

**CONTRACT FOR SERVICES BETWEEN  
CAREERSOURCE FLORIDA, INCORPORATED  
AND  
CANOPY MANAGEMENT CONSULTING GROUP LLC  
AMENDMENT 1  
CONTRACT 2024-25  
FEID #: 85-3291716**

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**Project Name: Master Credentials List Interface, Database and Reporting**

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**Contract Value: \$132,682.21**

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This amendment entered into between the parties to this Contract are CareerSource Florida, Inc., hereinafter referred to as "CareerSource Florida" or "CSF," and Canopy Management Consulting Group LLC, or Canopy, hereinafter referred to as "Contractor", amends contract 2024-2025.

CareerSource Florida and Canopy Management Consulting Group LLC amends this contract to increase the contract amount, update CSF Fiscal Contact, and revise Attachment A. The Contract is amended as follows:

1. The contract amount of \$95,403.00 is deleted and replaced with \$132,682.21 wherever found.
2. Section XI. Invoicing: The CareerSource Florida contact is replaced with the following:

Dana Davis, Chief Financial Officer  
CareerSource Florida, Inc.  
2308 Killearn Center Blvd. Suite 101  
Tallahassee, Florida 32309  
Email: [ddavis@careersourceflorida.com](mailto:ddavis@careersourceflorida.com) and  
[accountspayable@careersourceflorida.com](mailto:accountspayable@careersourceflorida.com)

3. Attachment A is revised to add Deliverable 8, MCL Enhancements, and Deliverable 9, MCL System Administrator Knowledge Transfer and Support.

This amendment and Attachment A will commence on May 6, 2025, or upon execution by the parties, whichever is later and shall expire on June 30, 2026.

All provisions in the contract and any attachment thereto in conflict with this amendment are hereby changed to conform with this amendment.

All provisions not in conflict with this amendment are still in effect and are to be performed at the level specified in the contract.

This amendment and Attachment A are hereby made a part of the contract.

**IN WITNESS WHEREOF, the parties hereto have caused this Contract to be executed by their undersigned officials as duly authorized.**

**For Canopy Management Consulting Group LLC:**

  
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**Brian Swords, Managing Partner  
Canopy Management Consulting Group LLC**

May 7, 2025

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**Date**

**For CareerSource Florida:**

  
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**Adrienne Johnston, President and CEO  
CareerSource Florida, Inc.**

May 6, 2025

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**Date**

**Attachment A**

**Schedule of Deliverables and Payments**

**I. Schedule of Deliverables and Payments**

The following Schedule of Deliverables and Payments is subject to approval by CareerSource Florida and is subject to change based on modifications to the plan during the programming year.

<b>SCHEDULE OF DELIVERABLES AND PAYMENTS</b>		
<b>Deliverable No. 1 – Introduction and Project Management Plan</b>		
<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Facilitate kickoff meeting.</li> <li>2. Develop Project Management Plan (PMP).               <ol style="list-style-type: none"> <li>a. Project Plan Summary;</li> <li>b. Project Scope Management Plan;</li> <li>c. Resource Management Plan;</li> <li>d. Risk Management Plan;</li> <li>e. Communication Plan;</li> <li>f. Project Change Management Plan;</li> <li>g. Quality Management Plan.</li> </ol> </li> <li>3. Develop a detailed project schedule in Microsoft Project.</li> </ol>	<ol style="list-style-type: none"> <li>1. Conduct kickoff meeting(s) and provide completed PMP, as specified, within 10 business days of contract execution.</li> <li>2. Evidence of sign-in sheet(s), PMP plans and any other required documentation must be submitted to and approved by CSF.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to conduct kickoff meeting and submit PMP within 10 business days of contract execution will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>
<b>Deliverable 1 - \$4,139.53</b>		
<b>Deliverable No. 2 – MCL/Linkage Inventory Interface</b>		
<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Develop MCL/Linkage Inventory interface for the ability to load, enter, or modify credentials, occupational linkage data, occupational wage and</li> </ol>	<ol style="list-style-type: none"> <li>1. Demonstrate the MCL/Linkage Inventory interface on or before <b>February 21, 2025</b>.</li> <li>2. Demonstration and functionality must be</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to demonstrate the MCL/Linkage Inventory interface on or before <b>February</b></li> </ol>

demand data, credential sequencing data, and other data elements to be provided by partner agencies.	coordinated with and approved by CSF.	<b>21, 2025</b> , will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.
<b>Deliverable 2 - \$30,380.78</b>		
<b>Deliverable No. 3 – MCL/Linkage Inventory Database</b>		
<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Configure a database for the MCL, including all credentials in-scope for the MCL, occupational linkage data from the Linkage Inventory, occupational wage and demand data from the Labor Market Estimating Conference and FloridaCommerce, credential sequencing data from the Department of Education, and all other data elements necessary for MCL evaluation.</li> </ol>	<ol style="list-style-type: none"> <li>1. Demonstrate MCL/Linkage Inventory database functionality on or before <b>February 21, 2025</b>.</li> <li>2. Demonstration and functionality must be coordinated with and approved by CSF.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to configure and demonstrate the MCL/Linkage Inventory database on or before <b>February 21, 2025</b>, will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>
<b>Deliverable 3 - \$30,380.78</b>		

<b>Deliverable No. 4 – Data Export and Publication</b>		
<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Develop data export and publication functionality to enable internal users the ability to generate custom reports through cross-functional reporting software and publish on the web or in printable formats.</li> </ol>	<ol style="list-style-type: none"> <li>1. Demonstrate data export and publication functionality on or before <b>February 28, 2025</b>.</li> <li>2. Demonstration and functionality must be coordinated with and approved by CSF.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to develop and demonstrate data export and publication functionality on or before February 28, 2025, will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>
<b>Deliverable 4 - \$14,284.87</b>		
<b>Deliverable No. 5 – Training and User Training Guide</b>		
<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. User Training Guide for how to use/modify the interface, database, and exporting/reporting functionality.</li> <li>2. Conduct one (1) in-person training session for how to use/modify the interface, database, and exporting/reporting functionality.</li> </ol>	<ol style="list-style-type: none"> <li>1. Submittal of the User Training Guide and facilitation of the training session which must be evidenced by sign-in sheet. The session must be completed prior to the <b>March 15, 2025</b> go live.</li> <li>2. User Training Guide and sign-in sheet must be submitted to and approved by CSF.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to submit the User Training Guide and failure to conduct the training session by March 15, 2025, will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>

Deliverable 5 - \$6,644.40

**Deliverable No. 6 – Weekly Status Meetings and Status Reports**

Description / Tasks	Performance Measures	Financial Consequences
<ol style="list-style-type: none"> <li>1. Facilitate weekly status meetings with CSF Program Director and document with a status report.</li> <li>2. Support post-delivery technical assistance</li> </ol>	<ol style="list-style-type: none"> <li>1. For each month, submit weekly status reports within five (5) business days from the last calendar day of each month.  Weekly Status Reports and any other required documentation must be submitted to and approved by CSF.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to submit weekly status reports within five (5) business days from the last calendar day of each month will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>

Deliverable 6 - \$5,433.12

**Deliverable No. 7 – Project Closure**

Description / Tasks	Performance Measures	Financial Consequences
<ol style="list-style-type: none"> <li>1. Submit a Project Closure Report which includes details of the activities needed to close out all Project activities, tasks, and reports.</li> <li>2. Supporting reports to the Project Closure Report that shall be provided by the contractor include:               <ol style="list-style-type: none"> <li>a. Lessons Learned Project Report;</li> <li>b. Project Release Document (Signed);</li> <li>c. Change Log (Closed Out);</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>1. Submittal of the Project Closure Report, as specified, within five (5) business days of final acceptance of the last deliverable for <b>Deliverable 6</b>.</li> <li>2. The Project Closure Report must be evidenced by documentation required below, and any other required documentation, and must be submitted to and approved by CSF:               <ol style="list-style-type: none"> <li>a. Lessons Learned Project Report;</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to submit the Project Closure Report supported with required documentation within five (5) business days of final acceptance of the last deliverable for Deliverable 6, as specified, will result in a deduction of 5% of the deliverable cost for each</li> </ol>

<p><b>d. Contract(s) Closure.</b></p>	<p><b>b. Project Release Document (Signed);</b>  <b>c. Change Log (Closed Out);</b>  <b>d. Contract(s) Closure.</b></p>	<p>calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</p>
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**Deliverable 7 - \$4,139.52**

**Deliverable No. 8 – MCL Enhancements**

<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Application page updates to include: <ul style="list-style-type: none"> <li>-adding additional questions to each application.</li> <li>-Making all critical questions dynamic so applicant only answer relevant questions.</li> <li>-Automated email functionality that allows decision letters/notifications to be emailed from the system.</li> <li>-Functionality for each organization to insert notes/comments throughout the evaluation process in each application. - Applications include automated reasons for denial as related to Framework of Quality.</li> </ul> </li> <li>2. Further appeal build out to include: <ul style="list-style-type: none"> <li>- The initial application and decision/reason for denial automatically being included when appeals are initiated.</li> <li>-Automated email functionality that allows decision letters/notifications to be emailed from the system.-</li> </ul> </li> <li>3. Changes to approvals to include: -Automated email functionality that allows</li> </ol>	<ol style="list-style-type: none"> <li>1. Remove/Add fields, update question order, additional dependencies, User interface updates. Add email, note taking, dynamic and automated reasons for denial functionalities.</li> <li>2. Develop updates to appeal, denial matrix, approval process . Add initial application, email, notes and include automated reasons for denial as related to Framework of Quality.</li> <li>3. Develop updates to approval processes, queues, groups</li> <li>4. Develop form templates and populate data, auto add to application submitted status</li> <li>5. Load data with SOC linkages from JotForm data</li> <li>6. Load data from appeals tracking</li> <li>7. Reload/update of Credential data to include missing data such as dates and Rep SOC codes</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to develop and demonstrate 14 MCL Enhancements functionality on or before August 15, 2025, will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</li> </ol>

<p>decision letters/notifications to be emailed from the system. -Functionality for each organization to insert notes/comments throughout the evaluation process in each application. -Rename "Approval History" to "Final Work Group Approval"</p> <ol style="list-style-type: none"> <li>4. Saving application as PDF to application record</li> <li>5. Loading historical application</li> <li>6. Load historical appeals data</li> <li>7. Update of Credentials Data</li> <li>8. Automated Notifications</li> <li>9. MCL Communications in system</li> <li>10. Data loading assistance</li> <li>11. Automate Data Loading process</li> <li>12. Reporting Assistance</li> <li>13. Automate wage / demand determination</li> <li>14. Deployment</li> </ol>	<ol style="list-style-type: none"> <li>8. Create email templates and additional automated internal and external communications. Add email templates and assign to notifications</li> <li>9. Configure and train on using Email and tasks for all communications regarding MCL</li> <li>10. Provide additional training for data loaders using Data Loader or Data Import Wizard</li> <li>11. Develop process for auto mapping data in upload process</li> <li>12. Provide additional reporting training for users and develop up to 15 additional reports / 5 Dashboard on MCL system, development of CAPE and FDACS specific reports</li> <li>13. Provide automation of Wage / Demand Data evaluation based on multiple SOCs</li> <li>14. Deploy and test enhancements to Partial Sandbox and Production</li> </ol>	
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**Deliverable 8- \$35,852.32**

**Deliverable No. 9 – MCL System Administrator Knowledge Transfer and Support**

<b>Description / Tasks</b>	<b>Performance Measures</b>	<b>Financial Consequences</b>
<ol style="list-style-type: none"> <li>1. Support for Master Credential List application system administration</li> </ol>	<ol style="list-style-type: none"> <li>1. Provide knowledge transfer and training for CareerSource Florida Salesforce Administrator on MCL. The training will be remote and include 8 hours.</li> </ol>	<ol style="list-style-type: none"> <li>1. Failure to provide training and knowledge transfer to the CareerSource Florida Salesforce Administrator for the MCL application by</li> </ol>

		<p>August 29, 2025 will result in a deduction of 5% of the deliverable cost for each calendar day beyond the due date. Such reduction shall be made from the deliverable payment.</p>
<b>Deliverable 9 - \$1,426.89</b>		
<b>Amendment 1 Amount - \$37,279.21</b>		
<b>Total Contract Amount - \$132,682.21</b>		