



CareerSource CLM  
2703 NE 14<sup>th</sup> Street  
Ocala, FL 34470

## Executive Committee Meeting

Wednesday, January 30, 2026 – 9:00 a.m.

Join Zoom Meeting: <https://us02web.zoom.us/j/89925438802>

Phone No: 1-646-558-8656 (EST) Meeting ID: 899 2543 8802

Call to Order  
Roll Call  
Approval of Minutes, November 19, 2025

Pages 2 - 4

C. Flanagan  
C. Schnettler  
C. Flanagan

### DISCUSSION ITEMS

None

### PUBLIC COMMENT

### ACTION ITEMS

Insurance Benefits RFP

Pages 5 - 10

R. Skinner

### PROJECT UPDATES

None

### MATTERS FROM THE FLOOR

### ADJOURNMENT

2025 – 2026 MEETING SCHEDULE							
Performance/ Monitoring	Business and Economic Development	Career Center	Marketing / Outreach	Education and Industry Consortium	Executive	Full Board	
Unless noted otherwise all committee meetings are held at CareerSource CLM, 2703 NE 14 <sup>th</sup> Street, Ocala, FL 34470							
Tuesday 9:00 am	Wednesday 9:00 am	Thursday 9:30 am	Wednesday 9:00 am	Thursday 9:00 am	Wednesday 9:30 am	Wednesday, 11:30 am	
8/5/2025	8/6/2025	8/7/2025	8/13/2025	8/14/2025	8/27/2025	9/3/2025	CF Levy
11/4/2025	11/5/2025	10/30/2025	11/12/2025	11/13/2025	11/19/2025	12/10/2025	CF Ocala
					1/30/2026		
2/3/2026	2/4/2026	2/5/2026	2/11/2026	2/12/2026	2/25/2026	3/4/2026	CF Lecanto
5/5/2026	5/6/2026	5/7/2026	5/13/2026	5/14/2026	5/27/2026	6/10/2026	CF Ocala

### OUR VISION STATEMENT

*To be recognized as the number one workforce resource in the state of Florida by providing meaningful and professional customer service that is reflected in the quality of our job candidates and employer services.*



**CAREERSOURCE CITRUS LEVY MARION  
Executive Committee**

**MINUTES**

DATE: November 19, 2025  
PLACE: 2703 NE 14<sup>th</sup> Street, Ocala, FL 34470  
TIME: 9:30 a.m.

**MEMBERS PRESENT**

Al Jones  
Arno Proctor  
Carl Flanagan  
Charles Harris  
Fred Morgan  
Jeff Chang  
Pete Beasley

**MEMBERS ABSENT**

**OTHER ATTENDEES**

Rusty Skinner, CSCLM  
Dale French, CSCLM

Cira Schnettler, CSCLM  
Bob Stermer, Board Attorney

**CALL TO ORDER**

The meeting was called to order by Carl Flanagan, Chair, at 9:30 a.m.

**ROLL CALL**

Cira Schnettler called roll and a quorum was declared present.

**APPROVAL OF MINUTES**

Al Jones made a motion to approve the minutes from the August 27, 2025, meeting.  
Pete Beasley seconded the motion. Motion carried.

**DISCUSSION ITEMS**

**State Update**

Rusty Skinner provided the following update:

- CareerSource Florida and Florida Commerce sent a letter to the Chair informing the Board that our region has been placed on a performance improvement plan. Commissioner Zalak and Board Chair Carl Flanagan, along with CLM leadership attended a conference call on November 14 with the State representatives to identify the metrics that need improvement, so that a corrective action plan can be developed.
  - Carl Flanagan applauded Rusty Skinner on his handling of the meeting.

Concerns were raised and addressed by both sides. As part of the efforts to adhere to the metrics identified for needing improvement we will be shifting our approach in such areas as dislocated workers, event management, and apprenticeships. Some restructuring has already begun.

#### Workforce Issues that are Important to our Community

There were no issues discussed

#### **PUBLIC COMMENT**

None

#### **ACTION ITEMS**

##### WRA Grant

Rusty Skinner explained that CareerSource CLM will be partnering with the City of Williston and other agencies to submit an application for grant funds to provide career awareness and training elements for careers in the aviation industry. We submitted a grant request for \$150,000 to CareerSource Florida to assist in funding the project. We have proposed using \$70,000 for career path marketing. The City of Williston will be the grant applicant for the grant provided through US EDA. We will reimburse the City of Williston up to \$80,000 for the completion and delivery of the Workforce, Labor, and Market Study for the Williston Regional Airport Economic Development Plan. There are anticipated revisions to the contract language, and the final contract will be presented at the December Board meeting. We will be sending a letter of commitment to the City of Williston. Charles Harris approved sending the letter of commitment to the City of Williston. Pete Beasley seconded the motion. Motion carried.

##### Continuity of Operations Plan

Dale French explained that the continuity plan is now a requirement by CareerSource Florida and will be a component of the annual monitoring. The document will be a living document that will require routine updates of information with any major changes needing to be approved by the Board. Arno Proctor made a motion to approve the Continuity of Operations Plan. Jeff Change seconded the motion. Motion carried.

##### Internal Control Questionnaire

Dale French informed the committee that the Internal Control Questionnaire is a compliance tool to review our IT and finance systems. CareerSource Florida requested the tool be completed and returned before the committee and board meetings. Once the tool has been approved by this committee it will be submitted. Pete Beasley approved the questionnaire to be signed by the board chair and submitted. Arno Proctor seconded the motion. Motion carried.

##### Gazelle Conversion

Dale French explained that an additional piece of software was needed in the Gazelle conversion. Fred Morgan approved the one-time sole source purchase from CSM Consulting to complete the Gazelle system replacement. Arno Proctor seconded the motion. Motion carried.

##### CF Lease

Charles Harris approved the 12-month CF lease agreement. Arno Proctor seconded the motion. Motion carried.

### **PROJECT UPDATES**

#### **Paycom Conversion**

Dale French was happy to report that the conversion was successful. ADP services will be available through January 31, 2026, as a precautionary measure in the event any additional information needed to be pulled from the software.

### **MATTERS FROM THE FLOOR**

None

### **ADJOURNMENT**

There being no further business, the meeting was adjourned at 10:48 a.m.

**APPROVED:**\_\_\_\_\_



## **RECORD OF ACTION/APPROVAL**

### **Executive Committee Friday, January 30 2026**

#### **TOPIC/ISSUE:**

Insurance Broker Request for Proposals (RFP)

#### **BACKGROUND:**

As insurance rates continue to climb, we feel it is prudent to seek out a brokerage firm that can provide the greatest value to our organization. A review of proposals will allow us to gauge what firms may provide the highest level of service.

#### **POINTS OF CONSIDERATION:**

The RFP requests respondents to provide information on level of service availability (Region 10 and Region 6) as well as access to multiple carriers and willingness to negotiate on our behalf.

#### **STAFF RECOMMENDATIONS:**

Approve issuing the attached RFP.

#### **COMMITTEE ACTION:**

#### **BOARD ACTION:**

# Request for Proposal (RFP): Health Insurance Brokerage Services

## CareerSource Citrus Levy Marion

2703 NE 14<sup>th</sup> Street  
Ocala, FL 34470

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### Scope of Work

CareerSource Citrus Levy Marion (CSCLM) is seeking proposals from qualified health insurance brokers to provide strategic benefits consulting, carrier negotiation, plan design support, compliance guidance, and ongoing employee benefits administration. The selected broker will help us secure competitive, high-quality health insurance options that meet the needs of our workforce while supporting our organizational goals around cost control, employee satisfaction, and regulatory compliance.

The broker will work closely with our HR, finance, and executive teams to ensure smooth annual renewals, data accuracy, employee education, and long-term benefits strategy. The selected partner must demonstrate strong expertise in corporate health benefits, transparent compensation practices, and a commitment to proactive service.

The geographical area of service is within the following counties in Florida: Citrus, Levy, Marion, Madison, Taylor, Lafayette, Suwannee, Hamilton.

Our goal is to finalize broker selection on **March 4, 2026**. Plans for the next year will be selected no later than May 25, 2026 with open enrollment during the first two weeks of **June**. New policies will go into effect on **July 1**.

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### Overview

CareerSource Citrus Levy Marion is reviewing its employee benefits strategy to improve cost efficiency, plan performance, and employee experience. We are seeking a broker who can:

- Provide comprehensive health and ancillary insurance brokerage and consulting services
- Deliver data-driven insights and benchmarking
- Support plan design, renewal negotiations, and multi-carrier analysis
- Ensure compliance with federal and state regulations
- Offer year-round employee support and communication resources
- Provide assistance with benefit integration into our existing Paycom Human Resources and payroll system

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## **Service Requirements**

The selected broker must provide:

### **Plan Strategy & Design**

- Annual plan review and recommendations
- Market analysis and benchmarking against similar employers
- Evaluation of funding models (fully insured, level-funded, self-funded)
- Cost-containment strategies and long-term planning

### **Carrier & Vendor Management**

- Marketing of plans to multiple carriers
- Rate negotiation and contract review
- Renewal analysis with clear justification for changes
- Support with ancillary benefits (dental, vision, life, disability)
- Provide integration of ancillary benefits into the open enrollment process

### **Compliance & Regulatory Support**

- Guidance on ACA, ERISA, COBRA, HIPAA, and state insurance laws
- Required reporting support (1095-C, SBCs, etc.)
- Assistance with audits or regulatory inquiries

### **Employee Support & Communication**

- Open enrollment planning and execution
- Employee education materials and presentations
- Claims advocacy and issue resolution
- Provide assistance with integration of benefits selection and open enrollment activities with Paycom software
- Local representation
- Multiple location management experience

### **Account Management**

- Dedicated account manager and service team
  - Regular reporting on claims trends, utilization, and cost drivers
  - Quarterly strategy meetings
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## Desired Capabilities

- Customizable reporting dashboards
  - Online enrollment or HRIS integration support (Paycom)
  - Wellness program guidance
  - Predictive analytics or AI-driven insights (preferred but not required)
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## Selection Criteria

Proposals will be evaluated based on (see scoring matrix attached):

- Alignment with requested services and corporate needs
- Demonstrated experience with employer groups of similar size
- Strength of carrier relationships and negotiation capabilities
- Cost transparency and compensation structure
- Technology tools and reporting capabilities
- Implementation and service model
- Innovation and added value

Shortlisted brokers may be invited to present a live demonstration of their service model, technology tools, and proposed approach.

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## Proposal Requirements

Each proposal must include:

- A signed letter of intent from an authorized representative
  - Description of your brokerage firm, team and team structure
  - Staff qualifications
  - Detailed overview of services and approach
  - List of insurance companies the broker works with
  - Compensation model (commission, fee-based, hybrid)
  - Breakdown of any additional costs
  - Implementation and onboarding timeline
  - Sample reporting tools or dashboards (if applicable)
  - References from similar corporate clients
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## Estimated Expenditures

CareerSource Citrus Levy Marion estimates annual health policy costs to be in the range of \$620,000.00, depending on services and structure. All funds used for the deliverables



of this RFP are from the U.S. Department of Labor with no share coming from other sources.

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## Proposal Submission and Timeline

- **RFP Release Date:** Monday, February 1, 2026
- **Proposal Due Date:** Friday, February 13, 2026 by 4:00pm EST
- **Review Period:** February 16-18, 2026
- **Broker Presentations (if requested by CSCLM):** February 19, 2026
- **Executive Committee Selection:** February 25, 2026
- **Board Approval:** March 4, 2026

Submit one (1) electronic PDF file to Iris Pozo via email or flash drive (mailed):

**Iris Pozo**  
**Human Resources Manager/EO Officer**  
**lpozo@careersourceclm.com**  
**2703 NE 14<sup>th</sup> Street, Ocala, FL 34470**  
**352-873-7939 ext. 1286**

Submissions should be clearly labeled **“Health Insurance Brokerage Proposal.”**  
**Submissions must be received no later than 4:00pm est on Friday, February 13, 2026.**

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## Additional Procurement Conditions

- The company reserves the right to terminate this procurement if funding or business conditions change.
- Any party wishing to protest the selection must submit a written protest within three business days of the board’s decision.
- Protests should be addressed to:  
**Carl Flanagan – Board Chair**  
**CareerSource Citrus Levy Marion**  
**2703 NE 14<sup>th</sup> Street, Ocala, FL 34470**

Upon receipt, the Executive Committee will convene a hearing and notify all affected parties.

CareerSource Citrus Levy Marion must ensure compliance with section 287.133(2)(a), Florida Statutes and will verify that no selected vendor or contractor is on the Convicted Vendor List.

## Scoring Matrix

CRITERIA	MAXIMUM POINTS
1. Respondent's capabilities align with the requirements and desired services contained in the procurement document.	20
2. Project team and staff qualifications.	20
3. Compensation model is cost reasonable	20
4. Number and selection of agencies within the responding entity's portfolio	10
5. Demonstrated experience by the proposing entity with organizations of similar size and situation	10
6. Proposing entity's ability to meet implementation timeline goals set forth in the RFP.	10
7. Quality of references	10
TOTAL - MAXIMUM POINTS	100