

**PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS
BOARD APPOINTMENT SUMMARY**

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Meeting Date: May 14, 2024

Department
Submitted By: Community Services
Advisory Board: Community Action Advisory Board
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I. EXECUTIVE BRIEF

Motion and Title: Staff recommends motion to approve: the appointment of one (1) new member to the Community Action Advisory Board (CAAB), effective May 14, 2024:

<u>Seat No.</u>	<u>Appointment</u>	<u>Seat Requirement</u>	<u>Term Ending</u>	<u>Nominated By</u>
8	Victoria Anastasi	Private Sector Representative- Banking and Finance	07/11/2025	CAAB

Summary: The Community Action Block Grant (CSBG) agreement requires the establishment of a CAAB which is to participate in the planning, implementation, and evaluation of CSBG programs to serve low-income communities. Community Action Agencies (CAA) were created in the Economic Opportunity Act of 1964 on the premise that local citizens were the most knowledgeable and best equipped to address problems of poverty in their communities. Each CAA is governed by a board of no more than 15 directors and/or their designees. Membership consists of one-third elected public officials or their representatives, one-third private sector members recommended by the CAAB, and one-third low-income representatives who are selected through a democratic process within the targeted neighborhoods. This board structure is defined by federal statute and is known as a tripartite board. Board Members will fully participate and provide voice for the Community Services Block Grant (CSBG) programs created to serve low-income communities. Florida Department of Commerce, is the primary conduit to receive and disperse these federal funds to the local agency. The Agency then provides services, assistance, and other activities of sufficient scope and size to low-income individuals and families throughout Palm Beach County to give promise of progress toward elimination of poverty or a cause or causes of poverty through developing employment opportunities, improving human performance, motivation, and productivity, or bettering the conditions under which people live, learn, and work. Per Resolution No. R-2018-0372, adopted April 10, 2018, amending Resolution No. R-2014-0588.

Ms. Anastasi will complete the "private-sector finance" term of Alesia Keller who resigned from the board. Ms. Anastasi meets all applicable guidelines and requirements outlined in the resolution. The diversity count for the 12 seats that are currently filled is African-American: 8 (66%); Caucasian: 3 (25%); and Hispanic-American: 1 (9%). The gender ratio (female: male) is 7:5. Ms. Anastasi is Caucasian. Staff is addressing the need to increase diversity within our boards and will continue to encourage this to expand this Board's diversity." (Community Action Program) Countywide (HH)

Background and Justification: The Board of County Commissioners first created a Community Action Council Advisory Board in 1974. This was done to qualify the Agency to receive CSBG funds for the residents of Palm Beach County. The CSBG agreement requires the establishment of a Community Action Advisory Board and that CAAB participates in the planning, implementation, and evaluation of CSBG programs to serve low-income communities.

- Attachments:**
1. Board/Committee Application and Resume
 2. Inventory of Seats List
 3. Resolution No. R-2018-0372

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 Recommended By: James E. Green 4/30/2024
DocuSigned by:
BF34EF22BDFDF492
 Department Director Date

Legal Sufficiency: [Signature] 5/10/24
 Assistant County Attorney Date

REVIEW COMMENTS

A. Other Department Review:

Department Director

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

Fiscal Years	2018	2019	2020	2021	2022
Capital Expenditures					
Operating Costs	0	0			
External Revenue	0	0			
Program Income					
In-Kind Match (County)					
NET FISCAL IMPACT	0	0			

# ADDITIONAL FTE POSITIONS (Cumulative)					
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Is Item Included In Current Budget: Yes _____ No X
 Does this item include the use of federal funds? Yes _____ No X

B. Recommended Sources of Funds/Summary of Fiscal Impact:
 No County funds are required.

C. Departmental Fiscal Review: J.E.A.
 For Julie Dowe, Director of Finance and Support Services

III. REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Development and Control Comments:

Lisa P. ... 3/28/18
 OFMB 826 3/21
J. J. Jacobson 3/28/18
 Contract Development and Control
 3/28/18

B. Legal Sufficiency:

Debra ...
 Assistant County Attorney

C. Other Department Review:

 Department Director

This summary is not to be used as a basis for payment.

RESOLUTION NO. R-2018-0372

RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS OF PALM BEACH COUNTY, FLORIDA, AMENDING R-2014-0588, PROVIDING FOR QUARTERLY MEETINGS OF THE COMMUNITY ACTION ADVISORY BOARD, PROVIDING FOR AMENDED ATTENDANCE POLICY, AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the Palm Beach County Board of County Commissioners established the Community Action Council Advisory Board (Board) in 1974 to qualify Palm Beach County to receive Community Service Block Grant Funds; and

WHEREAS, the Board's membership was reconstituted pursuant to Ordinance No. 04-042, and on September 15, 2009, Ordinance No. 04-042 was replaced by Resolution 2009-1549, which established the Community Action Advisory Board (CAAB) and reduced CAAB's membership from 23 to 15; and

WHEREAS, on May 6, 2014, Resolution 2009-1549 was repealed and replaced with Resolution 2014-0588, which clarified the process for nominating and selecting members to serve on the CAAB, and updated various standard provisions to comply with County advisory board policy; and

WHEREAS, Resolution 2014-0588 provides that the CAAB shall meet "a minimum of ten (10) times a year"; and

WHEREAS, other Counties within Florida have adopted a model of quarterly meetings for Community Action Program advisory boards such as CAAB, which has proven effective to allow greater focus on board members' responsibilities to participate in implementation of programs designed to serve the poor or low income citizens of the County, while still allowing an opportunity to make recommendations concerning program plans, priorities, and budgets.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF PALM BEACH COUNTY, FLORIDA, that:

1. The foregoing recitals are true and correct and are expressly incorporated herein by reference and made a part hereof.
2. Section 12: Meetings, paragraph A., of R-2014-0588 is amended to read in its entirety: The Advisory Board shall meet a minimum of four (4) times per program year; however, members may be required to

attend additional meetings.

a. The second sentence of Section 14: Removal for Lack of Attendance, of R-2014-0588 is amended to read:

Lack of attendance is defined as failure to attend three (3) consecutive meetings or failure to attend one-half of the meetings scheduled during a program year.

3. This resolution shall become effective upon adoption.

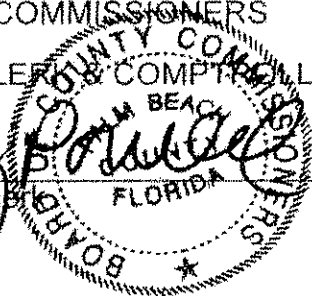
The foregoing Resolution was offered by Commissioner Burdick, who moved its adoption. The motion was seconded by Commissioner Bernard, and upon being put to a vote, the vote was as follows:

Commissioner Melissa McKinlay, Mayor -	Aye
Commissioner Mack Bernard, Vice Mayor-	Aye
Commissioner Hal R. Valeche -	Aye
Commissioner Paulette Burdick -	Aye
Commissioner Dave Kerner -	Aye
Commissioner Steven L. Abrams -	Aye
Commissioner Mary Lou Berger -	Aye

The Mayor thereupon declared the Resolution duly passed and adopted this 10th day of April, 2018.

PALM BEACH COUNTY, FLORIDA, BY ITS BOARD OF COUNTY COMMISSIONERS
SHARON R. BOCK, CLERK & COMPTROLLER

By: [Signature]
Deputy Clerk



APPROVED AS TO FORM AND LEGAL SUFFICIENCY

By: [Signature]
County Attorney

RESOLUTION NO. R-2014-0588

A RESOLUTION OF THE BOARD OF COUNTY COMMISSIONERS OF PALM BEACH COUNTY, FLORIDA, DESIGNATING THE BOARD OF COUNTY COMMISSIONERS AS THE COMMUNITY ACTION COUNCIL. ESTABLISHING THE COMMUNITY ACTION ADVISORY BOARD; DESIGNATING THE COMMUNITY ACTION ADVISORY BOARD AS THE COMMUNITY SERVICES BLOCK GRANT ADVISORY COMMITTEE. PROVIDING FOR ROLES AND RESPONSIBILITIES; PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, the U.S. Department of Health and Human Services (HHS) requires that recipients of Community Services Block Grant (CSBG) funds comply with the Community Opportunities, Accountability, and Training and Educational Services Act of 1996, as amended; and

WHEREAS, Section 676B, (b)(1) of that Act requires that a public entity administer the program through a tripartite board composed of members representing the public, private, and low income sectors of the community; and

WHEREAS, the Community Services Block Grant provides funds for the reduction of poverty, the revitalization of low-income communities, and the empowerment of low-income families and individuals to become fully self-sufficient; and

WHEREAS, Palm Beach County through the Department of Community Services wishes to comply with HHS requirements regarding the Community Action Advisory Board; and

WHEREAS, the Board of County Commissioners was previously designated as the Community Action Council and the grantee for the CSBG program through ordinances 74-20 and 04-042, which have been repealed; and

WHEREAS, pursuant to ordinances 74-20 and 04-042, a Community Action Council Administering Board was established.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COUNTY COMMISSIONERS OF PALM BEACH COUNTY, FLORIDA, as follows:

SECTION 1: DESIGNATION OF THE BOARD OF COUNTY COMMISSIONERS AS THE COMMUNITY ACTION COUNCIL AND CSBG GRANTEE

The Board of County Commissioners is hereby designated as the Community Action Council and the grantee of CSBG funding received by Palm Beach County.

SECTION 2: ESTABLISHMENT OF THE COMMUNITY ACTION ADVISORY BOARD AND DESIGNATION AS THE CSBG ADVISORY COMMITTEE

There is hereby established an advisory board to be known as the Community Action Advisory Board, herein referred to as the "Advisory Board." Said Advisory Board is also designated as the Community Services Block Grant Advisory Committee pursuant to the CSBG guidelines of the State of Florida Department of Economic Opportunity.

SECTION 3: COMPOSITION

A. The Advisory Board shall be comprised of fifteen (15) members, as follows:

- 1) One-third (1/3) of the members of the Advisory Board shall be elected public officials holding office on the date of selection, or their representatives. A letter reaffirming agreement to serve as an Advisory Board member or delegation to a representative, signed by the elected official, shall be required each year until the official's elective term ends.
- 2) Not fewer than one-third (1/3) of the members of the Advisory Board shall be persons chosen in accordance with democratic selection procedures adequate to assure that they are representatives of low income individuals and families in the target neighborhood served. Each representative of the low-income sector selected to represent a specific target neighborhood within the community must reside in the neighborhood served. The county will define what constitutes a target neighborhood.
- 3) The remainder of the members of the Advisory Board shall be persons who can bring pertinent and significant resources from the private sector to the Community Action mission of assisting low income persons to acquire greater control over their lives and to increase their degree of self-sufficiency.

SECTION 4: APPOINTMENTS, TERMS, VACANCIES AND COMPOSITIONS

- A. All members of the Advisory Board shall be residents of Palm Beach County, Florida at the time of appointment and while serving on the Advisory Board.
- B. Terms of office for the Advisory Board members shall be three (3) year terms. An individual may serve three (3) consecutive full terms. Terms shall begin on October 1 and end on September 30.
- C. Terms shall be staggered such that one-third (1/3) of the advisory board members shall be selected each year.
- D. Nominations shall be requested by County staff upon adoption of this resolution and generally every year thereafter in a manner that will provide for appointment or reappointment prior to the term expiration. The public sector members are appointed by the Board of County Commissioners, a democratic selection process will be held to fill seats from the low-income sector, the Advisory Board will recommend individuals to fill the seats for the private sector. All nominations shall be approved by the Board of County Commissioners.
- E. A vacancy occurring during a term shall be filled for the unexpired term and in the manner prescribed above.
- F. All Advisory Board members serve at the pleasure of the Board of County Commissioners.
- G. Members appointed pursuant to Section 3.A1 will no longer be eligible to serve on the advisory Board if they, or the elected official they represent, no longer hold elected public office.

SECTION 5: AUTHORITY

- A. The Advisory Board shall have the authority and power to advise the Board of County Commissioners on the development, planning, implementation and evaluation of the CSBG program to serve low-income communities.
- B. Members shall be subject to the rules and procedures of the Advisory Board, if rules and procedures are created, and to the overall authority of the Board of County Commissioners of Palm Beach County, Florida.

SECTION 6: SUNSHINE LAW AND STATE CODE OF ETHICS

The Advisory Board must comply with the Sunshine Law and State Code of Ethics. Reasonable public notice of all board meetings shall be provided. All meetings of the board shall be open to the public at all times and minutes shall be taken at each meeting.

SECTION 7: PALM BEACH COUNTY CODE OF ETHICS

Advisory Board members are to comply with the applicable provisions of the Palm Beach County Code of Ethics as codified in Section 2-254 through 2-260 of the Palm Beach County Code.

SECTION 8: TRAVEL EXPENSES, REIMBURSEMENT AND APPROVAL AUTHORITY

Travel reimbursement is limited to expenses incurred only for travel outside Palm Beach County necessary to fulfill board member responsibilities when sufficient funds have been budgeted and are available as set forth in PPM CW-O-038. No other expenses are reimbursable except documented long distance phone calls to the liaison County department. Approval authority for pre-authorized board member travel is designated to the County Administrator and Deputy County Administrator and shall be in accordance with PPM CW-F-009.

SECTION 9: ELIGIBILITY TO SERVE

County employees, other than Commissioners Aides, are not eligible to serve on the Advisory Board unless the County employee is an elected official within Palm Beach County and is nominated for inclusion on the board by an entity other than the Board of County Commissioners. Employees of other units of local government may not represent their respective governments on boards, unless otherwise provided by statute or other rule of law. Former Board of County Commissioners members may not be appointed to the Advisory Board for at least two (2) years following their last day in office as a County Commissioner.

SECTION 10: QUALIFICATION AS A CANDIDATE

Advisory Board members shall not be prohibited from qualifying as a candidate for elected office.

SECTION 11: RESPONSIBILITIES

The responsibilities of the Community Action Advisory Board shall include the following:

- A. Conduct regular assessments of the circumstances of low income individuals and families and of the resources available and needed in the community to support movement by low income persons toward greater self-sufficiency;
- B. Create a forum for citizen participation that maximizes participation of those served so as to best stimulate and take full advantage of capabilities for self-advancement and assure that programs and projects are meaningful to and widely utilized by their intended beneficiaries;
- C. Participate fully in the development and implementation of programs and projects designed to serve the poor or low income citizens of the county;
- D. Review and recommend programs and projects for the use of the CSBG funds;
- E. Foster and promote cooperation between governmental agencies, community-based non-governmental non-profit organizations and business interests in order to achieve the goals and outcomes of community action plans;
- F. Submit an annual report to the board of county commissioners on activities undertaken and accomplishments made during the preceding year;
- G. Receive reasonable advance notice of, and an opportunity to make recommendations, concerning:
 - 1) Appointment of the program coordinator;
 - 2) Determination of overall program plans and priorities;
 - 3) Approval of program proposals and budgets;
 - 4) Enforcement of compliance with all conditions of federal and state grants;
 - 5) Corrective measures to remove roadblocks affecting program implementation;
 - 6) Determination, subject to federal, state, and local regulations and policies, of rules of procedure for the advisory board;
 - 7) Any changes to this Resolution. In the event that the Advisory Board determines a public meeting is necessary to address any changes to this Resolution, said public meeting will be arranged prior to submission of any such change to the board of county commissioners.
- H. To perform such other duties as may be from time to time assigned by the Board of County Commissioners.

SECTION 12: MEETINGS

- A. The Advisory Board shall meet a minimum of ten (10) times a year; however, members may be required to attend additional meetings.
- B. A majority of the members appointed shall constitute a quorum for the conduct of the Advisory Board's business.
- C. In the presence of a quorum, Advisory Board business shall be conducted by a vote of a majority present and be governed by Robert's Rules of Order.
- D. The Chair shall have the authority to call emergency meetings, as is needed and appropriate, by informing members at least three days in advance.
- E. Public notice of all Advisory Board meetings shall be provided consistent with the requirements of the Florida Department of Community Affairs and Florida laws, and all such meetings shall be open to the public at all times.

SECTION 13: OFFICERS

A chair, vice-chair, and secretary shall be elected by a majority vote of the administering board and shall serve for a term of one (1) year, but not to exceed two (2) consecutive terms in any one (1) office.

A. Duties of the Chair:

- 1) Call and set the agenda for Advisory Board meetings;
- 2) Preside at Advisory Board meetings;
- 3) Establish committees, appoint committee chairs and charge committees with specific tasks;
- 4) Serve as primary liaison with program staff; and
- 5) Perform other functions as the Advisory Board may assign by rule or order.

- B. The Vice Chair shall perform the duties of the Chair in the Chair's absence, and such other duties as the Chair may assign.
- C. The Secretary shall be responsible for Board record-keeping and documentation.

Vacancies in any officer position shall be filled for the remainder of the term by the Advisory Board.

SECTION 14: REMOVAL FOR LACK OF ATTENDANCE

Members of the Advisory Board shall be automatically removed for lack of attendance. Lack of attendance is defined as failure to attend three (3) consecutive meetings or failure to attend more than one-half of the meetings scheduled during a program year. Participation for less than three-fourths of a meeting shall constitute lack of attendance. Members removed under this paragraph shall not continue to serve until a new appointment is made and removal shall create a vacancy.

SECTION 15: EFFECTIVE DATE

This Resolution shall become effective upon approval by a majority vote of the Board of County Commissioners, Palm Beach County, Florida.

The foregoing Resolution was offered by Commissioner Burdick, who moved its adoption. The motion was seconded by Commissioner Abrams, and upon being put to a vote, the vote was as follows:

Commissioner Priscilla A. Taylor, Mayor	<u> Aye </u>
Commissioner Paulette Burdick, Vice Mayor	<u> Aye </u>
Commissioner Hal R. Valeche	<u> Aye </u>
Commissioner Shelley Vana	<u> Aye </u>
Commissioner Steven L. Abrams	<u> Aye </u>
Commissioner Mary Lou Berger	<u> Aye </u>
Commissioner Jess R. Santamaria	<u> Aye </u>

The Mayor thereupon declared the Resolution duly passed and adopted this 6th day of May, 2014.

APPROVED AS TO FORM AND
LEGAL SUFFICIENCY

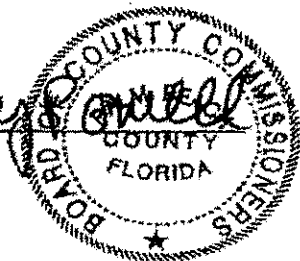
ATTEST:
SHARON R. BOCK,
CLERK & COMPTROLLER

BY: 

Tammy K. Fields
Sr. Assistant County Attorney

BY: 

Deputy Clerk



**PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS
BOARDS/COMMITTEES APPLICATION**

The information provided on this form will be used in considering your nomination. Please **COMPLETE SECTION II IN FULL**. Answer "none" or "not applicable" where appropriate. Please attach a biography or résumé to this form.

Section I (Department): (Please Print)

Board Name: Community Action Advisory Board (CAAB) Advisory Not Advisory

At Large Appointment or District Appointment / District #: _____

Term of Appointment: 1.5 Years. From: 3/04/2024 To: 7/11/2025

Seat Requirement: Private Sector- Finance and Banking Seat #: 8

*Reappointment or New Appointment

or to complete the term of Alesia Keller Due to: resignation other

Completion of term to expire on: 7/11/2025

*When a person is being considered for reappointment, the number of previous disclosed voting conflicts during the previous term shall be considered by the Board of County Commissioners: 1

Section II (Applicant): (Please Print)

APPLICANT, UNLESS EXEMPTED, MUST BE A COUNTY RESIDENT

Name: Anastasi Victoria
Last First Middle

Occupation/Affiliation: Branch Manager- Regions Bank
Owner Employee Officer

Business Name: Regions Bank

Business Address: 19645 US Highway 441

City & State: Boca Raton, FL Zip Code: 33498

Residence Address: 1019 Grove Park Circle

City & State: Boynton Beach, FL Zip Code: 33436

Home Phone: () Business Phone: (561) 334-5950 Ext. _____

Cell Phone: (561) 810-9700 Fax: ()

Email Address: Victoria.anastasi@regions.com

Mailing Address Preference: Business Residence

Have you ever been convicted of a felony: Yes _____ No X

If Yes, state the court, nature of offense, disposition of case and date: _____

Minority Identification Code: Male Female
 Native-American Hispanic-American Asian-American African-American Caucasian

Section II Continued:

CONTRACTUAL RELATIONSHIPS: Pursuant to Article XIII, Sec. 2-443 of the Palm Beach County Code of Ethics, advisory board members are prohibited from entering into any contract or other transaction for goods or services with Palm Beach County. Exceptions to this prohibition include awards made under sealed competitive bids, certain emergency and sole source purchases, and transactions that do not exceed \$500 per year in aggregate. These exemptions are described in the Code. This prohibition does not apply when the advisory board member's board provides no regulation, oversight, management, or policy-setting recommendations regarding the subject contract or transaction and the contract or transaction is disclosed at a public meeting of the Board of County Commissioners. To determine compliance with this provision, it is necessary that you, as a board member applicant, identify all contractual relationships between Palm Beach County government and you as an individual, directly or indirectly, or your employer or business. This information should be provided in the space below. If there are no contracts or transactions to report, please verify that none exist. Staff will review this information and determine if you are eligible to serve or if you may be eligible for an exception or waiver pursuant to the code.

<u>Contract/Transaction No.</u>	<u>Department/Division</u>	<u>Description of Services</u>	<u>Term</u>
<u>Example: (R#XX-XX/PO XX)</u>	<u>Parks & Recreation</u>	<u>General Maintenance</u>	<u>10/01/00-09/30/2100</u>
_____	_____	_____	_____
_____	_____	_____	_____

(Attach Additional Sheet(s), if necessary)
OR

NONE

NOT APPLICABLE/
(Governmental Entity)

ETHICS TRAINING: All board members are required to read and complete training on Article XIII of the Palm Beach Code, the Palm Beach County Code of Ethics. Training on the Palm Beach County Code of Ethics can be found on the web at: <http://www.palmbeachcountyethics.com/training.htm>. Ethics training is on-going, and pursuant to PPM CW-P-80 is required before appointment, and upon reappointment. All board members must also be familiar with the State of Florida Code of Ethics, (Chapter 112, part III of the Florida Statutes), and the Florida Sunshine Law.

By signing below I agree to abide by the Palm Beach County Code of Ethics, and acknowledge that I have received the required Ethics training (in the manner checked below):

By watching the training program on the Web, DVD or VHS on Jan 11, 2024
 By attending a live presentation given on _____, 20____

AND

By signing below I acknowledge that I have read, understand and agree to abide by the Florida Sunshine Law and the State of Florida Code of Ethics, Chapter 112, part III of the Florida Statutes:

*Applicant's Signature: Victoria Anastasi Printed Name: Victoria Anastasi Date: Jan 11, 2024

Any questions and/or concerns regarding Article XIII of the Palm Beach County Code of Ethics, please visit the Commission on Ethics website www.palmbeachcountyethics.com or contact us via email at ethics@palmbeachcountyethics.com or (561) 233-0724.

Return this FORM to:
{Insert Liaison Name Here}, {Insert Department/Division Here}
{Insert Address Here}

Section III (Commissioner, if applicable):

Appointment to be made at BCC Meeting on: _____

Commissioner's Signature: _____ Date: _____

Pursuant to Florida's Public Records Law, this document may be reviewed and photocopied by members of the public.

Revised 01/09/2023

Victoria Anastasi

Cell: (561) 810-9700
Boynton Beach, FL
victoria.anastasi@outlook.com

LICENSES & CERTIFICATIONS

- Florida 2-15 License - Resident Life Including Variable Annuity and Health
- Florida Public Notary

EXPERIENCE

Regions Bank

Boca Raton, FL

5/21 – 5/23

Branch Manager – Vice President

- Educates associates, customers, and surrounding community about best practices to achieve and maintain financial wellness in addition to emerging bank technology and digital solutions such as mobile, online and ATM offerings, all designed to make banking easier. Conduct financial literacy seminars.
- Educates and advises customers on Regions Consumer and Business products and services, including all loan and deposit types in addition to assisting with annuities and life insurance.
- Resolves escalated customer and associate issues and provides counseling to associates as needed with limited guidance and direction from senior leadership and Human Resources.
- Manages recruiting and selection process for assigned branch.
- Maintains relationships with Line of Business partners and refers customers to an internal team of experts when additional complex financial goals and needs are recognized.
- Follows all bank policies, processes, procedures, and internal audit requirements and adheres to applicable laws and regulations, including completing individual duties specific to the role of Branch Manager, and ensures all associates in the branch complete their delegated operational risk management duties as assigned; as a member of the branch team, ensures sound banking practices, including managing, identifying, and reporting operational risks.

Valley Bank

Admirals Cove – Jupiter & Palm Beach

5/21 – 5/23

Regional Service Excellence Manager

- Maintain a true Concierge Service by extending the relationship to become a trusted partner for client needs that fall outside the traditional banking relationship
- Open new personal and business accounts such as checking, savings, CDs and IRAs, discusses/sells loan products to existing and prospective clients. Educates clients about digital solutions and assists with set up
- Discuss business solutions such as ADP, Treasury Management and Merchant Solutions to current and new business account holders
- Perform transactions required by clients and use appropriate technology to provide services most effectively and efficiently. Maintains and balances a cash box. Utilizes technology such as Teller Scanning Equipment, Cash Recycling and Cash Dispensing machines
- Runs all aspects of the branch including all managerial and banker responsibilities
- Attends various networking events to build CIO and client base. Volunteers with multiple organizations and is an active Board/Committee Member

TD Bank

South Florida Market

2/18 – 5/21

Business Development Specialist – Off-site Events

- Processed PPP/SBA loans in Salesforce nCino. Direct client interaction through PPP loan process
- Validated borrower provided information, auditing, ensured that it is complete and accurate, before processing
- Conducted Off-site Events with individual Store employees to coach them on how to run their own successful events

Internal Use

- Met with individual business owners to present Bank at Work and Affinity Program presentations
- Cross sold various banking products and services to businesses and consumers
- Supported the South Florida Region - 80+ stores. Acted on leads that turned into Off-site Events
- Knowledgeable of Bank Product Lines, Services, Store Operations and Security
- Proven business development skills, including the ability to conceptualize and implement strategies
- Cold canvassing and warm business calling resulted in successful Off-site Events
- Responsible for mentoring, coaching and training employees on various products and services including Off-site Event, sales opportunities and Financial Literacy across the whole Region
- Provided Financial Literacy from school aged children to adults in small and large settings
- Promoted TD Bank by having a strong attendance in community events, networking for business development opportunities which resulted in new business and personal relationships for the market
- Worked with product partners including Wealth. Continuously identified TDAT, Merchant Solution, Treasury Services, Paycor and Small Business referrals
- Frequent presenter for IM TD Workshops. Educated new employees about the benefits of banking with TD
- Attended and participate in Broward's monthly Commercial Pipeline meetings
- Mentored branch staff to identify sale opportunities and coach staff to obtain sales revenue goals
- Engaged with product partners for Merchant Services, Lending, and Wealth referrals leading to sales

Edward Jones Investments

Philadelphia, PA & Palm Beach Gardens, FL

3/17 – 1/18

Branch Office Manager

- Assisted Market Manger and Financial Advisors and with daily activities
- Scheduled and organized activities such as business meetings, travel requirements, event planning, coordination of personal appointments and personal correspondence
- Promoted the corporate image by representing the Market Manager internally and externally and ensured appropriate communication between key internal and external executives and colleagues
- Compiled content and published required materials on the company-wide intranet
- Supported the Market Manager in holding the Executive Leadership Team members accountable to timelines and commitments
- Responded to routine inquiries from internal and external clients. Referred problems to appropriate individuals when necessary; ensured answers or information is received by inquiring party; assisted in resolving problems using independent judgement within given authority
- Attendance at board and committee meetings for transcribing and preparation of minutes and maintaining exhibit files
- Placed stock orders, set up brackets and place special conditions on trade orders per financial advisors
- Supported multiple highly complex business processes and served as a functional leader
- Created, maintained and reviewed business process models, data flows, prototypes, business requirements, used cases and test cases

Victoria De Pasquale – Accounting & Business Solutions

Philadelphia

2/89 – Present

Accountant for various clients specializing in medical field and professional sports

- Prepare and file individual, corporation, partnership, non-profit and sales tax returns
- Provide consulting for Practice Acquisitions/Buy Sell Agreements
- Prepare Private Market Valuations and audits company financials for Buy/Sell Agreements
- Prepare trial balances and financial statements
- Responsible for day to day accounting, primarily utilizing QuickBooks
- Manage all accounts payable, accounts receivable, general ledger and expense control procedures including cash receipts, disbursements, finance charges, billings, purchase order, and chargebacks
- Prepare payroll and file payroll tax returns manually and electronically through Paychex and ADP
- Prepare all month and year end financial reports in QuickBooks
- Complete audit practices

PROFESSIONAL AFFILIATIONS

- **Kids of Love Foundation** Board Member (Specializing in Grant Writing and Special Events)
- **Broward Health Foundation** Committee Member (Event Planning and Fundraising)
- **Florida Career College** Advisory Board
- **Schoolhouse Children's Museum** Committee Co-Chair (Event Planning and Fundraising)
- **Various volunteer efforts**, including: Special Olympics, Habitat for Humanity, Mentorship with Boys & Girls Club and The Honda Classic

EDUCATION

University of Pennsylvania – Wharton Business School

- Business Economics and Public Policy
- Finance

Temple University

- Accounting



**PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS
COMMUNITY ACTION ADVISORY BOARD**

I. AUTHORITY :

Resolution R2014-0588, adopted May 6, 2014, repealing and replacing R2009-1549.

II. APPOINTING BODY :

Board of County Commissioners

III. COMPOSITION, QUALIFICATIONS, TERMS & REMOVAL :

The Advisory Board shall be comprised of fifteen members, as follows: One-Third shall be elected public officials holding office on the date of selection, or their representatives; not fewer than One-Third shall be person chosen in accordance with democratic selection procedures to assure that they are representatives of low-income individuals and families in the target neighborhood served; and the remainder shall be persons who can bring pertinent and significant resources from the private sector. Members must be Palm Beach County residents at the time of appointment and while serving. Members shall serve three year terms. An individual may serve three consecutive full terms. Terms shall begin on October 1 and end on September 30. A vacancy occurring during a term shall be filled for the unexpired term.

EXTENDED COMPOSITION :

IV. MEETINGS :

Third Tuesday of each month at 5:30 p.m. The location changes within the County. The announcement is broadcast on the PBC website, by public notice, and social media stations at least 10 calendar days in advance of each meeting.

V. FUNCTIONS :

Conduct regular assessments of the circumstances of low-income individuals and families and of the resources available in needed in the community to support greater self-sufficiency; create a forum for citizen participation; participate in the development and implementation of programs/projects designed to serve the low-income citizens; review and recommend programs/projects for use of the Community Services Block Grant funds; foster and promote cooperation between governmental agencies, community-based non-governmental non-profit organizations and businesses; submit annual report to the BCC.

VI. LIAISON INFORMATION :

LIAISON DEPARTMENT

Community Services

CONTACT PERSON

Adriane Marcelle

ADDRESS

Phone # 561-355-4791

* indicates a member having an action pending



COMMUNITY ACTION ADVISORY BOARD

SEAT ID	CURRENT MEMBER	ROLE TYPE	RACE CODE	GENDER	BUSINESS / HOME PHONE	SEAT REQUIREMENT	APPOINT DATE	REAPPOINT DATE	EXPIRE DATE
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Appointed By : At-Large/Palm Beach County Board of County Commissioners

1	Raynold Sam	Member	AA	M	--	Public Sector Representative	12/07/2021		09/30/2024
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Farmworker Coordinating Council of Palm Beach County, Inc. - B
233 W Avenue "A" Ste D
Belle Glade FL 33430 3092

NOMINATED BY : District 7 Commissioner

2	Vacant	Member				Public Sector Representative			
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NOMINATED BY :

3	Guillermo Carrasco	Member	HA	M	561-495-8971	Public Sector Representative	12/07/2021		09/30/2024
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4075 Laurel Wood Ln
Delray Beach FL 33445

NOMINATED BY : District 2 Commissioner

4	Steve West	Member	CA	M	--	Public Sector Representative	12/07/2021		09/30/2024
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steve@therationalmajority.org
The IN-CROWD
7264 Cataluna Cir
Delray Beach FL 33446

NOMINATED BY : District 7 Commissioner

* indicates a member having an action pending

Appointed By : At-Large/Palm Beach County Board of County Commissioners

5 Vacant Member Public Sector Representative /

NOMINATED BY :

6 Sandra Savoie Wright Member CA F 561-340-1060 Private Sector Representative 02/04/2020 10/04/2022 09/30/2025
swright@ccareersourcepbc.com X2424
CareerSource Palm Beach County - WPB Office
3400 Belvedere Rd
West Palm Beach FL 33406 1525

NOMINATED BY :

7 Linda Williams Member AA F -- Private Sector Representative 07/12/2022 07/11/2025
willialc@palmbeachstate.edu
Palm Beach State College-Lake Worth Campus
4200 Congress Ave
Lake Worth FL 33461

NOMINATED BY :

8 Vacant Member Private Sector Representative 07/11/2025

NOMINATED BY :

* indicates a member having an action pending

Appointed By : At-Large/Palm Beach County Board of County Commissioners

9 Carol Jones-Gilbert Member AA F 561-684-2160 Private Sector Representative 08/20/2019 07/12/2022 07/11/2025
cjones-gilbert@pbchaf1.org X104
Palm Beach County Housing Authority
3432 W 45th St
West Palm Beach FL 33407

NOMINATED BY :

10 Lisa Vreeland Member CA F -- Private Sector Representative 04/18/2023 09/30/2025
lisa.vreeland@flhealth.gov
Florida Department of Health-PBC, WPB Office
1150 45th St
West Palm Beach FL 33407

NOMINATED BY :

11 Xzavious Wiley Member AA M 561-985-0186 Representative of the 07/12/2022 07/11/2025
cartaviouswiley@yahoo.com Low-Income
754 Waddell Way
Pahokee FL 33476

NOMINATED BY :

12 Diane Lewis Member AI F -- Representative of the 03/14/2023 09/30/2025
dlewiss1208@gmail.com Low-Income
750 Malibu Bay Dr
West Palm Beach FL 33401

NOMINATED BY :

* indicates a member having an action pending

Appointed By : At-Large/Palm Beach County Board of County Commissioners

13 Cynthia M Ridley Member AA F 561-302-8064 Representative of the 10/19/2021 09/30/2024
cynridley58@gmail.com
210 NW 2nd Ave
Delray Beach FL 33444

NOMINATED BY :

14 Yves Saint-Hillien Member AA M -- Representative of the 08/23/2022 09/30/2024
yesainthillien@hotmail.com
8450 Linden Way
Lake Worth FL 33467

NOMINATED BY :

15 Michaella F Key Member AA F 561-352-1822 Representative of the 12/07/2021 09/30/2024
michaella.key@outlook.com
2522 Maniki Dr
West Palm Beach FL 33407

NOMINATED BY :

* indicates a member having an action pending