



**Human Resources Management and Consulting Services
HR Expertise, Inc.
Scope of Work—2024-25**

- I. Term: The Term of this Scope of Work is from July 1, 2024, through June 30, 2025, 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 Human Resources Services – Strategic and Tactical, and Compliance, Talent Acquisition, Fiduciary and Trustee Services, Management Consulting, Special Services and Projects, Executive Services/Consultation and Initiatives, and on-demand services as requested. It is agreed through the acceptance of this Scope of Work that HR Expertise offers these services at a senior consultant level, as defined by the General Services Administration. These services include, but are not limited to:

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 administering retirement plans

- o Serve as designated trustee and fiduciary of CareerSource Florida 401k Salary Savings Plan. Designated as plan sponsor on behalf of CSF and administrator for plan distributions and loan payments.
- o Conduct an annual fiduciary review of plan assets and distribute mandatory compliance notifications to active and nonactive employees, ie. QDIA
- o 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.
- o Respond to active and inactive participant inquiries regarding plan assets and performance.
- o Serve as fiduciary and privacy officer for CareerSource Florida Section 125 plans.
- o Administer short-term emergency savings plan, deposits, and reporting.

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

- o **Ethics Support:** Serves as a trusted consultant to leadership on corporate ethics and investigation of suspected and reported violations of CSF policies. This role has direct access and interaction with CSF leadership including CSF Sr. Attorney, and CSF legal counsel. Coordinates and supports the development of ethics policies, guidelines, program administration, and employee training, such as public records. In coordination with CSF’s Management Information Systems team, evaluates,

implements, and may directly oversee the implementation and operation of a CSF Ethics Hotline.

- Administer company payroll and time and attendance. Submit standard payroll or leave reports and prepare customized monthly, quarterly, or annual management reports as requested. Utilize E-Vny to validate authorization to work status.
- Evaluate employee health and welfare plans, provide recommendations, conduct enrollment, and administer plans (Medical, including, but not limited to COBRA plan), Dental, Life, STD, LTD, AD&D). 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; Maintain current updated employee handbook.
- Provide employee relations coaching and recommend guidelines to mitigate risk and resolve performance and behavior issues. Investigate employee complaints, and report findings to management with recommendations. Assess and anticipate HR-related needs and execute recommendations for resolution.
- 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.
- Modify performance evaluation tools to promote and communicate strategies supporting professional growth and mutual respect. Respond to local, state, and or federal audit requests as required.
- Respond to Re-employment Assistance claims and represent CareerSource Florida at administrative hearings.
- 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). Record entity documents for local workforce boards to ensure appropriate response to potential claims and records requests received or served. Respond to legal employment-related requests for information, such as garnishments and subpoenas.
- Recruit talent as required, provide sample job descriptions, resume screening and evaluation, develop and post job advertisements, develop and recommend candidate assessment instruments, and schedule interviews. Maintain official employment and employee medical records under HIPAA guidelines.
- Coordinate special events as required.

- Assess and implement monthly or quarterly organizational training and development and teambuilding informational opportunities for staff.
 - HR Expertise will 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 Board engagement continuously.
 - 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 search efforts.
 - Review, develop, and implement organizational strategic policies and initiatives as the COO/CFO requires.
 - Provide on-demand HR and talent services or special projects 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 has been upgraded and is now 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 past for upload and cloud storage.
 - Generate and submit biweekly or monthly reports obtained from digital records of direct and indirect costs by position, monitoring, and audit reports to CSF Accounting Director 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 transformation of CSF's payroll process, including but not limited to mapping and testing.
 - Research, develop, and implement performance management process and enhancement of employee onboarding 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 2024 – June 2025; invoice not exceeding **\$11,560** per month. **Total: \$138,720**
 - Travel by HR Expertise, Inc. may also be reimbursed up to \$9,500 for CSF-business-related travel. **Total: \$9,500**
 - Administrative costs and screening services. Items required above and beyond typical office supplies may be reimbursed directly by CSF (such as Annual Report filing, training-related supplies, job postings, and background screening), not to exceed \$2,500. **Total: \$2,500**
 - 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 2024 – June 2025; invoice not exceeding \$5,120 per month.

This rate includes the assignment of a dedicated Sr. Consultant for the project's duration. CSF will not incur additional administrative costs or travel expenses to facilitate and maintain ongoing support of this project.
Total: \$61,440.

Total Contract Amount: \$212,160

Submitted on behalf of the Contractor:

OF Daye / June 7, 2024

Signature/Date

HR Expertise, Inc.
10151 University Blvd.
Orlando, FL 32817
(p) 321.274.6584

For CareerSource Florida, Inc.:

Jason McCandless 2 Jul 24

Signature/Date

Jason McCandless
Chief Operating Officer
CareerSource Florida
PO Box 13179
Tallahassee, FL 32317