

REVENUE DIVERSITY & NEW MARKETS COMMITTEE MEETING

BEGINS WITH A DREAM.

CareerSource Central Florida | 5/28/25 CareerSourceCentralFlorida.com

5/28/25 REVENUE DIVERSITY & NEW MARKETS COMMITTEE MEETING DETAILS

Meeting Details

Meeting Agenda

Welcome

Roll Call

Public Comment

Approval of Minutes

Information/
Discussion/
Action Items

Other Business

Adjournment

What: Revenue Diversity & New Markets Committee Meeting

When: Wednesday, May 28, 2025

3:00 p.m. – 4:30 p.m.

Where: Virtual Option via Zoom:

Link: https://careersourcecf.zoom.us/j/89861484219?pwd=forjgFGbR3FcUszFVfYRilbPvqdHVe.1

Dial In: 1 (929) 205-6099 / Meeting ID: 898 6148 4219 / Passcode: 561505

5/28/25 REVENUE DIVERSITY & NEW MARKETS COMMITTEE MEETING DETAILS

Meeting Details	Agenda Item #"	Topic	Presenter	Action Item
Meeting Agenda	1.	Welcome	John Gill	
mooting / tgonaa	2.	Roll Call / Establishment of Quorum	Kaz Kasal	
Welcome	3.	Public Comment		
Roll Call	4.	Approval of Minutes A. 1/29/25 Revenue Diversity & New Markets	John Gill	X
Public Comment Approval of Minutes Information/ Discussion/ Action Items	5.	Information / Discussion / Action Items A. Results thru 5/28/25 B. Corporate Strategy C. FY 2025-26 Development Goals	Committee Review/Discussion	
Other Business Adjournment	6.	Other Business		
Adjournment	7.	Adjournment		



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WELCOME



Meeting Agenda

Welcome

Roll Call

Public Comment

Approval of Minutes

Information/

Discussion/

Action Items

Other Business

Adjournment

ROLLCAL



Meeting Agenda

Welcome

Roll Call

Public Comment

Approval of Minutes

Information/

Discussion/

Action Items

Other Business

Adjournment

PUBLIC COMMENT



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APPROVAL OF MINUTES





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Agenda Item 4A

DRAFT Revenue Diversity & New Markets Committee Meeting

Wednesday, January 29, 2025 3:00 p.m.

MINUTES

MEMBERS PRESENT: John Gill, Sharon Arroyo, Mark Brewer, and Snak Nakagawa

Joe Battista, Wendy Ford, Tanisha Gary and Michelle Sperzel MEMBERS ABSENT:

Leo Alvarez, Marcela DeFaria, Tadar Muhammad, Nilda Blanco, Vince Bruno, and Kaz Kasal STAFF PRESENT:

Agenda Item	Topic	Action Item / Follow Up Item
2	Welcome Mr. Gill, Committee Chair, called the meeting to order at 3:04 p.m. Roll Call / Establishment of Quorum Ms. Kasal reported a quorum present.	
3	Public Comment None offered.	
4	Action Item Approval of Minutes Reviewed draft minutes from 10/1/24 Revenue Diversity and New Markets Committee Meeting (attachment).	A motion was made by Mr. Brewer to approve the minutes <u>from</u> the 10/1/24 meeting. Mr. Nakagawa seconded; motion passed unanimously.
5	Information / Discussion / Action Items FY 2024-2025 Mid-Year Results Reviewed mid-year activities and results by funding source for FY 2024-2025, 7/1/24 thru 12/31/24 (attachment). Currently at 84% (\$5M) of annual \$6M goal. Committee input: 1) Be sure to clarify so Board understands that annual contribution goal is by CSCF PY vs. calendar year.	
	 Overview of Development Plan Reviewed CSCF's development plan to strategically diversify revenue and ensure long-term financial stability (attachment), to include following highlights: Revenue diversification in three buckets: Public Funding: CSCF is doing well with compliance and usually on top of list to receive additional funds. Private Funding: over time, as CSCF gets more efficient at "C-Planning," attainment of funds will accelerate. CSCF's positive track record with its successful programs and great 	



	record with its successful programs and great impact within the community will be a testament and incentive for more private funders to invest. 3) Revenue-generating: with the new government rule requiring contact with TTW customers must be maintained after 90 days, CSCF is being proactive by attaining contact list from Social Security Administration for outreach. Hiring a temp might be an option with outreach. Upcoming Enhancements: Launch of Donations page on CSCF website. Utilization of CRM to track and better manage donations. Strategic Investment Policy Update Mr. Alvarez, CFO, relayed that Finance Committee concurred to amend its charter to include oversight of reserve "investment" account as part of their responsibility. Finance Committee also directed staff to: Draft policy on CSCF's portfolio investment account for Finance Committee review. Proceed with an RFP (Request Eor Proposals) for Brokers that manage the investment accounts. After evaluating proposals received, staff to provide Finance Committee with recommendations. Committee feedback: Keep reserve account as liquid as can be. Investment policy – keep simple. Primary focus is to grow account, but can be available to: bridge gaps in funds, as operations reserve for x number of months, or for programs with Board approval	
7	Other Business	
8	None offered. Adjournment	
0	There being no other business, the meeting was adjourned at 4:28 p.m.	

Respectfully submitted,

Kaz Kasal Executive Board Coordinator



Meeting Agenda

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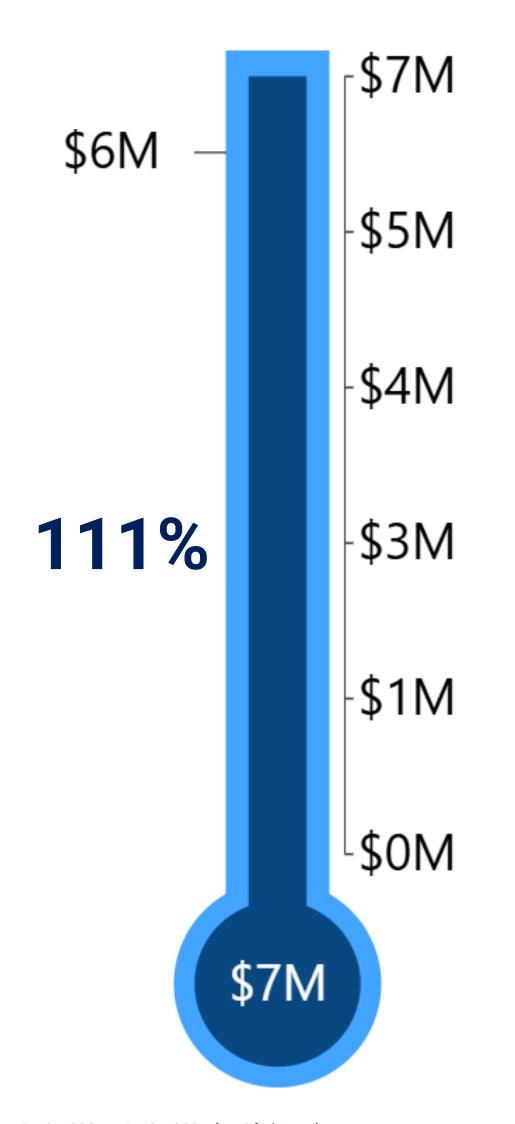
Adjournment

INFORMATION/ DISCUSSION/ ACTION ITEMS



FY 2024–2025 RESULTS THRU 5-28-25

ATTAINMENT/REQUESTED



\$6,680,158
ATTAINMENT

20 FUNDERS \$10,225,408
REQUESTED

34 SOLICITATIONS



TOP FUNDED PROGRAMS



DEVELOPMENT QUICK FACTS 2024-25

92% BOARD GIVING PARTICIPATION \$6 MILLION GOAL \$6,680,158 ATTAINED

CURRENT FY SPECIAL GRANTS AWARDED

Funder	Amount	Funding Duration	Designation
AdventHealth	\$350,000.00	01/01/25-12/31/26	Community Health Workers
Central Florida Hotel and Lodging Association	\$5,000.00	06/01/25-07/31/25	SYP Hospitality Support
City of Orlando	\$50,000	01/01/25-12/31/25	ESOL programs
Disney	\$20,000.00	07/01/24-06/30/25	HSCE
Duke Energy	\$30,000.00	01/01/25-12/31/25	HSCE
Fairwinds Foundation	\$25,000.00	01/01/25-12/31/25	SYP Financial Literacy
JPMorgan Chase	\$500,000.00	09/01/24-12/31/26	Semi-conductor Programs
Osceola County	\$150,000	10/01/24-09/30/25	ESOL programs
United Way of Lake and Sumter Counties	\$32,000.00	01/01/25-12/31/25	HSCE in Lake & Sumter Counties



PENDING AND DECLINED

\$2,690,000
DECLINED AWARDS

\$664,000
PENDING CONTRACTS

\$627,000
PENDING DECISION

- AdventHealth (2nd grant)
- Truist
- Orange County Public Schools
- iDrive Community
 Reinvestment Agency
- City of Kissimmee
- Lake County Gov.

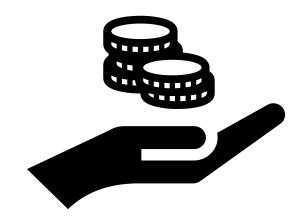
- Bank of America
- Citi Foundation
- Orl. Sanford Intl. Airport



BOARD GIVING BY SOURCE

\$601,877

PLEDGED



\$595,000

BOARD-DRIVEN CONTRIBUTIONS

\$6,877
INDIVIDUAL GIFTS



BOARD GIVING: CASH PLEDGES

FUNDER	AMOUNT	
AdventHealth	\$350,000	
Seminole County	\$130,000	
City of Orlando	\$50,000	
Duke Energy	\$30,000	
Fairwinds Credit Union	\$25,000	
Heart of Florida United Way	\$10,000	
Individual Gifts	\$6,877	
TOTAL PLEDGED	\$601,877	



BOARD GIVING

92%

8%

TOTAL MEMBERS CONTRIBUTED

NOT CONTRIBUTED



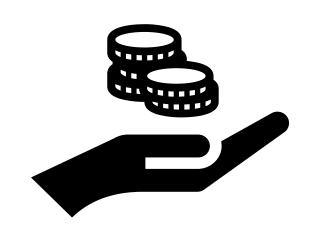
TICKET TO WORK PROGRAM

\$275,000

REVENUE GOAL

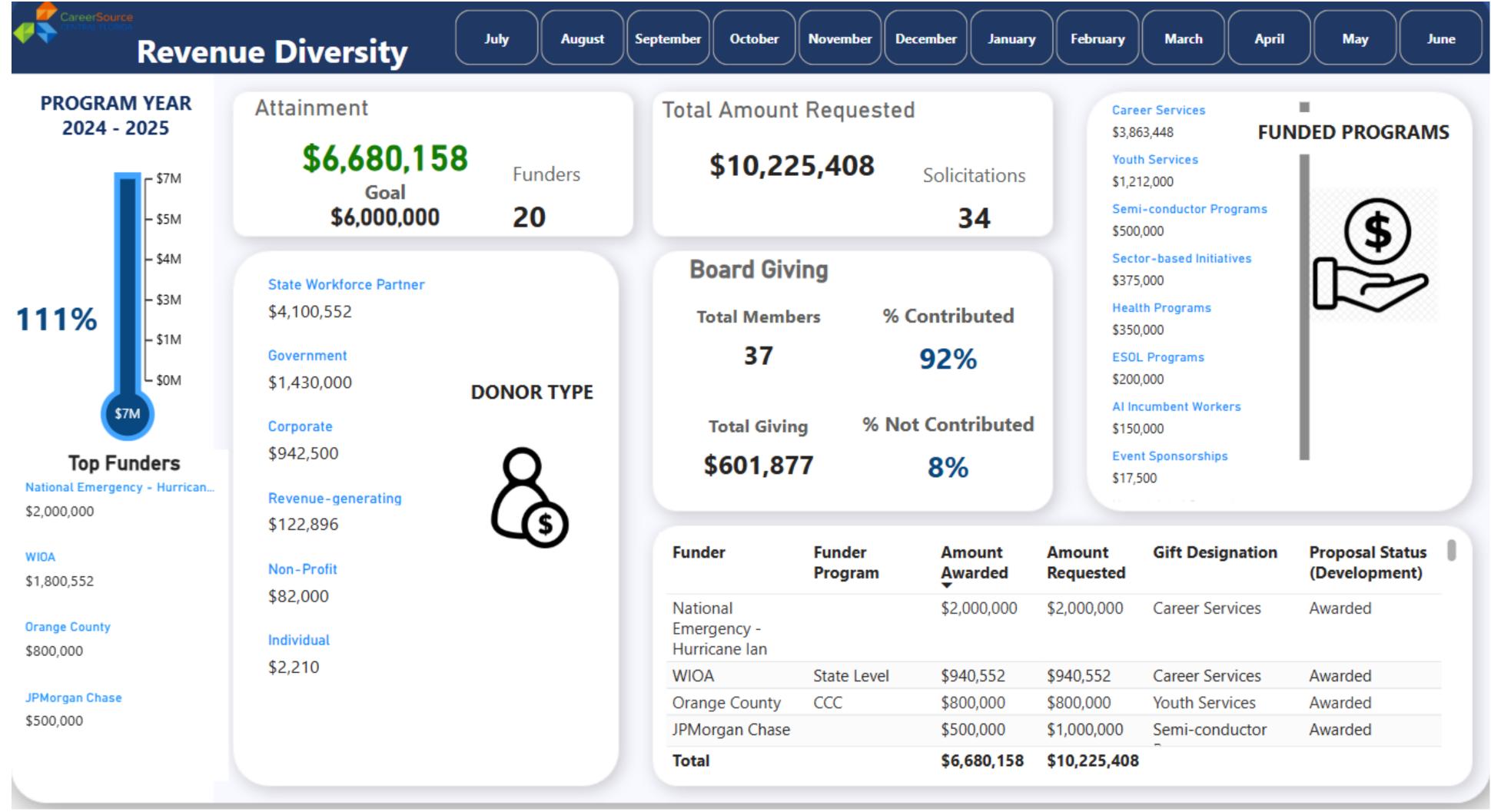
\$119,146

RECEIVED





DEVELOPMENT DASHBOARD

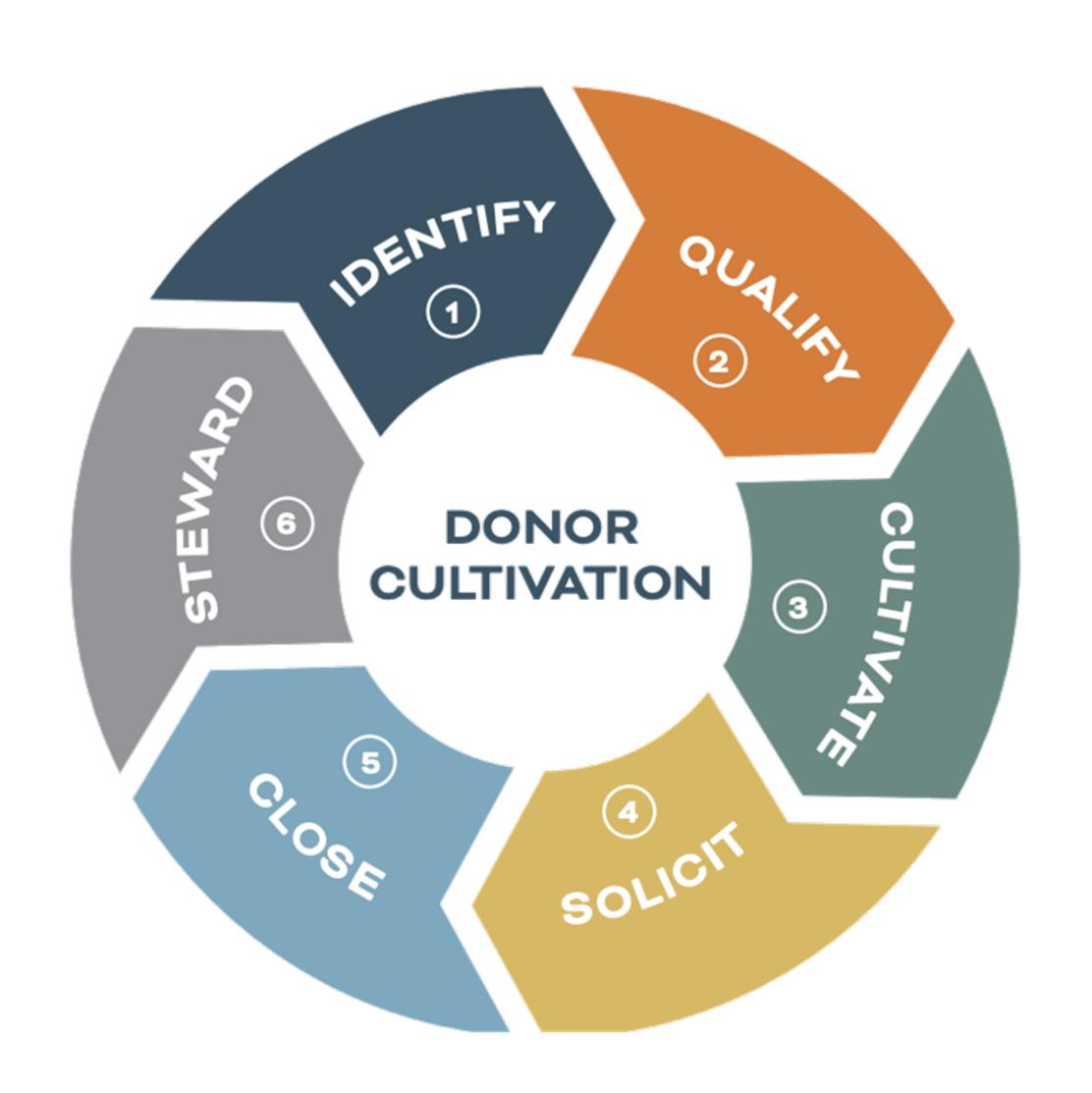






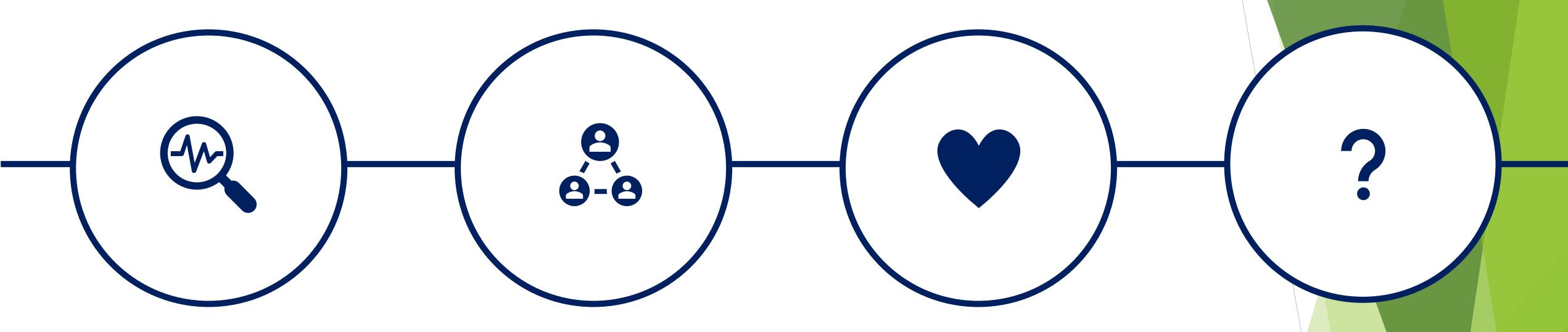
CORPORATE PROSPECTING STRATEGY

DONOR CYCLE





CORPORATE STRATEGY



RESEARCH & IDENTIFICATION

990 forms
ChatGPT/AI
CSR Pillars, CRAs
iWave wealth screening
Letters to Shareholders
OBJ & Orlando Sentinel
Public reports

DISCOVERY & NEEDS ASSESSMENT

Direct outreach
Leverage our networks
LinkedIn
Networking & Business events

CULTIVATION & STEWARDSHIP

Communications plan
Engage in conversations
Engagement at CSCF
Influencers/Decision Makers
Learn their processes
Reward commitment
Show impact

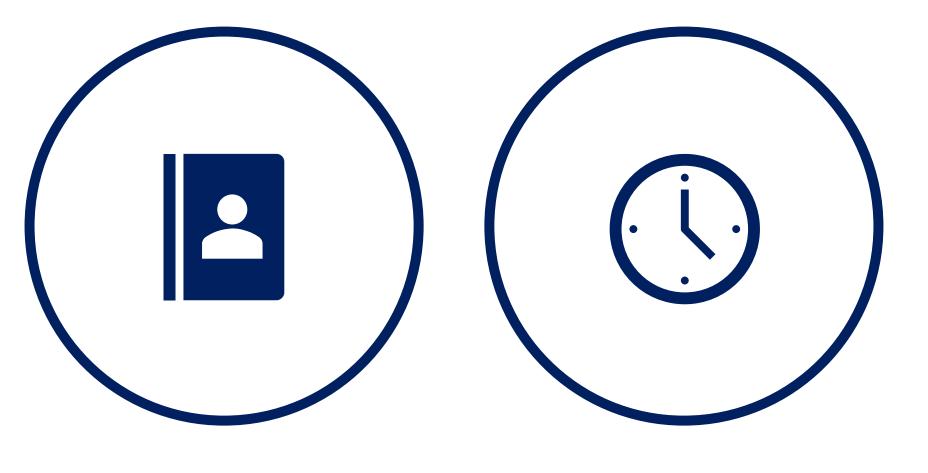
SOLICITATION

Assess/vet opportunities
Identify mutual goals
Grant applications
Verbal conversations

CORPORATE STRATEGY CADENCE

WEEKLY

Prospecting/Research
Prospecting Summaries
Track Solicitations & Awards



BIWEEKLY

Development Updates

CRM contact reports*

Discovery & Cultivation Meetings

MONTHLY

Engagement Opportunities

Networking events

Relationship Mapping





QUARTERLY

Exec Team Corporate Strategy
Review & Brainstorming
Solicitations

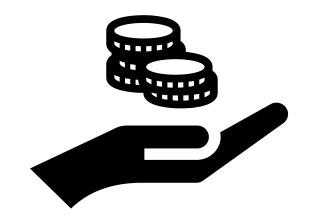


FY 2025–2026 GOALS

FY 2025-26 GOALS

\$5,000,000

ATTAINMENT



\$7,000,000
PROJECTED PROPOSAL TOTALS

\$3,000,000
STATE FUNDING OPPORTUNITIES





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OTHER BUSINESS - UPDATE ON CAREER SOLUTIONS



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ADJOURNMENT





or in person by appointment, in your place of business or at one of our Career Centers.







THANKYOU

www.CareerSourceCentralFlorida.com 800.757.4598