event of the liquidation or dissolution of the Corporation, whether voluntary or involuntary, no member shall be entitled to any distribution or division of its remaining property or its proceeds, and the balance of all money and other property received by the Corporation from any source, after the payment of all debts and obligations of the Corporation, shall be used or distributed to the State of Florida within the intentment of Section 501(c) of the Internal Revenue Code of 1954 and the Regulations thereunder.

ARTICLE XII – NON-DISCRIMINATION POLICY

Section 12.1 The members, Officers, Directors, committee members, employees, and persons served by this Corporation shall be interviewed, selected, appointed, and promoted without regard to race, color, religion, sex, national origin, age, disability, handicap, marital status, sexual orientation, or status as a veteran except as provided for in applicable federal and/or state legislation.

ARTICLE XIII – HARASSMENT POLICY

Section 13.1 It is the policy of the Corporation to strive for an environment that is free from all forms of Harassment based upon a protected category. Harassment based upon any of the categories found in Article XII, or found in any federal, state, or local law, in any manner or form is expressly prohibited. Any concerns and complaints should be brought to the attention of the Board Chair, or the President/CEO. CareerSource Suncoast also has a Whistleblower Policy with an Integrity Hotline posted on the CSS Website, which goes to the attention of the Board Chair.

WE HEREBY CERTIFY that these Bylaws have been adopted by the Board of Directors of the Suncoast Workforce Board, Inc., dba CareerSource Suncoast on the _____ day of _____, 2026, by the requisite affirmative vote of a majority of the full membership of the Board pursuant to the prior Bylaws.

David Kraft, Chair of the Board of Directors

Date: _____

Joshua Matlock, President/CEO/Executive Secretary to the Board of Directors

Date: _____

CHIEF LOCAL ELECTED OFFICIALS:

Manatee County Commissioner

Name: Tal Siddique

Signature: _____

Date: _____

Sarasota County Commissioner

Name: Teresa Mast

Signature: _____

Date: _____

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OTHER BOARD BUSINESS



CareerSource Suncoast
Board of Directors
Annual Refresher Training
March 12, 2026

Welcome!

- Facilitators: CSS Leadership Team
 - Florida's Sunshine Law Requirements
 - Ethics and Transparency
 - Reach Act
 - The Purpose of the LWDB
 - Florida's Workforce Development Goals and Strategies
 - Roles and Responsibilities
 - How the Workforce System is Funded
 - Performance Requirements



Florida's Sunshine Law Requirement and Code of Ethics



GRAY ROBINSON
ATTORNEYS | ADVISORS | CONSULTANTS

George Levesque, Shareholder

GRAYROBINSON

Government in the Sunshine – Public Records and Open Government Laws
and the Code of Ethics
March 12, 2026

Presented by

George Levesque

Shareholder, GrayRobinson

SUNSHINE AND OPEN GOVERNMENT

The Public Records Law and Sunshine Law is designed to ensure public access to the decision-making process of public boards and commissions and expressly applies to CareerSource Florida and local workforce development boards like CareerSource Suncoast.

*See § 445.004(1), Florida Statutes –
CareerSource Florida*

*See § 445.007(1), Florida Statutes –
CareerSource Suncoast*

THE SUNSHINE LAW

THE SUNSHINE LAW

- Basic requirements:
 - Meetings of public boards or commissions must be open to the public.
 - Reasonable notice of such meetings must be given.
 - Minutes of the meetings must be taken.
 - The public must be given a reasonable opportunity to be heard on a proposition that comes before the Board.

WHAT IS A MEETING?

- Any formal or informal gathering of two or more members of the same board to discuss some matter which will foreseeably come before that board for action.
- A writing reflecting the views of a board member is circulated among board members, with each indicating their approval or disapproval. Upon completion of the circulation, the writing has the effect of becoming an official action of the board.
- A telephone conversation among two or more board members.
- Communication via computer or any electronic device among two or more board members.

WHAT IS OPEN TO THE PUBLIC?

- CareerSource should take reasonable steps to ensure that the facilities where the meeting will be held will accommodate the anticipated turnout.
- Board members should not discuss issues before the board in a manner not generally audible to the public attending the meeting.
- The public has a right to be present and heard at deliberations where decisions affecting the public are being made.

CONSEQUENCES FOR FAILURE TO COMPLY WITH THE SUNSHINE LAW

- Any action taken at a meeting that is not open to the public, whether intentional or unintentional, can be voided by a court.
- Civil fines up to \$500 for each violation.
- Criminal penalties for knowing violations.
- Possible removal from office.
- Award of reasonable attorney's fees against the entity found to have violated the Sunshine Law.

PUBLIC RECORDS

Florida provides a broad right of access to public records.

SOURCE OF THE RIGHT OF ACCESS

Florida Constitution, Article I, Section 24

Every person has the right to inspect or copy any public record made or received in connection with the official business of any public body, officer, or employee of the state or persons acting on their behalf, except with respect to records exempted pursuant to this section or specifically made confidential by this Constitution.

Florida Statutes Section 119, Public Records

It is the policy of this state that all state, county, and municipal records are open for personal inspection and copying by any person. Providing access to public records is a duty of each agency.

PUBLIC RECORDS DEFINED

- Florida Statutes Section 119.011(12) states:

'Public records' means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.

- Florida Supreme Court's interpretation from *Shevin v. Byron, Harless, Schaffer, Reid and Associates, Inc.*, 379 So. 2d 633, 640 (Fla. 1980):

All materials that have been prepared with the intent of perpetuating or formalizing knowledge

FORMS OF PUBLIC RECORDS

- All public records must be open for public inspection, regardless of whether they are in final form, unless the Legislature has exempted them from disclosure (exemptions are beyond the scope of this presentation).
- “[T]he form of the record is irrelevant; the material issue is whether the record is made or received by the public agency in connection with the transaction of official business.” Op. Att’y Gen. Fla. 04-33 (2004); Op. Att’y Gen. Fla. 03-26 (2003); Op. Att’y Gen. Fla. 90-102 (1990).
- Any agency document or record, however prepared, if circulated for review, comment, or information, is a public record regardless of whether it is an official expression of policy or marked “preliminary” or “working draft” or similar label.

FORMS OF PUBLIC RECORDS

- Includes interoffice memoranda, preliminary drafts of agency rules or proposals that have been submitted for review to anyone within or outside the agency and working drafts of reports that have been furnished to a supervisor for review or approval.

- Examples of public records subject to the public records law absent an exception:
 - Computer records, including potentially browser history
 - Email & text messages
 - Social media posts and messages
 - Financial records (including bids, budgets, and personal financial records)
 - Litigation records
 - Personnel records

- **NOT PUBLIC RECORDS:** generally, personal communications or information related to any of the above

PUBLIC RECORDS REQUEST- WHAT TO DO IF YOU GET ONE

- Please share the request with Christina Witt, Organizational Support Director.
- A member of the communications team will notify the requestor that their request has been received.
- Staff will work to determine if the record(s) exist in a timely manner.
- The communications team will prepare a response, reviewed by the appropriate leadership team member, and provide it to the responder in a timely manner.
- A copy of the response will be provided to the Florida Department of Commerce.

CONSEQUENCES FOR VIOLATION OF PUBLIC RECORDS LAW

- Non-criminal infraction punishable by a fine of up to \$500.
- A willful and knowing violation is a first-degree misdemeanor (imprisonment up to one year and a fine of up to \$1,000).
- removal from office.
- Award of reasonable attorney's fees against the agency if found to unlawfully refuse inspection and copying of a public record.

ETHICS LAWS

ETHICS LAWS

- Generally, consists of two types of provisions:
 - Prohibiting certain actions or conduct.
 - Requiring certain disclosures.

APPLICABLE TO "PUBLIC OFFICERS"

Defined as "... any person elected or appointed to hold office in an agency, including any person serving on an advisory body."

§ 112.313(1), Florida Statutes

INCLUDES

- Standards of Conduct - § 112.313, Florida Statutes
- Financial Reporting - §§ 445.004(4)(i) and 112.3145, Florida Statutes
- Financial Reporting - §§ 445.007(1) and 112.3145, Florida Statutes
- Gift Law and Lobbying Expenditure Ban - § 112.3148, Florida Statutes.

ETHICS LAWS

- Prohibited Actions or Conduct
 - Solicitation or Acceptance of Gifts
 - Cannot solicit or accept anything of value in exchange with the understanding of influence over a vote - § 112.313(2), Florida Statutes
 - Cannot solicit and cannot accept anything over \$100 from a lobbyist or a principal § 112.3148(3) and (4), Florida Statutes
 - Must report anything of value over \$100 from anyone who is not family (broad definition) or someone that you intend to marry - § 112.3148(8), Florida Statutes
- Prohibited Employment - § 112.313(3), Florida Statutes
- Unauthorized Compensation
 - For self, spouse or minor children - § 112.313(4), Florida Statutes
- Misuse of Public Position - § 112.313(6), Florida Statutes
- Disclosure or Use of Information - § 112.313(8), Florida Statutes

VOTING CONFLICTS OF INTEREST

If you are present at the meeting, you must vote on the official actions being taken.

§ 286.012, Florida Statutes

Exception

If there is a possible conflict of interest, you must abstain and comply with disclosure requirements of § 112.3143, Florida Statutes.

- Conflict - inure to your own special private gain or loss or the special private gain or loss of any principal (including parent or subsidiary of a principal), business associate, or relative.
- Relative - father, mother, son, daughter, husband, wife, brother, sister, father-in-law, mother-in-law, son-in-law, or daughter-in-law.

CONSEQUENCES FOR FAILURE TO COMPLY WITH THE ETHICS LAW

- Reputational damage.
- Civil penalties.
- Criminal penalties.
- Removal from office.

The background features a large, semi-transparent watermark of the GrayRobinson logo, which consists of a stylized 'G' and 'R' intertwined. The logo is centered behind the main text.

GRAYROBINSON

Thank you

George T. Levesque
Shareholder

george.levesque@gray-robinson.com

850.577.6969

This presentation is for the general education of our audience, and should not be your sole source of information in handling a legal issue, nor should you substitute it for legal advice, which relies on specific factual analysis and the laws of the relevant jurisdictions. Also, this presentation is not intended to create, nor does its receipt constitute, an attorney-client relationship. If you have specific questions, consult your GrayRobinson representative or other competent legal counsel.



- Conflict of Interest Policy # 06-21
- Purchasing and Procurement Policy #02-21
- CareerSource Florida LWDB Conflict of Interest and Contracting Policy #G125

Ethics & Transparency - Conflict of Interest



- Annual Form1 Filing
 - Failure to file on time will result in daily fines.
- Purchasing and Procurement Policy #02-21

Ethics & Transparency -
Statement of Financial Interest

Reach Act and Senate Bill 240

- Passed and signed into law in 2021.
- Amended in 2023
 - Expanded work-based learning
 - Career & Technical Education
- Alignment and Consolidation
 - In 2024 LWDB's were reduced from 24 to 21.
- System Wide Improvements
 - Streamline the experience of employers and jobseekers.
- Regional Planning



Reach Act - Letter Grade



Local Board Performance



CareerSource Suncoast Program Year 2024-2025 Grade

A
Letter Grade

94.43%
Annual Score

Metrics Data

The table below shows the data used in the letter grade calculation. Visit the [Methodology](#) page of this website for more information on each metric including numerator and denominator definitions. Visit the [Resources](#) page to view or download a methodology desk reference document, metric cohort timeline spreadsheet and lists of the Employment Florida service codes included in the metrics.

Data as of: 6/30/2025

Metric	Metric Category	Weight	Numerator	Denominator	Rate (%)	YOY Rate Difference	Target (%)	Target Met ¹ (%)	Weighted Performance ² (%)
1. Participants with Increased Earnings	Employment and Training Services, Self-Sufficiency	0.25	568	1,267	44.83	-	50.00	89.66	22.4150
2. Reduction in Public Assistance	Employment and Training Services, Self-Sufficiency	0.25	480	983	48.83	-	50.00	97.66	24.4150
3. Employment and Training Outcomes	Employment and Training Services	0.20	16	18	88.89	-	100.00	88.89	17.7780
4. Participants in Work-Related Training	Training Services	0.00	504	2,350	23.44	-	25.00	93.76	9.3760
5. Continued Repeat Business	Business Services	0.05	2,092	4,093	51.11	-	35.00	100.00	5.0000
6. Year-Over-Year Business Penetration	Business Services	0.05	-	-	-	16.84	100.00	100.00	5.0000
PY 2023-2024 Business Penetration		-	2,682	14,239	18.84	-	-	-	-
PY 2024-2025 Business Penetration		-	5,382	14,527	35.68	-	-	-	-
7. Completion-to-Funding Ratio	Employment and Training Services	0.00	1.53	2.81	54.45	-	100.00	54.45	5.4500
Extra: Local Board (N) / Statewide (D)		-	1,003	7,187	15.3	-	-	-	-
Budget: Local Board (N) / Statewide (D)		-	\$4,043,167	\$43,729,734	2.81	-	-	-	-
Extra Credit: Serving Individuals on Public Assistance	Employment and Training Services, Self-Sufficiency	Up to 0.05 points	1,443.50	2,387	60.47	-	-	-	5
								ANNUAL SCORE	94.43

Florida's Local Workforce Development Board's Purpose

- Enhance the Capacity of the System
- Align and Improve Program Outcomes
- Promote Economic Growth
- Engage Business and other Stakeholders
- Support achievement of the State's Vision and Goals



Florida's Workforce Development Goals



- Integrated Service Delivery
- Strategy
- Regional Economic Development
- High-Quality Services
- Accountability and Transparency

CareerSource Florida Workforce Strategies

- CSF Strategic Plan
 - Objectives:
 - Implementing Sector Strategies
 - Career Pathways
 - Expanding Apprenticeship Opportunities
 - Enhancing Performance Measurement
 - Quality Services for People with Disabilities



CareerSource Suncoast Strategic Plan

- **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
- **Goals**
 - Enhance offerings to focus on increasing access by employers
 - Develop a plan to invest unrestricted funds in growing best practice employer programs
 - Develop a plan to invest unrestricted funds in growing best practice employer programs



Chief Elected Officials Roles and Responsibilities



Determine Shared Financial Liability



Designate a Grant Subrecipient or Fiscal Agent



Appoint Local Board Members



Bylaws and Interlocal Agreements



Review and Approve:

- WIOA Budgets
- Mandated partner MOU's/IFA's
- One Stop Operator Selection



CareerSource Suncoast Board of Directors Chair

- Elected by the Members of the Board
- Private Business Sector
- Roles and responsibilities
 - Directed by CSS Bylaws



CareerSource Suncoast President/Chief Executive Officer

- Hired by the Board of Directors
- Roles and Responsibilities
 - Directed by CSS Bylaws



CareerSource Suncoast Staff Roles and Responsibilities



- Fiscal and Administrative Agent
- Assist Job Seekers
- Connect Employers with Skilled workers
- Coordination of Services with Partners and Stakeholders

CareerSource Suncoast Board Roles And Responsibilities



Convener

Convene partners and other stakeholders to identify and achieve shared goals



Strategist

Develop strategies to meet the needs of the jobseekers and employers



Manager

Board provides overall Management of the workforce system



Optimizer

Works to achieve maximum results in the local area

Workforce System Funding

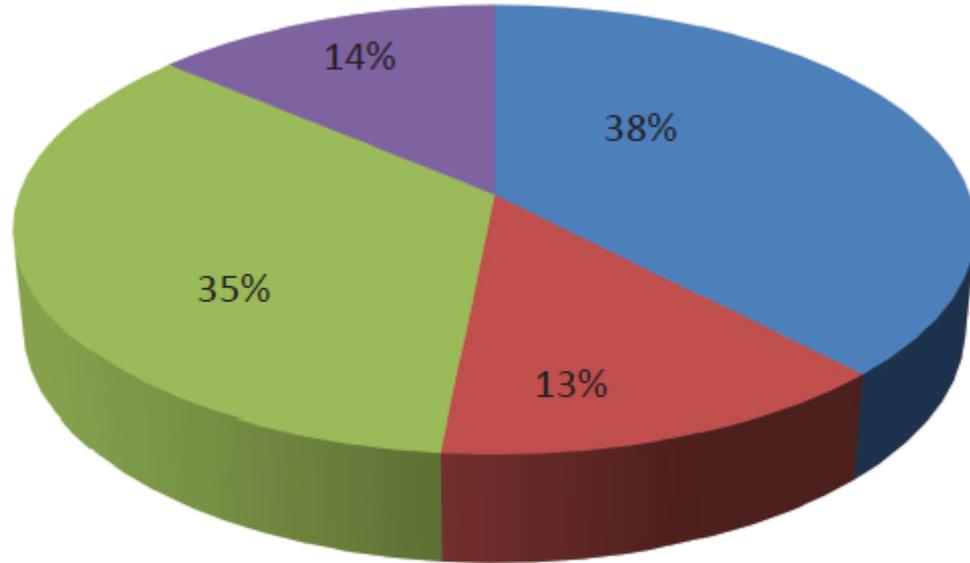
U.S. Department of Labor

U.S. Department of
Agriculture

U.S. Dept. of Health and
Human Services



Funds Available by Program



■ WIOA-ADULT, DIS WKR & YOUTH ■ TANF ■ SPECIAL GRANTS ■ WP, RESEA, SNAP, VET

Workforce System Funding





Budget to Expenditure Report
 By Fundsource
 PY 24-25
 7/1/2024 - 06/30/2025

Revenue:	Annual Budget	WIOA	WIOA	WIOA	WIOA	WP	WP	NEG Opioid			NEG			WP			Helene/		
		TANF	AD/Dis Wkr	Youth	Rap Resp	Hope FL PW	Hope FL PW	Hope Nav	SBTI	Foster Rec	Hurr Ian	WP	App Nav	SNAP	RESEA	NCPEP	Rap Cred	Milton	Others
Carry Forward Funds from PY 23-24	\$2,140,510	\$216,318	\$246,130	\$371,311	\$0	\$93,329	\$28,168	\$0	\$0	\$43,444	\$402,531	\$28,814	\$0	\$0	\$190,819	\$97,368	\$408,936	\$0	\$13,343
Allocation Awards PY 24-25	\$6,726,847	\$1,301,951	\$1,786,338	\$641,488	\$87,318	\$0	\$0	\$71,429	\$100,000	\$225,000	\$515,000	\$593,620	\$80,000	\$59,490	\$167,710	\$651,599	\$0	\$363,000	\$82,904
Total Available Funding	\$8,867,357	\$1,518,269	\$2,032,468	\$1,012,799	\$87,318	\$93,329	\$28,168	\$71,429	\$100,000	\$268,444	\$917,531	\$622,434	\$80,000	\$59,490	\$358,529	\$748,967	\$408,936	\$363,000	\$96,247
LESS: Planned Carry Fwd (Reserve) PY 25-26	(\$598,211)	\$0	(\$166,929)	(\$179,836)	\$0	\$0	\$0	\$0	\$0	(\$146,062)	(\$22,000)	(\$20,000)	\$0	(\$13,071)	(\$50,313)	\$0	\$0	\$0	\$0
Total Revenue Budgeted PY 24-25 Mod #2	\$8,269,146	\$1,518,269	\$1,865,539	\$832,963	\$87,318	\$93,329	\$28,168	\$71,429	\$100,000	\$122,382	\$895,531	\$602,434	\$80,000	\$46,419	\$308,216	\$748,967	\$408,936	\$363,000	\$96,247

Budgeted Mod #2 Expenditures:	Expenditures To Date:																			Total Expenditures	% of Budget
Salaries & Benefits	\$4,500,994	\$923,854	\$1,040,117	\$435,459	\$76,036	\$80,533	\$27,188	\$68,633	\$6,421	\$37,102	\$152,825	\$275,487	\$75,334	\$43,645	\$255,258	\$334,544	\$144,105	\$68,817	\$44,299	\$4,089,658	90.9%
Staff Training & Education	\$37,953	\$8,541	\$8,271	\$3,976	\$618	\$376	\$208	\$584	\$22	\$121	\$1,031	\$6,721	\$450	\$376	\$2,021	\$2,463	\$1,063	\$257	\$2,000	\$39,098	103.0%
Facility Costs	\$506,769	\$87,766	\$79,097	\$39,437	\$7,780	\$150	\$81	\$1,400	\$120	\$1,490	\$34,802	\$121,788	\$2,380	\$4,290	\$20,110	\$29,415	\$15,070	\$5,707	\$23,525	\$474,407	93.6%
Furniture & Equipment	\$15,000	\$4,760	\$457	\$4,339	\$10	\$0	\$0	\$0	\$0	\$14	\$24	\$8,108	\$0	\$26	\$135	\$129	\$62	\$24	\$110	\$18,200	121.3%
Operating Costs	\$288,052	\$48,337	\$50,150	\$20,330	\$2,786	\$1,176	\$671	\$825	\$770	\$1,087	\$12,198	\$35,506	\$1,826	\$8,042	\$7,096	\$13,049	\$6,943	\$1,758	\$11,596	\$224,147	77.8%
Program Services	\$2,920,378	\$344,714	\$452,766	\$266,656	\$74	\$2,385	\$14	-\$26	\$84,530	\$62,387	\$408,636	\$36,814	-\$3	\$7,951	\$1	\$211,966	\$202,927	\$178,931	\$650	\$2,261,373	77.4%
Total Expenditures	\$8,269,146	\$1,417,972	\$1,630,859	\$770,198	\$87,303	\$84,620	\$28,163	\$71,416	\$91,863	\$102,200	\$609,517	\$484,424	\$79,986	\$64,329	\$284,621	\$591,566	\$370,170	\$255,494	\$82,180	\$7,106,882	85.9%
Remaining Available Funds		\$100,297	\$234,680	\$62,765	\$15	\$8,709	\$5	\$12	\$8,137	\$20,183	\$286,014	\$118,010	\$14	-\$17,910	\$23,595	\$157,401	\$38,766	\$107,506	\$14,067	\$1,162,264	
% of Funds Expended by Grant		93.4%	87.4%	92.5%	100.0%	90.7%	100.0%	100.0%	91.9%	83.5%	68.1%	80.4%	100.0%	138.6%	92.3%	79.0%	90.5%	70.4%	85.4%	85.9%	
Expiration Dates		8/31/2025	6/30/2026	6/30/2026	6/30/2025	8/31/2025	6/30/2025	6/30/2025	9/30/2025	12/31/2026	9/30/2025	9/30/2025	6/30/2025	9/30/2025	9/30/2025	8/31/2025	10/31/2025	9/30/26	9/30/2025		

inc rec'd Jun
 leaving \$13k
 avail 7/1

WIOA Adult/Dislocated Worker Performance Requirements

- Credential Attainment
- Measurable Skills Gain
- Median Earnings- Second Quarter after Exit
- Employment Rate
 - Second Quarter after exit
 - Fourth Quarter after exit



WIOA Youth Performance Requirements

- Credential Attainment
- Measurable Skills Gain
- Median Earnings- Second Quarter after Exit
- Education and Employment Rate
 - Second Quarter after exit
 - Fourth Quarter after exit



Wagner-Peyser Performance Requirements

- Median Earnings- Second Quarter after Exit
- Education and Employment Rate
 - Second Quarter after exit
 - Fourth Quarter after exit



Employer-Based Performance

- Effectiveness of Serving Employers
 - Retention with the same employer during the 2nd and 4th Quarter after Exit.



Quarterly Performance Reports

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)



Questions?



Thank You!

Question or Comments

Email: cwitt@careersourcesc.com



FINANCE
AND
PERFORMANCE
COMMITTEE
REPORT

CAREERSOURCE SUNCOAST
Finance & Performance Committee
Board of Directors and Executive Committee Summary
March 12, 2026

The Finance & Performance Committee on March 5, 2026.

Request to Transfer of Funds from Dislocated Worker to Adult PY 2025-2026

Robin Dawson reviewed the request to transfer Dislocated Worker funds to Adult. The Committee approved the transfer to go before the Full Board of Directors and Executive Committee on March 12, 2026.

- Dislocated Worker Total Award: \$833,358
- Transfer Amount to Adult: \$450,000
- Total Percentage of Dislocated Worker Transfer to Adult: 54%

Budget Modification #2 for PY2025-2026

The Summary of Funds Available and Budget Modification #2 reports were included in the meeting packet. The Committee recommended the modification to go before the Full Board of Directors and Executive Committee on March 12, 2026. Below is a summary of the modification:

- PY25-26 Modification #1 Funding Available: \$9,111,105
- Increase in Funding: \$50,000
- Adjusted Funding Available: \$9,161,105
- Less Reserve for PY 24-25: \$489,789
- Budget Modification #1 Funding Available \$8,671,316

Budget line items requested for an increase in Budget for PY 25-26 total \$50,000:

- Add \$2,350 Personnel Costs
- Add \$47,650 Program Services

Review of Budget to Expenditure Report PY 25-26 as of December 31, 2025:

A copy of the report was included in the meeting materials. This report covers the period July 1, 2025 – December 31, 2025, for PY 25-26. The overall burn rate as of December 31, 2025, was 46%. Budget to Expenditure Report by Fundsourcse was also shared with the committee.

State and federal expenditure requirements reported as of December 31, 2025:

- Admin expenditure rate – 8.64%; max allowed 10%.
- Individual training accounts (ITAs) – 44.56%; min requirement 40%
- Youth paid internships PY24 – 34.02%; PY25 – 36.18%; min. requirement 20%.
- Youth out of school expenditures PY24 97.75% - PY25 100.00% min. requirement 50%.

Review of Non-Federal Funds Revenue & Expenditures as of December 31, 2025:

Balance of Non-Federal Funds \$884,301.50

WIOA Performance Indicators

Anthony Gagliano reviewed the WIOA Performance Indicators for the second quarter of PY2025-2026. CSS is exceeding performance in thirteen metrics, meeting performance in four metrics, and not meeting in one metric. CareerSource Florida Letter grades were released for the first quarter of PY 2025-2026, CSS is currently at a 91.22% A- grade.

CAREERSOURCE SUNCOAST
Finance & Performance Committee
Board of Directors and Executive Committee Summary
March 12, 2026

Review of FloridaCommerce Preliminary Monitoring Report:

Anthony Gagliano reviewed the FloridaCommerce Preliminary Monitoring Report for PY2025-2026. The review period for the monitoring was January 1, 2025, through December 31, 2025. The preliminary report shows seven findings and fourteen observations of non-compliance issues. This is a significant decrease from previous years. PY 2024-2025 had fourteen findings and twelve observations.

Respectfully Submitted,

Jim Bos
CSS Treasurer



FINANCE REPORTS

CareerSource Suncoast
 Expenditure To Budget Report - Summary
 Program Year July 1, 2025 thru June 30, 2026
 As Of 12/31/2025 (with accruals)

	PY TOTAL BUDGET MOD #1	RESTRICTED EXPENSES YTD	BUDGET BALANCE	% OF BUDGET EXPENDED	NOTES
PERSONNEL COSTS					
SALARIESFRINGE BENEFITS	\$4,510,508	\$2,190,117	\$2,320,391	49%	
STAFF TRAINING & EDU	\$38,919	\$29,383	\$9,536	75%	Staff development/trng fr Summit and general trng is during Qtr 1 & 2
TOTAL PERSONNEL COSTS	\$4,549,427	\$2,219,500	\$2,329,927	49%	
FACILITY COSTS	\$512,000	\$241,217	\$270,783	47%	
EQUIP & FURNITURE	\$35,947	\$23,357	\$12,590	65%	
OPERATING COSTS:					
ACCOUNTING/AUDIT	\$87,032	\$47,562	\$39,470	55%	James Moore Audit Engagement Oblig \$7,500
CONSULTANTS/LEGAL	\$53,500	\$25,652	\$27,848	48%	OSO Contract Oblig \$20,417
GENERAL INSURANCE	\$58,836	\$51,005	\$7,831	87%	Policies begin July 1
OFFICE SUPP & EXP	\$31,609	\$9,811	\$21,798	31%	
TRAVEL & MEETINGS	\$73,000	\$34,153	\$38,847	47%	
TOTAL OPERATING COSTS	\$303,977	\$168,183	\$135,794	55%	
PROGRAM SERVICES:					
CLIENT TRAINING/SUPPORT	\$3,043,759	\$1,207,605	\$1,836,154	40%	Oblig \$1,416,313 / actual exp & oblig 86%
EMPLOYER & CLIENT SERVICES	\$41,800	\$40,875	\$925	98%	
OUTREACH	\$134,406	\$32,414	\$101,992	24%	EDCs oblig \$28,333 & LCANs oblig \$35k
TOTAL PROGRAM SERVICES	\$3,219,965	\$1,280,895	\$1,939,070	40%	
TOTALS	\$8,621,316	\$3,933,153	\$4,688,163	46%	Rates below as of 12/2025: Overall Admin 8.64% - Max 10% Fiscal Year: ITA 44.56%. Min Req 40% LTD: Paid Internships Exp: PY24 34.02% - PY25 36.18%, Min Req 20% Out of Sch Exp: PY24 97.75% - PY25 100.00% Min Req 50%. Yth
				Expected burn rate as of 12/31/25	50%



**By Fundsource
PY25-26
7/01/2025-12/31/2025**

Revenue:	Annual Budget Mod #1	NEG																		Sector Strat	Network Nav	State Init	Rural Vet
		TANF	WIOA AD/Dis Wrk	WIOA Youth	WIOA Rap Resp	WIOA Hope FL PW	SBTI	NEG Opioid Foster Rec	NEG Hurricane IAN	WP	SNAP	RESEA	NCEP	Rap Cred	Helene/Milton								
Carry Forward Funds from PY 24-25	\$2,994,973	\$100,056	\$372,086	\$242,487	\$0	\$0	\$0	\$166,069	\$241,000	\$161,595	\$0	\$0	\$101,062	\$0	\$1,504,670	\$0	\$0	\$0	\$105,948				
Allocation Awards PY 25-26	\$6,116,132	\$1,089,534	\$1,875,199	\$719,270	\$90,000	\$8,694	\$8,122	\$0	\$0	\$612,020	\$80,617	\$194,793	\$940,609	\$38,703	\$0	\$145,000	\$163,571	\$150,000	\$0				
Total Available Funding	\$9,111,105	\$1,189,590	\$2,247,285	\$961,757	\$90,000	\$8,694	\$8,122	\$166,069	\$241,000	\$773,615	\$80,617	\$194,793	\$1,041,671	\$38,703	\$1,504,670	\$145,000	\$163,571	\$150,000	\$105,948	\$0			
LESS: Planned Carry Fwd (Reserve) PY 26-27	(\$489,789)	\$0	(\$158,880)	(\$156,000)	\$0	\$0	\$0	(\$25,708)	\$0	(\$40,000)	(\$15,750)	(\$31,042)	\$0	\$0	(\$62,409)	\$0	\$0	\$0	\$0				
Total Revenue Budgeted PY 25-26	\$8,621,316	\$1,189,590	\$2,088,405	\$805,757	\$90,000	\$8,694	\$8,122	\$140,361	\$241,000	\$733,615	\$64,867	\$163,751	\$1,041,671	\$38,703	\$1,442,261	\$145,000	\$163,571	\$150,000	\$105,948				
Budgeted Mod #1 Expenditures:		Expenditures To Date:																		Total Expenditures	% of Budget		
Salaries & Benefits	\$4,510,508	\$528,300	\$641,240	\$280,597	\$28,511	\$8,481	\$209	\$23,285	\$61,226	\$114,624	\$22,276	\$112,668	\$168,833	\$2,978	\$73,041	\$9,467	\$74,609	\$0	\$39,772	\$2,190,117	48.6%		
Staff Training & Education	\$38,919	\$10,873	\$10,463	\$4,132	\$7	\$0	\$0	\$205	\$284	\$1,611	\$92	\$343	\$698	\$5	\$221	\$0	\$14	\$0	\$435	\$29,383	75.5%		
Facility Costs	\$512,000	\$32,224	\$39,134	\$17,388	\$77	\$59	\$10	\$138	\$6,672	\$112,268	\$1,118	\$5,879	\$13,447	\$92	\$3,094	\$9	\$132	\$0	\$9,477	\$241,217	47.1%		
Furniture & Equipment	\$35,947	\$848	\$1,139	\$492	\$2	\$0	\$0	\$4	\$0	\$19,951	\$32	\$151	\$359	\$0	\$97	\$2	\$5	\$0	\$276	\$23,357	65.0%		
Operating Costs	\$303,977	\$31,615	\$46,549	\$19,727	\$613	\$154	\$71	\$1,713	\$5,117	\$24,704	\$3,536	\$4,798	\$11,731	\$807	\$7,690	\$180	\$1,431	\$0	\$7,746	\$168,183	55.3%		
Program Services	\$3,219,965	\$10,414	\$304,342	\$173,925	\$0	\$0	\$6,995	\$45,085	\$167,696	\$24,835	\$1,031	\$1,209	\$76,566	\$33,295	\$410,927	\$22,485	\$0	\$0	\$2,090	\$1,280,895	39.8%		
Total Expenditures	\$8,621,316	\$614,274	\$1,042,867	\$496,260	\$29,210	\$8,694	\$7,286	\$70,431	\$240,996	\$297,992	\$28,084	\$125,047	\$271,635	\$37,176	\$495,070	\$32,143	\$76,190	\$0	\$59,797	\$3,933,152	45.6%		
Remaining Available Funds		\$575,316	\$1,045,538	\$309,497	\$60,790	\$0	\$836	\$69,931	\$4	\$435,623	\$36,783	\$38,704	\$770,036	\$1,527	\$947,191	\$112,857	\$87,381	\$150,000	\$46,151	\$4,688,164			
% of Funds Expended by Grant		51.6%	49.9%	61.6%	32.5%	100.0%	89.7%	50.2%	100.0%	40.6%	43.3%	76.4%	26.1%	96.1%	34.3%	22.2%	46.6%	0.0%	56.4%	45.6%			
Expiration Dates		6/30/2026	6/30/2027	6/30/2027	6/30/2026	8/31/2025	9/30/2025	12/31/2026	9/30/2025	9/30/2026	9/30/2026	9/30/2026	6/30/2026	10/31/2025	9/30/2026	6/30/2026	6/30/2026	6/30/2026	6/30/2026	9/30/2026			

CareerSource Suncoast
Non-Federal Funds Cash Bal & Exp Summary
From 7/1/2025 Through 12/31/25

Account Code	Account Title	Debit Balance	Credit Balance
10001	Operating Account	\$447,886.36	
10002	Money Market	\$19,097.02	
10003	Edward Jones - Savings	\$873.03	
10004	ComData - Reloadable Card Fund	\$1,445.09	
10006	CD	\$415,000.00	
Total Cash & CDs		\$884,301.50	
16008	One Stop Housing Investment	156,562.04	
40801	Rev - Other Revenue		\$104,341.90
50001	Accounting & Audit	10,793.85	
50005	Client Support Svcs	5,055.97	
50015	IT Maint & Communication	2,255.40	
50016	Travel & Meetings	3,305.27	
50017	Staff Training	3,875.64	
50020	Office Expense	3,408.87	
50022	Outreach & PR	2,925.00	
50025	Rent - Office & Bldg Exp	6,837.00	
50026	Staff Salaries	26,818.39	
50027	Equip & Furn under \$5k/Unit	5,275.00	
50033	401k Employer Contributions	1,035.58	
50034	Payroll Tax	2,000.79	
50035	Employee Benefits	3,715.06	
50052	Client & Employer Services	4,791.38	
50057	Client Support - reloadable debit cards	382.91	
Total Expenses		\$ 82,476.11	



PERFORMANCE REPORT

Measures	PY2024-2025 2nd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q2	PY2024-2025 3rd Quarter Performance	PY2024-2025 % of Performance Goal Met For Q3	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 2nd Quarter Performance	PY2025-2026 % of Performance Goal Met For Q2	PY2025-2026 Performance Goals
Adults:												
Employed 2nd Qtr After Exit	88.5	102.91	84.3	98.02	89.7	104.30	86	88.6	103.02	88.7	103.14	86
Median Wage 2nd Quarter After Exit	\$11,178	122.27	\$12,032	131.61	\$11,971	130.94	\$9,142	\$11,971	130.95	\$11,806	129.14	\$9,142
Employed 4th Qtr After Exit	85.9	97.17	85.2	96.38	85.2	96.38	88.4	82.9	93.78	89.7	101.47	88.4
Credential Attainment Rate	82	106.49	71.1	92.34	76	98.70	77	69.5	90.26	72.9	94.68	77
Measurable Skill Gains	78.7	151.64	78.9	152.02	92	177.26	51.9	79.5	153.18	74.6	143.74	51.9
Dislocated Workers:												
Employed 2nd Qtr After Exit	100	120.48	100	120.48	100	120.48	83	85.7	103.25	80	96.39	83
Median Wage 2nd Quarter After Exit	\$10,200	96.23	\$10,302	97.19	\$6,701	63.21	\$10,600	\$12,482	115.57	\$12,482	115.57	\$10,800
Employed 4th Qtr After Exit	66.7	83.38	75	93.75	100	125.00	80	100	125.00	100	125.00	80
Credential Attainment Rate	77.8	155.60	50	100.00	50	100.00	50	50	83.33	50	83.33	60
Measurable Skill Gains	50	64.43	55.6	71.65	81.8	105.41	77.6	90.9	117.14	84.6	109.02	77.6
Youth:												
Employed 2nd Qtr After Exit	88.9	108.41	89.5	109.15	80	97.56	82	81	98.78	77.3	94.27	82
Median Wage 2nd Quarter After Exit	\$8,104	176.56	\$9,287	202.33	\$10,266	223.66	\$4,590	\$11,045	240.63	\$6,348	138.30	\$4,590
Employed 4th Qtr After Exit	80	100.00	81.3	101.63	83.3	104.13	80	94.7	118.38	85	106.25	80
Credential Attainment Rate	40	53.33	37.5	50.00	30	40.00	75	44.4	59.20	77.8	103.73	75
Measurable Skill Gains	76.9	102.53	71.4	95.20	91.2	121.60	75	77.8	103.73	86	114.67	75
Wagner Peyser:												
Employed 2nd Qtr After Exit	69.6	102.81	68.7	101.48	68.9	101.77	67.7	67.5	99.70	66.7	98.52	67.7
Median Wage 2nd Quarter After Exit	\$8,572	128.88	\$8,364	125.76	\$8,764	131.76	\$6,651	\$8,771	131.87	\$8,638	129.87	\$6,651
Employed 4th Qtr After Exit	68.2	107.06	69.2	108.63	68.3	107.22	63.7	66.1	103.77	65.8	103.30	63.7

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

Local Board Performance



CareerSource Suncoast Program Year 2025, Quarter 1

Letter grades are assigned to local workforce development boards on an annual basis once the program year has ended and all program year data is finalized. The information displayed on this page is preliminary until all program data is complete and deemed final for the program year.

CareerSource Florida, in collaboration with the REACH Office and the Florida Department of Commerce, updates this website on a quarterly basis as the data is made available.

Metrics Data

The table below shows the preliminary data on a rolling four-quarter basis. Visit the [Methodology](#) page of this website for more information on each metric including numerator and denominator definitions. Visit the [Resources](#) page to view or download methodology desk reference documents, a metric cohort timeline spreadsheet and lists of the Employ Florida service codes included in the metrics.

Data as of: 9/30/2025

Metric	Metric Category	Weight	Numerator	Denominator	Rate (%)	YOY Rate Difference	Target (%)	Target Met (%)	Weighted Performance (%)
1. Participants with Increased Earnings	Employment and Training Services, Self-Sufficiency	0.25	584	1,334	43.78	-	50.00	87.56	21.8900
2. Reduction in Public Assistance	Employment and Training Services, Self-Sufficiency	0.25	474	991	47.83	-	50.00	95.66	23.9150
3. Employment and Training Outcomes	Employment and Training Services	0.20	16	18	88.89	-	100.00	88.89	17.7780
4. Participants in Work-Related Training	Training Services	0.10	531	2,195	24.19	-	25.00	96.76	9.6760
5. Continued Repeat Business	Business Services	0.05	2,132	4,062	52.49	-	35.00	100.00	5.0000
6. Year-Over-Year Business Penetration ¹	Business Services	0.05	-	-	-	17.64	100.00	100.00	5.0000
PY 2024-2025 Business Penetration		-	2,605	14,353	18.15	-	-	-	-
PY 2025-2026 Business Penetration		-	5,219	14,581	35.79	-	-	-	-
7. Completion-to-Funding Ratio	Employment and Training Services	0.05	1.80	3.04	59.21	-	100.00	59.21	2.9600
Exiters: Local Board (N) / Statewide (D)		-	1,325	73,421	1.80	-	-	-	-
Budget: Local Board (N) / Statewide (D)		-	\$3,965,345	\$130,277,371	3.04	-	-	-	-
8. Serving Individuals on Public Assistance ²	Employment and Training Services, Self-Sufficiency	0.05	1,408	2,469	57.03	-	-	-	5
TOTAL									91.22



CareerSource Suncoast (CSS) - LWDB 18,
 February 9, 2026 - February 13, 2026
 Preliminary Review Exit Summary

<i>Program</i>	<i>Cases Reviewed</i>	<i>Findings</i>	<i>Other Non-Compliance Issues (ONIs)</i>
Welfare Transition (WT)	29	1	
Supplemental Nutrition Assistance Program - Employment & Training (SNAP E&T)	24		2
Workforce Innovation and Opportunity Act (WIOA) and Special Projects	66	2	5
Rapid Response (RR)			
Wagner-Peyser (WP)	51	1	4
Jobs for Veterans State Grant (JVSG)	35	2	1
Complaint System	35		
Migrant Seasonal Farmworkers (MSFW)	16		2
Board Governance			
Management Process Review		1	
	Totals	7	14

Executive Summary: For the review period of December 1, 2024, to December 31, 2025, programmatic monitoring activities included assessing CSS's program operations, management practices, system protocols, performance outcomes, and internal controls, utilizing FloridaCommerce's programmatic monitoring tools, to determine if CSS operated in compliance with each of the programs' laws, regulations, state and local plans, policies and guidance, and any contract or agreement terms. Monitoring also included sample testing of randomly selected participant case file records from each of the workforce programs reviewed. An acronym list is located at the end of this summary report.

Programmatic and performance issues identified in the report are categorized as findings, issues of noncompliance, and observations based on a scale of high, medium, and low risk probabilities. High, medium, and low risk factors are used to separate issues that present more of a threat to program operations including issues that may potentially impact the fiscal integrity or delivery of services within program operations. While no material issues or weaknesses came to the reviewers' attention other than those contained in the following summary, there is no assurance that other issues do not exist. *NOTE: A voluntary 10-day response period is available following issuance of this summary for CSS to provide additional documentation which may or may not lead to resolution of issues or instances on the final report.*

Corrective Action Plan (CAP): The following general CAP requirements will need to be developed, implemented, and an LWDB response is expected post-issuance of the report to address issues identified below for each Finding, Other Non-Compliance Issue (ONI), and any additional program specific issues identified in the report. The general CAP requirements to be addressed are as follows: copies of updated local operating procedures/policies addressing the requirement; a monitoring schedule showing timeframes activities/services to be monitored; documentation of completed or intended staff training/retraining, including dates, agendas, and roster (as applicable); and written communication to staff regarding the issues.

Common Issue (WIOA, WIOA SP)							
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<p>1. The following is a common issue identified across WIOA, & Special Projects programs.</p> <p>The case file review revealed that CSS's Grievance and Complaint forms, for several participants, did not include the correct name for FloridaCommerce. It was noted that CSS has updated the forms as required by law to include the correct name for filing complaints.</p>	<p><u>FloridaCommerce Memorandum entitled "Welfare Transition Customer Grievance/Complaint Notification" Dated September 14, 2011; TANF State Plan; FloridaCommerce FG 00-004; and 20 CFR 683.600.</u></p>	N/A	N/A	N/A	N/A	Y	<p>CSS must review all files that were opened after the July 1, 2023, name change and determine the number of individuals that signed and received the old forms. Once determined, CSS must document staff's attempts to contact and initiate a new form if the case files are still open and active.</p> <p>CSS RESPONSE:</p>
Totals - Common Issue		0	1	0	0	0	
WT							Total Cases: 24
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions

<p>1. Two participants identified as victims of domestic violence did not have safety plans developed or the required elements from the safety plan included on the IRP/ARP.</p>	<p><u>CareerSource Florida F.G. Domestic Violence P27 Section: RWB Service Provider Duties.</u></p>	<p>N</p>	<p>Y</p>	<p>N/A</p>	<p>N/A</p>	<p>N/A</p>	<p>A safety plan must be developed with the DV victim that specifies alternative requirements that prepare the individual for self-sufficiency while providing for the safety of the individual and the individual's dependents. An individual who is determined to be out of compliance with the ARP/IRP shall be subject to penalties. (If the DV victim states they selected domestic violence, in error on the initial assessment, the LWDB is still required to develop a safety plan for precautionary measures.) required to develop a safety plan for precautionary measures.)</p> <p>CSS RESPONSE:</p>
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<p>Totals - WT</p>	<p>0</p>	<p>1</p>	<p>0</p>	<p>0</p>	<p>0</p>	<p>0</p>	<p></p>
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<p>SYEP</p>	<p>Total Cases: 5</p>
<p>The review did not reveal any Findings, Other Noncompliance Issues, or Observations.</p>	

<p>SNAP E&T</p>	<p>Total Cases: 24</p>						
<p>Issue</p>	<p>Applicable References</p>	<p>Prior Year Finding</p>	<p>Current Year Finding</p>	<p>Prior Year ONI</p>	<p>Current Year ONI</p>	<p>Observation</p>	<p>Compliance Actions</p>

1. Three participants did not have their initial appointment code 590 status code ended within two business days of initial appointment date.	<u>FloridaCommerce Memorandum entitled "Supplemental Nutrition Assistance Program Employment and Training able-bodied Adults without Dependents Initial Engagement Process Changes" dated January 5, 2017.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that the 590 status codes are ended in OSST within two business days of completion of the appointment or no-show. CSS RESPONSE:
2. Two participants were assigned to more than the mandatory work hour requirement.	<u>7 CFR 273.7, 7 CFR 273.24(a)(1)(i), 7 CFR 273.7(e)(2)(i) & (ii); State Plan.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that staff do not assign participants to more than the mandatory work requirement hours per month. CSS RESPONSE:
Totals - SNAP E&T		0	0	0	2	0	

WIOA							Total Cases: 66	
Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions	
Adult/Dislocated Worker (DW)							Cases: 30 (23 Adult/7 DW)	
1. Documentation verifying that supportive services were not available through other	<u>20 CFR 680.900-970; WIOA Sec. 3 (59) and Sec. 134(d)(2); CareerSource Florida Workforce Policy P109 IV.A.</u>	N	Y	N/A	N/A	N/A	CSS must provide documentation to verify that no other resources were available for the funding of the participant's supportive service. CSS	
resources was missing from one participant case files.	<u>and IV.D.2); and Local Supportive Service Policy.</u>						must also provide an assurance that documentation verifying the supportive service was not available through other resources is maintained in the participant's file each time a supportive service is issued. CSS RESPONSE:	

2. Documentation to support the MSG attainment recorded in Employ Florida was missing from three participant case files.	<u>FR Part 677.155 (a)(v); WIOA Section 116; and TEGL 10-16 Change 2 and 14-18.</u>	N/A	N/A	N	Y	N/A	CSS must provide documentation to support the MSGs as recorded in Employ Florida if the cases are still open and active. CSS must ensure that documentation to support MSG attainment is retained in the participant's case file or made available upon request. CSS RESPONSE:
3. Training dates as recorded in Employ Florida for eight participants did not match the documentation retained in the participant's case file.	<u>20 CFR 680.410-420 and .770-840; WIOA Section 122 (b)(1)(D), (b)(4)(A), (a)(3) and 134(c)(3); AP 009 and 90; and TEGL 19-16.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that activity beginning, and end dates are recorded accurately, and timely in Employ Florida. CSS RESPONSE:
Youth		Cases: 18 Out of School					
1. Training dates as recorded in Employ Florida for three participants did not match the documentation retained in the participant's case file.	<u>WIOA Sec. 129(c)(2); Federal Data Validation Requirements TEGL 23-19, change 2.</u>	N/A	N/A	Y	Y	N/A	CSS must provide an assurance that activity beginning, and end dates are recorded accurately, and timely in Employ Florida. CSS RESPONSE:
Special Projects		Cases: 18 (6 Adult/9 DW)					
<ul style="list-style-type: none"> • WIOA-Incumbent Worker-20% Non-Waiver Local Only - Incumbent Worker (3) • 814 - Fostering Opioid Recovery DWG- DW (3) • Hurricane Ian DWG- DW (3) 		<ul style="list-style-type: none"> • Rapid Credentialing 2023- Adult - Adult (3) • Sector-Based Training Initiatives - Adult (3) • Hurricane Helene - DWG- DW (3) 					
1. Credential Documentation was missing from a participant's case file.	<u>Federal Data Validation Requirements TEGL 10-16 Change 3; WIOA Sec. 3(52) and Sec. 116(b)(2)(A).</u>	N	Y	N/A	N/A	N/A	CSS must provide an assurance that Credential documentation is recorded accurately and timely in Employ Florida.

								CSS RESPONSE:
2. Supportive Service (Transportation) activity date recorded in Employ Florida does not match documentation date in one participant's case file.	<u>20 CFR 680.900-970; WIOA Sec. 3 (59) and Sec. 134(d)(2); AP 109; and Local Supportive Service Policy</u>	N/A	N/A	N	Y	N/A		CSS must provide an assurance that activity dates are recorded accurately and timely in Employ Florida. CSS RESPONSE:

3. Occupational Skills Training activity beginning and end dates recorded in Employ Florida do not match the provided ITA in one participant's case file.	<u>20 CFR 680.300,410-420; WIOA Sec. 134(c); AP 90; and TEGL19-16.</u>	N/A	N/A	N	Y	N/A		CSS must provide an assurance that activity beginning and end dates are recorded accurately and timely in Employ Florida. CSS RESPONSE:
Totals - WIOA		0	2	1	5	1		

PERFORMANCE REVIEW COMMENTS

During the performance review of the Dislocated Worker files in which the participants did not meet the negotiated goal for the Median Wage, it was discovered that the region's Dislocated Worker population is small which affects the overall goal when one or two do not meet the metric. It was further discovered some participants had no desire for the Dislocated Worker program because their need was not for further training, it was for securing employment.

During the performance review of the Youth files in which the participants did not meet the negotiated goal for Credential Attainment, it was discovered that these participants were unsuccessful in being employed or enrolled in an education or training program leading to a recognized postsecondary credential within one year following exit. Of the seven Youth participants that did not meet this measure two dropped out of the activity, one transferred to a program that was not on the approved training provider list, three completed the program but either failed the state exam and did not retake it or did not take the licensing exam at all, and one after several documented attempts from the region became unresponsive.

Rapid Response

The review did not reveal any Findings, Other Noncompliance Issues, or Observations.

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
WP - General Cases: 45							
<p>1. One employer-entered H-2B job order was not reviewed by CSSF staff and immediately placed on "hold" status in Employ Florida.</p>	<p><u>FloridaCommerce Memorandum entitled "Processing H2-B, Temporary Non-Agricultural Employment Job Orders," dated June 2, 2015.</u></p>	N	Y	N/A	N/A	N/A	<p>CSS must provide documentation of the efforts made by staff to verify with the employer that the H-2B job order identified in the review was approved by USDOL and FloridaCommerce staff if the job order is still open. An assurance must also be provided that CSS will take necessary steps to immediately place all future H-2B job orders on hold and notify FloridaCommerce via email.</p> <p>CSS RESPONSE:</p>
<p>2. Four job seekers had service codes (113 - Job Search Plan, 106 Provided Internet Job Search Support/Training and 114 Staff Assisted Job Search) recorded in Employ Florida were not adequately documented.</p>	<p><u>Employ Florida Service Code Guide for Jobseeker Services.</u></p>	N/A	N/A	N	Y	N/A	<p>CSS must provide an assurance that CSS staff will review and monitor entry of all WP job seeker services in Employ Florida to ensure the services provided fit the description of the service code(s) recorded and are adequately documented.</p> <p>CSS RESPONSE:</p>
<p>3. Five referrals listed on the "Referrals Pending Review" list were not reviewed by staff within 72 hours.</p>	<p><u>FloridaCommerce AP 72 Section IV: Referral for Workers.</u></p>	N/A	N/A	N	Y	N/A	<p>CSS must provide an assurance that staff have or will regularly review the "Referrals Pending Review" to ensure all future referrals to suppressed job orders in Employ Florida are reviewed within 72 hours. An assurance must also be provided that CSS staff will take necessary steps to track,</p>

							document, and increase the frequency of monitoring of pending referrals in Employ Florida. CSS RESPONSE:
4. One employer had a service code (E07 - Remote/Virtual Employer Contact) recorded in Employ Florida that was not adequately documented. Additionally, one of the services was recorded after the 15-day deadline.	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N	Y	N/A	CSS must provide an assurance that CSS staff will review and monitor entry of all employer services in Employ Florida to ensure the services provided fit the description of the service code(s) recorded and are adequately documented. CSS RESPONSE:
WP/RESEA							Cases: 6
5. Five job seekers' EDPs recorded in Employ Florida were missing specific long and/or short term occupational or educational goals.	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N	Y	N/A	CSS must provide documentation with the CAP that staff have or will develop and/or update the EDP with clear and specific long-term occupational or educational goals and if the application is still open or the job seeker is still active in Employ Florida. Additionally, CSS must provide an assurance that staff have or will review all future EDP codes recorded in Employ Florida to ensure case notes have been recorded identifying all required elements to the service(s) provided. CSS RESPONSE:
Totals - WP		0	1	0	4	0	

JVSG	Total Cases: 35
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Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
JVSG Participants							Cases: 15
1. Veteran Intake Screening (service code 159) was not recorded. This is required even for outreach events.	<u>VPL-05-24-JVSG-Staff-Roles-and-Responsibilities.</u>	N	Y	N/A	N/A	N/A	DVOP specialists may not serve individuals who have not been screened for eligibility and entered into the state's MIS. CSS RESPONSE:
2. DVOPZs OA claims QEB is Low Income, but this was not communicated in the 159's case note - not sure if this was missed and if so, how the client got to the DVOP without a recorded QEB.	<u>Employ Florida Service Code Guide for Jobseeker Services.</u>	N	Y	N/A	N/A	N/A	During intake screening, the specific eligibility category must be identified (i.e., significant barrier to employment or special population) and was not in this instance. CSS RESPONSE:
LVER							Cases: 15
3. LVER: No case note was found documenting resume delivery for the E09 Service Code (Delivered Applications/Resumes).	<u>Employ Florida Service Code Guide for Employer Services.</u>	N/A	N/A	N/A	N/A	Y	The case note must include the job order number, name and title of person receiving the applications/resumes, date the documents were delivered, method of delivery (email, U.S. mail, virtually, in person), and the names of the job seekers. CSS RESPONSE:
VR&E							Cases: 5
The review did not reveal any Findings, Other Noncompliance Issues, or Observations.							
Totals - JVSG		0	2	0	0	1	

Complaint System

Cases: 35

The review did not reveal any Findings, ONIs, or Observations.

MSFW

Total Cases: 16

Issue	Applicable References	Prior Year Finding	Current Year Finding	Prior Year ONI	Current Year ONI	Observation	Compliance Actions
<p>1. MSFW Service Level Indicators: The Palmetto significant office did not meet the Equity Ratio Indicators and Minimum Service Level Indicators during the review period. The Equity Ratio Indicators not met were the received staff-assisted job search activities; received Unemployment Insurance (UI) claim assistance; referred to Federal training; and received individualized career services. In addition, the office did not meet the Minimum Service Level Indicators of median earnings of MSFWs in unsubsidized employment, individuals placed long term in non-agricultural jobs, and individuals placed in a job.</p>	<p><u>20 CFR 653; FG 03-040; Desk Aid; and FloridaCommerce Agricultural Outreach Plan.</u></p>	Y	N/A	N/A	Y	N/A	<p>CSS must provide documentation of a system or plan to provide MSFWs with the full range of career center services, employment assistance, and referrals. The documentation must also include a process for placing MSFWs in jobs. Additionally, CSS must provide an assurance the MSFW Service Level Indicators Report will be monitored regularly to identify service gaps.</p> <p>Note: FloridaCommerce is actively seeking guidance from the U.S. Department of Labor regarding the enforcement of Equity Ratio Indicators. FloridaCommerce will follow up with CareerSource Florida and Board 18 leadership thereafter.</p> <p>CSS RESPONSE:</p>
<p>2. MSFW Outreach Services- Outreach staff did not conduct extensive follow-up contacts with MSFWs as necessary and appropriate to provide necessary services. Additionally, MSFW quality contact goals were not met during the review period.</p>	<p><u>20 CFR 653; FG 03-040; and WIOA Unified Plan.</u></p>	Y	N/A	N/A	Y	N/A	<p>CSS must provide an assurance that as a significant office, it will take all necessary steps to increase outreach activities to locate and contact the majority of MSFWs in the service areas. The assurance must also include a plan or process for follow-up activities to MSFWs.</p> <p>CSS RESPONSE:</p>

3. MSFW Outreach Reports- Outreach reports did not contain the address of agricultural employers, organizations or agencies visited during outreach activities.	<u>20 CFR 653; FG 03-040; and WIOA Unified Plan.</u>	N/A	N/A	N/A	N/A	Y	<p>CSS must provide an assurance that outreach reports will contain all required information, for reporting purposes. The assurance must also include a plan or process for the review of outreach reports, before they are submitted to FloridaCommerce.</p> <p>CSS RESPONSE:</p>
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Totals - MSFW		2	0	0	2	1	
GENERAL PROGRAM COMMENTS							
During the review, the SMA provided technical assistance to center staff on MSFW Performance Indicators, Complaint System, outreach services and reporting, the Wagner-Peyser Staffing Final Rule, and Employ Florida Service Codes.							

Board Governance
The review did not reveal any Findings, ONIs, or Observations

Management Process Review

1. Documentation supporting the completion of the security access forms for newly hired staff was not available for review.	<u>Grantee/Subgrantee Agreement.</u>	N	Y	N/A	N/A	N/A	<p>CSS must provide documentation of completion of the forms identified for all new hires during the review period. Additionally, CSS must provide documentation of the development and implementation of a system to monitor and ensure the completion of forms during the new hire process for all staff. CSS must also provide an assurance that all future new hire documentation will be completed prior to or at hiring and retained.</p> <p>CSS RESPONSE:</p>
Totals - Management Process		0	1	0	0	0	

Acronyms					
ABAWD	Able Bodied Adults without Dependents	FMA	Bureau of Financial Monitoring and Accountability	OST	Occupational Skills Training
AP	Administrative Policy	FY	Fiscal Year	POS	Priority of Service
CAP	Corrective Action Plan	IEP	Individual Employment Plan	PY	Program Year
CFR	Code of Federal Regulations	IRP	Individual Responsibility Plan	RESEA	Reemployment Services and Eligibility Assessment Program
CSS	CareerSource Suncoast	IT	Information Technology	RR	Rapid Response

DCF	Department of Children and Families	ITA	Individual Training Account	SNAP E&T	Supplemental Nutrition Assistance Program Employment and Training
DVOP	Disabled Veterans Outreach Program	IWT	Incumbent Worker Training	SMA	State Monitor Advocate
DWG	Disaster Recovery Dislocated Worker Grant	JPR	Job Participation Rate	S.M.A.R.T	Specific, Measurable, Attainable, Realistic, and Time-Bound
DW	Dislocated Worker	JVA	Jobs for Veterans Act	SYEP	Summer Youth Employment Program
EDP	Employability Development Plan	JVSG	Jobs for Veterans State Grant	TAA	Trade Adjustment Assistance
EEO	Equal Employment Opportunity	LMI	Labor Market Information	TANF	Temporary Assistance for Needy Families
ES	Employment Service	LVER	Local Veterans Employment Representative	TCA	Temporary Cash Assistance
ETA	Employment and Training Administration	LWDB	Local Workforce Development Board	TEGL	Training and Employment Guidance Letter
F.A.C	Florida Administrative Code	MIS	Management Information System	U.S.C.	United States Code
FCDP	Farmworker Career Development Program	MOU/IFA	Memorandum of Understanding & Infrastructure Funding Agreement	WE	Work Experience
FG	Final Guidance	MSFW	Migrant and Seasonal Farmworker	WFS	Workforce Services
FLC	Foreign Labor Certification	MSG	Measurable Skills Gains	WIOA	Workforce Innovation and Opportunity Act
FLSA	Fair Labor Standards Act	ONI	Other Noncompliance Issue	WP	Wagner-Peyser
FloridaCommerce	Florida Department of Commerce	OSPS	Bureau of One-Stop and Program Support	WSA	Work Search Activity
F.S.	Florida Statutes	OSST	One-Stop Service Tracking	WT	Welfare Transition

***This acronym table reflects all acronyms that have been used in the PY 2025-2026 monitoring review cycle. All acronyms may not be used in this report.**



CEO Report



STAFF REPORTS

- Kathy Bouchard, VP/CTO
- Robin Dawson, VP/CFAO
- Anthony Gagliano, VP/COO