



**Human Resources Management and Consulting Services
HR Expertise, Inc.
Scope of Work—2025-26**

- I. Term: The Term of this Scope of Work is from July 1, 2025, through June 30, 2026, unless otherwise amended or terminated.

- II. Services: During the Term of this Agreement, HR Expertise, hereinafter referred to as HR Expertise or Contractor, agrees to provide a comprehensive suite of strategic, tactical, compliance and data-driven Human Resources Services. It is agreed through the acceptance of this Scope of Work that HR Expertise offers these services at a principal and/or senior consultant level, as defined by the General Services Administration. These services include, but are not limited to Trustee and Fiduciary Services, Talent Acquisition, Management Consulting, Special Services and Projects, Executive Services/Consultation and Initiatives, and on-demand services as requested.

1. Trustee and Fiduciary Services:

The Employee Retirement Income Security Act of 1974 (“ERISA”) governs qualified retirement plans. ERISA imposes specific duties and responsibilities on the “fiduciaries responsible for administrating retirement plans

- Serve as a designated trustee and fiduciary of CareerSource Florida 401k Salary Savings Plan. Designated as plan administrator on behalf of CSF and for plan distributions and loan payments.
- Conduct an annual fiduciary review of plan assets and distribute mandatory compliance notifications to active and nonactive employees, ie. QDIA
- Review, approve and submit 5500 returns for 401(k)/Salary Savings Plan to DOL by July 31. Respond to government and compliance inquiries as required.
- Respond to active and inactive participant inquiries regarding plan assets and performance.
- Serve as fiduciary and privacy officer for CareerSource Florida Section 125 plans.
- Administer short-term emergency savings plan, deposits, and reporting.

2. Human Resources, Talent Acquisition, and Management Consulting Services; Executive (C-Level) Development and Initiatives:

- Administer company payroll and time and attendance. Submit standard payroll or leave reports and prepare customized management reports for data-driven decision making. Utilize E-Verify to validate authorization to work status.

- Evaluate employee health and welfare plans, provide recommendations, conduct enrollment, and administer plans. Serve as primary contact with brokerage firms. Complete applications for coverage and procurement documents following CSF policy. Coordinate non-company sponsored or supplemental benefit plans, if applicable.
- Develop personnel recommendations for management in compliance with federal and state regulations; Develop and interpret policies and programs.
- Provide employee relations coaching facilitating the resolution of performance issues while mitigating risk. Investigate employee complaints, and report findings to management with recommendations. Assess and anticipate HR-related needs and execute recommendations for resolution.
- Recruit talent as required, provide job descriptions, resume screening and evaluation, develop and post job advertisements, develop and recommend candidate assessment instruments, and interview schedules. Maintain official employment and employee medical records under HIPAA guidelines.
- Develop, facilitate or coordinate employee training and professional development initiatives to foster team growth and organizational health.
- Function as a key advisor to leadership on corporate ethics and investigations of suspected and reported violations of CSF policies. This role collaborates directly with CSF leadership including the CSF General Counsel (Chief Ethics Officer), and CSF legal counsel (if required). Coordinates and supports the development of ethics policies, guidelines, program administration, and employee compliance training.
- Implement performance management solutions for use in the evaluation of CSF staff. Assist staff in achieving goal attainment by effectively utilizing the performance management system. Work with management and staff to implement system elements, including goal setting, performance review, and performance improvement plans.
- Respond to local, state, and or federal audit requests as required.
- Respond to Re-employment Assistance claims and represent CareerSource Florida at administrative hearings if required.
- Manage corporate insurance programs (D&O, EPLI, General Liability, and Worker's Comp). Coordinate the procurement and modification of plans and claims and conduct GL and Worker's Compensation Audits.
- Maintain and track to ensure compliance for CSF corporate entity documents and applicable renewals (DBPR, Annual Report, REA). Provide responses to legal employment-related requests for information, such as garnishments and subpoenas.
- Coordinate special events as required.

- Identify prospective training, conferences, or initiatives to develop C-level leadership competencies and capabilities further, expanding business acumen and outreach skills through expertise and engagement with organizations and key industry sectors supporting CSF's vision and mission. Identify and coordinate training and development opportunities to enhance organizational health.
 - Coordinate the President's performance planning and review process. Provide recommendations to improve the process and system elements through ongoing Board engagement.
 - Support the Executive Office of the Governor and BOD Chairman and committees in CSF Executive Search efforts, if required. Support the President/CEO in leadership and organizational talent search efforts.
 - Review, develop, and implement organizational strategic policies and procedures.
 - Provide on-demand HR talent learning and development initiatives, or special projects and services as required.
3. Special and Adjunct Services and Projects
- Digital Human Resources/Confidential Personnel and Corporate Records Update, Implementation, Quality Review, Maintenance and Reporting:
 - The HR Digital Records repository is available on the CSF Sharepoint team storage site. HR Expertise will continue to convert from hard copy to digital format all corporate records, past and present, for upload and cloud storage. This includes but is not limited to revising or transferring personnel and corporate digital record categories and records based on organizational libraries: Employee, Corporate, Medical, and I-9 forms.
 - Conduct periodic audits of HR digital records and continue to scan all personnel-related documents and records for upload and cloud storage.
 - Generate and submit reports including and not limited to direct and indirect costs by position, monitoring, and audit reports as required. Utilize Paycor data to generate baseline and individual total compensation statements and complete a report of paid time off leave liability as required.
 - As HR information systems administrator, perform ongoing maintenance, employee support, and integration needs.
 - Research, develop, implement, and communicate system upgrades and efficiency tools, including the evaluation of payroll process, including but not limited to mapping and testing.
 - Research, develop, and implement performance management process and enhancement of employee onboarding and offboarding utilizing the Paycor platform or assessment.

- Develop and deliver employee virtual and in-person training modules for HRIS systems, talent/performance management, soft skills and compliance training. It is estimated that these services and platform updates with ongoing HR and corporate records maintenance and reporting will incur a minimum of 160 hours worked at a monthly rate of **\$5,120**. CSF will not incur additional administrative or travel expenses to facilitate project implementation or maintenance. The total estimated cost is **\$61,440**.
- 4. Payment for Services: In consideration of the performance of these services, CSF agrees to pay HR Expertise for the satisfactory completion of services included in the term of this Scope of Work. Payments will be issued as follows:
 - I. Services. Within 15 days of receipt of a monthly HR Expertise invoice, CSF shall authorize and issue a monthly payment to HR Expertise for the satisfactory completion of services specified in II. Services: 1. Trustee and Fiduciary Services and 3. Human Resources, Talent Acquisition, and Management Consulting Services; (C-Level) Development and Initiatives, and on-demand services (at \$68.00 per hour by Principal Consultant) for a minimum of 170 hours per month for the period of July 2025 – June 2026; invoice not exceeding **\$11,560** per month. **Total: \$138,720**
 - Travel by HR Expertise, Inc. may also be reimbursed for up to \$9,500 for CSF- business-related travel. **Total: \$9,500**
 - Administrative costs and screening services. beyond typical office supplies may be reimbursed directly by CSF (such as Annual Report filing, training related supplies, and background screening), not to exceed \$1,000. **Total: \$1000**
 - Special Services and Projects. Within 15 days of receipt of a monthly HR Expertise invoice, CSF shall authorize and issue a monthly payment to HR Expertise for the satisfactory completion of special services and projects in II. Services: 3. Special Services and Projects (at \$32.00 per hour by Senior Consultant) for a minimum of 160 hours per month for July 2025– June 2026; invoice not exceeding **\$5,120** per month. This rate includes the assignment of a dedicated Sr. Consultant. **Total: \$61,440**.

Total Contract Amount: \$210,660



Submitted on behalf of the Contractor:

CF Daye 6/11/2025

Signature/Date

Christine Daye
President
HR Expertise, Inc.
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Orlando, FL 32817
(p) 321.274.6584

For CareerSource Florida, Inc.:

Jason McCandless 6/30/2025

Signature/Date

Jason McCandless
Chief Operating Officer
CareerSource Florida, Inc.
2308 Killearn Center Blvd
Tallahassee, FL 32309