



**CHILDREN'S TRUST**  
OF ALACHUA COUNTY

## **CHILDREN'S TRUST REGULAR MEETING AGENDA**

August 08, 2022 at 4:00 PM

CTAC, 802 NW 5th Ave, Gainesville, FL 32601

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### **Call to Order**

### **Agenda Review, Revision and Approval**

Approval of the agenda also approves all of the items on the consent agenda.

### **Roll Call**

### **Consent Agenda**

1. [Board Attendance YTD](#)
2. [7.11.22 Regular Board Meeting Minutes](#)
3. [7.25.22 Regular Board Meeting Minutes](#)
4. [7.26.22 Special Board Meeting Minutes](#)
5. [Programmatic Award and Expense Report](#)
6. [July 2022 Checks and Expenditures Report](#)
7. [July 2022 Budget Review](#)
8. [Board Meeting Evaluation - Survey Results from 07-25-2022](#)

### **General Public Comments**

### **Chair's Report**

9. [Employment Agreement between CTAC and Marsha Kiner](#)

### **Executive Director's Report**

10. [8.8.22 ED Report](#)

### **Presentations**

11. [CTAC Program Updates](#)

### **Old Business**

12. [Listening Project ITN 2022-05 \(Committee Chair, Cheryl Twombly & Kristy Goldwire\)](#)
13. [Billboard Advertisements \(Dan Douglas\)](#)

## **New Business**

## **Board Member Comments**

## **For Your Information**

Items in this section are for informational purposes only and do not require any action by the Trust.

## **Next Meeting Date**

Regular Board Meeting

Monday, August 22, 2022 @ 4:00 PM

Children's Trust of Alachua County, 802 NW 5th Ave, Gainesville, FL 32601

## **Adjournment**

### **Virtual Meeting Information**

View or listen to the meeting: [https://www.youtube.com/channel/UCpYNq\\_GkjCo9FQo3qR5-SOw](https://www.youtube.com/channel/UCpYNq_GkjCo9FQo3qR5-SOw)

Public Comments: Submit online at <http://www.childrenstrustofalachuacounty.us/commentcard>

### **Guidelines for Public Comments**

Public comments can be made in person at the Children's Trust Board Meetings, or by completing a comment card at [www.childrenstrustofalachuacounty.us/commentcard](http://www.childrenstrustofalachuacounty.us/commentcard) We will no longer take comments by Zoom or by phone. Your written comments will be provided to Board Members prior to the start of each meeting.

Any member of the public wishing to be heard either under the agenda section "General Public Comments" or on a specific agenda items shall complete a comment card and present the card to the Clerk of the Trust prior to the start of the Board or Committee meeting. In the event following the start of a Board or Committee meeting additional items are added to the agenda, then with the consent of the Chair of the meeting, any member of the public may submit an appearance card to speak on such additional item(s) prior to Board or Committee discussion of such item(s).

Members of the public recognized by the Chair will have three (3) minutes to speak on a single "subject matter" submitted on an appearance card presented prior to the start of the meeting. In the event an individual submits multiple requests to be heard on more than one agenda item the Chair shall determine the amount of time allotted to the speaker, however, such time shall not exceed ten (10) minutes without approval of the Board or Committee.

The Clerk of the Trust will function as official timekeeper. Members of the public may not share or transfer all or part of their allotted time to any other person or to any other agenda item, except as permitted by this Policy. To the extent a speaker has previously addressed a Board or Committee on the same subject and at which a majority of the Board was present, then the Board Chair may limit repeat comments at the Board meeting by the same speaker.

**File Attachments for Item:**

1. Board Attendance YTD

## 2022 Board Member Attendance

Item 1.

Regular Meetings	1/10/2022	2/14/2022	3/14/2022	4/11/2022	4/25/2022	5/9/2022	5/23/2022	6/13/2022	6/27/2022	7/11/2022	7/25/2022	8/8/2022	8/15/2022	8/22/2022	9/12/2022	9/26/2022	10/10/2022	11/14/2022	12/12/2022
Labarta	P	P	P	P	P	P	P	P	P	P	P		cancelled						
Certain	P	P	P	P	P	P	absent	P	P	P	P		cancelled						
Pinkoson	P	P	P	V	P	P	P	P	P	P	P		cancelled						
Andrew	N/A	N/A	N/A	P	P	P	P	P	P	absent	P		cancelled						
Cole-Smith	P	P	V	V	P	V	P	P	P	P	P		cancelled						
Cornell	P	P	P	P	P	P	P	P	P	P	P		cancelled						
Ferrero	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	P	absent	P	P	cancelled						
Hardt	P	P	P	P	P	V	absent	V	V	absent	V		cancelled						
Miller-Jones	N/A	P	absent	absent	V	absent	absent	N/A	N/A	N/A	N/A		cancelled						
Simon	P	P	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A		cancelled						
Snyder	P	P	P	absent	P	P	P	P	P	P	V		cancelled						
Twombly	P	P	P	V	P	P	P	V	V	P	P		cancelled						

Special Meetings	Board Retreat 2/23/2022	Emergency Meeting 3/4/2022	ED Interviews 7/26/2022
Labarta	P	P	P
Certain	P	P	P
Pinkoson	P	P	V
Andrew	N/A	N/A	P
Cole-Smith	P	V	P
Cornell	P	P	P
Hardt	P	P	V
Miller-Jones	absent	V	N/A
Simon	P	N/A	N/A
Snyder	P	P	V
Twombly	P	V	P

V = Virtual Attendance  
P = Physical Attendance

**File Attachments for Item:**

2. 7.11.22 Regular Board Meeting Minutes



## CHILDREN'S TRUST REGULAR MEETING MINUTES

July 11, 2022 at 4:00 PM

CTAC, 802 NW 5th Ave, Gainesville, FL 32601

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### Call to Order

**Chair Dr. Margarita Labarta called the meeting to order at 4:00 PM.**

### Roll Call

#### PRESENT

Chair Maggie Labarta  
Vice Chair Tina Certain  
Treasurer Lee Pinkoson  
Member Karen Cole-Smith  
Member Ken Cornell  
Member Denise Ferrero  
Member Patricia Snyder  
Member Cheryl Twombly

#### ABSENT

Member Shane Andrew  
Member Nancy Hardt

### Agenda Review, Revision and Approval

Approval of the agenda also approves all of the items on the consent agenda.

**Motion to approve the Agenda made by Member Pinkoson, Seconded by Member Snyder.**

Motion was unanimously approved by voice vote.

### Consent Agenda

1. Board Attendance YTD
2. 5.26.22 Data Technical Advisory Minutes
3. 6.8.22 Special Meeting Minutes
4. 6.13.22 Regular Board Meeting Minutes
5. Board Meeting Evaluation - Survey Results from 6.27.22
6. June 2022 Checks and Expenditures Report

7. Programmatic Award and Expense Report
8. 3rd QUARTER FINANCIAL REPORT
9. CTAC Strategic Planning Activities and Timeline

## General Public Comments

### Chair's Report

10. Discussion of Format for 7/26 Special Meeting

Member Cornell suggested the two final candidates for Executive Director give a brief presentation, followed by board questions and public comments at the July 26<sup>th</sup> meeting. There was a general consensus and staff direction to coordinate.

### Executive Director's Report

11. Executive Director Report

AED Goldwire updated the board on the recent graduation of the first BLI Cohort and the positive media coverage associated with one of the Trust's providers, Gainesville Circus Center. She mentioned the upcoming phase of the Listening Project and highlighted the coding activities provided by New Tech Now.

### Presentations

12. Healthy Start of North Central Florida, Inc. Update on NewboRN Home Visiting Program (NHVP) and Maternal Family Partner at Comprehensive Women's Health (Mia Jones)

The board received presentations on the participation and impact of the funded programs.

13. Teens Work Alachua (Deon Carruthers)

Deon Carruthers gave an update on the successes and challenges of the TeensWork Alachua programs.

14. Afterschool Programming

Bonnie Wagner presented the Afterschool Summary Report for FY2022, which provided demographics, statistics, and other feedback from the six programs.

### Old Business

15. Contract for Accounting Services No. 12041 - Carr, Riggs & Ingram, LLC (Kristy Goldwire)

Frank Mason, CRI, proposed a 40% discount for ongoing services, which would be paid by unused money from their FY2021 contract, and new money from the FY2022 budget. The total funding would be capped at just over \$53,000, regardless of the hours worked by CRI staff to complete the necessary work.

**Motion by Member Cornell, Seconded by Member Pinkoson, to amend the contract according to staff recommendations.**

Motion approved by voice vote, with Vice Chair Certain in dissent.

### New Business

**Board Member Comments**

Member Cornell mentioned the 14M in fund balance and the critical needs in the community. He requested staff bring back recommendations on how to meet those needs. Member Cole-Smith agreed. Member Pinkoson suggested the Saving Smiles Program and the Child Advocacy Center. Member Twombly and Vice Chair Certain reminded the board that there have been recent cuts in United Way funding resulting in additional urgency to meet the needs of the community. Chair Labarta suggested that staff reach out to providers with capacity for mental health, dental health, and food insecurity.

**For Your Information**

Items in this section are for informational purposes only and do not require any action by the Trust.

**Next Meeting Dates**

Monday, July 25, 2022 @ 4:00 PM

Children's Trust of Alachua County  
802 NW 5th Ave, Gainesville, FL 32601

Monday, August 8, 2022 @ 4:00 PM

Children's Trust of Alachua County  
802 NW 5th Ave, Gainesville, FL 32601

**Adjournment**

**Chair Dr. Margarita Labarta adjourned the meeting 6:51 PM.**





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## Participation

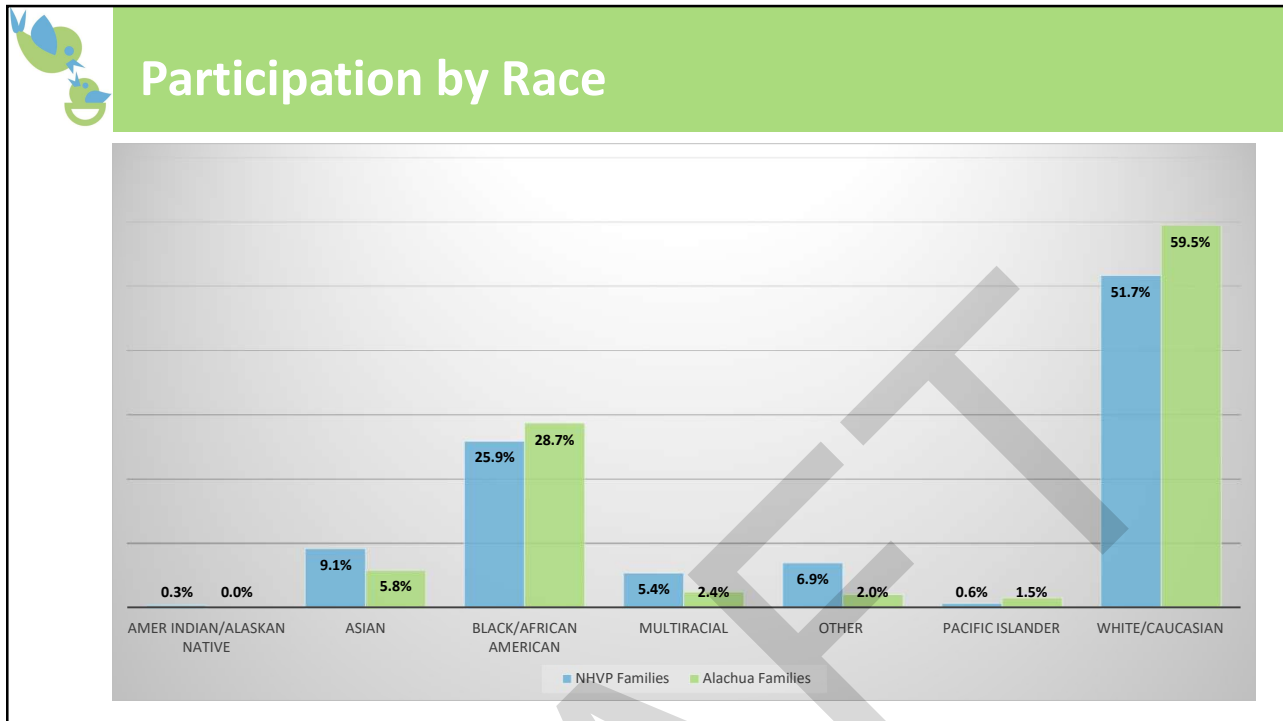
Year	Families Visited in Hospital		Consented to Program		Completed Home Visit/Assessment	
	#	%	#	%	#	%
2021-2022*	1,273	73.5%	781	61.4%	472	60.4%
2020-2021**	890	56.8%	492	55.3%	211	42.9%

\*October 2021 – May 2022  
 \*\*October 2020 – May 2021

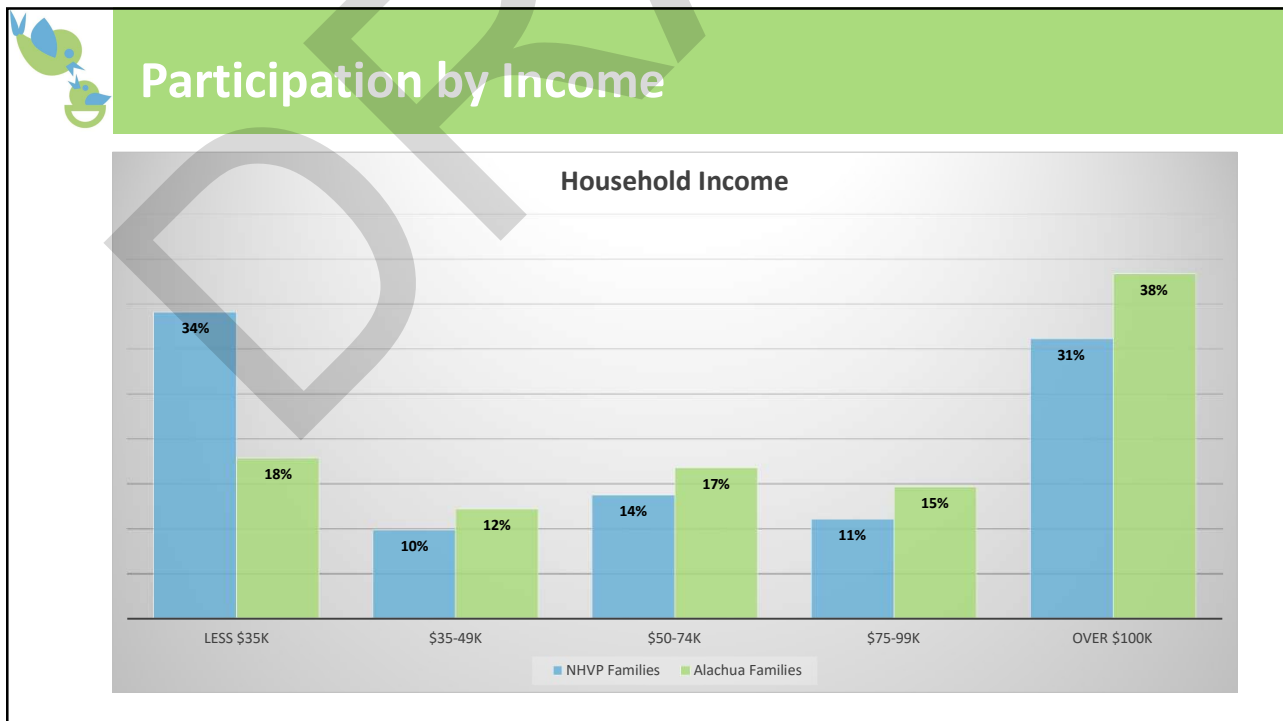
**Barriers**

1. Not wanting someone in their home
2. Already in a home visiting program
3. Not their first baby
4. Medical Professional

2



3



4

# Outreach and Awareness

## Advertisement

- Giggle Magazine
- Radio – Magic 101.3, Joy FM, WUFT
- Newspaper Ads
- Bus Ads
- Ads in health care provider offices (CWH)

- Home Visiting Programs
- Community Agencies and Events
- Social Media
- Prenatal Care Providers
- Pediatricians

**ADVERTISEMENT**

**NewboRN Home Visiting**

**What are moms saying about the NewboRN Home Visiting program?**

○ Nurse Sandee's visit far exceeded any expectations we had. She made my husband and I feel so empowered during such a vulnerable time as new parents. The education and resources she provided were perfect for our needs. This is an amazing service.

○ It was nice to have a medical professional come to the house rather than me having to physically go to an appointment.

○ Nurse Gina was great! She answered all my questions, and she was very knowledgeable. We covered a wide range of topics, and she was able to refer me a lot of resources.

○ Awesome info, even for a second time mom!

○ This program is amazing and I'm literally telling every new mom I know about it :)

*NewboRN Home Visiting is sponsored by Healthy Start of North Central Florida.*

**CHILDREN'S TRUST**

**NewboRN Home Visiting is available to Alachua County women who give birth at a hospital, birth center or home within the county. After your baby is born, a registered nurse (RN) will visit you at home for FREE to see how you are doing, share information and connect you to local resources. NewboRN Home Visiting Nurse Supervisor, Sandee Mayr RSN, RN, RNC-MHC, answered many of the most common questions she receives about this program.**

**Q: A free home visit from a registered nurse to check on me and my newborn? Sounds great. How do I sign up?**  
**A:** Go to our website [www.NewboRNHomeVisiting.org](http://www.NewboRNHomeVisiting.org) or call 352-227-9056.

**Q: The program. When should I contact NewboRN Home Visiting?**  
**A:** You can contact NewboRN Home Visiting as soon as you know you are pregnant. We will pre-register you and then plan a visit after you have your baby.

**Q: I feel prepared. Why should I participate?**  
**A:** Many changes and some challenges take place those first few days after the birth of your baby. That is why it is so helpful to have a NewboRN Home Visiting nurse come to your home to make sure you and your baby are doing well.

**Q: What happens at a visit?**  
**A:** At a visit, the nurse will do a physical and health assessment on baby and mom. She will offer help with breastfeeding and nutrition. She can also share tips about caring for your baby, ways to keep baby safe and discuss things like family planning, parenting, child development and more.

**Q: What does the Family Partner do?**  
**A:** The Family Partner will talk to you in the hospital when you have the baby and will help arrange a nursing visit. She will also follow-up with you after the visit with any additional things you may need.

**Q: Do the nurses have special training in infant and maternal care?**  
**A:** The NewboRN Home Visiting nurses have extensive experience and expertise working with newborns and their moms. They have specialized training in breastfeeding as well as newborn/maternal assessment.

**Q: I understand the program is free. What's the catch?**  
**A:** It is free to all Alachua County women. Children's Trust of Alachua County funds this program because it helps improve the health, safety and future of all babies born in the county. A worthy investment!

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# Father Involvement

## Father Folder

## Father participation during Visit

- This year = 38%
- Last year = 31%

## Infant CPR and Infant Safety Community Classes

- May 2022: 5 of the 15 attendees were dads

**newborn father**

**NewboRN Home Visiting**

The NewboRN Home Visiting program helps to improve the health, safety and future of all babies born in Alachua County.

**NewboRN Home Visiting**

**Healthy Start of North Central Florida**

**UFHealth**

**CHILDREN'S TRUST**

**NewboRN Home Visiting**

Visit [www.NewboRNHomeVisiting.org](http://www.NewboRNHomeVisiting.org)  
 Call 352-227-9056

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## Impact on Families

Medical Referrals = 64

- 51 for high blood pressure
- Others: mental health, rash, high temperature, incision care, infant illness, infant heart murmur

Supplies and Support Provided to Families

- Pack N Play
- Sleep Sacks
- Car Seats (CPS Tech - checks and installations)
- Breastfeeding Supplies (Certified Lactation Consultants)
- Thermometers
- First Aid Kits



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## Impact on Families

Satisfaction Survey Results (186 surveys received; 40% of participants)

- NewboRN nurse was helpful = 100%
- Information received was helpful = 100%
- Would recommend the program to a friend = 100%

Comments:

This program is incredible!!! The nurse, Sandee Muir is a wonderful woman. She came to my home and spent over 3 hours with me to do a physical assessment of my newborn and visit with me. She gave me so much useful and valuable knowledge regarding newborn care, breastfeeding assistance, post pregnancy care for the mother (me), and an endless list of resources and tools to connect me to the right outlets. I am in such awe of how caring and personable Sandee is and her genuine attention to patient care. Sandee truly cares about the mothers she visits. She came bearing gifts for my newborn and I, and my time with her was so helpful and I am thankful for her warmth and professionalism in visiting me and my newborn. As a first-time mother, I had a lot of questions and Sandee answered in great detail all of my questions. I will be spreading the word to the community just how amazing this program is! Thank you, Sandee!



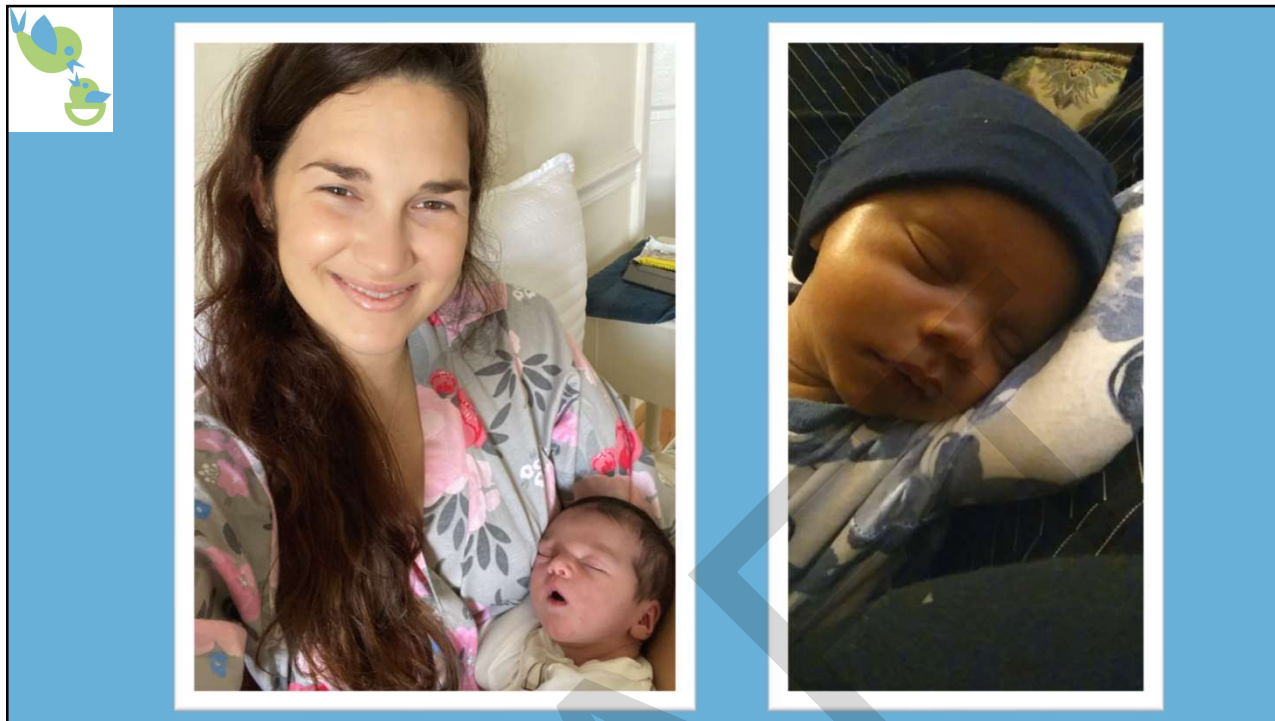
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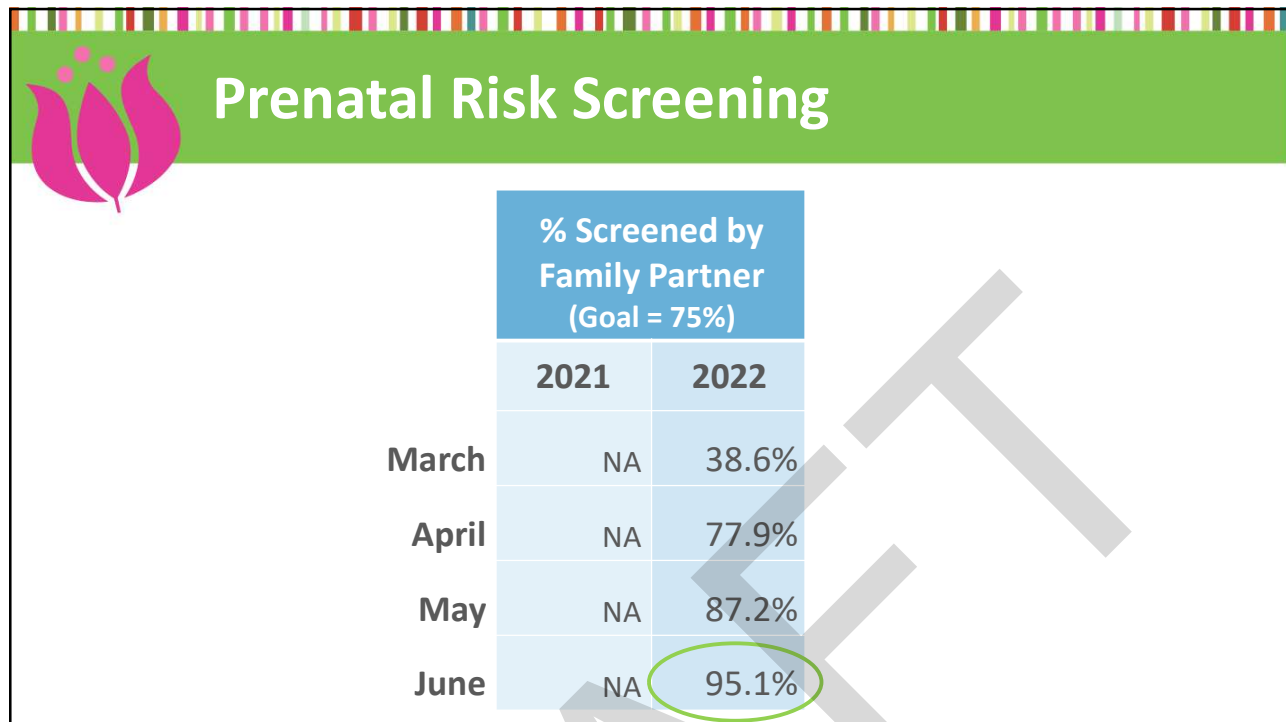
# Family Partner

## Comprehensive Women's Health

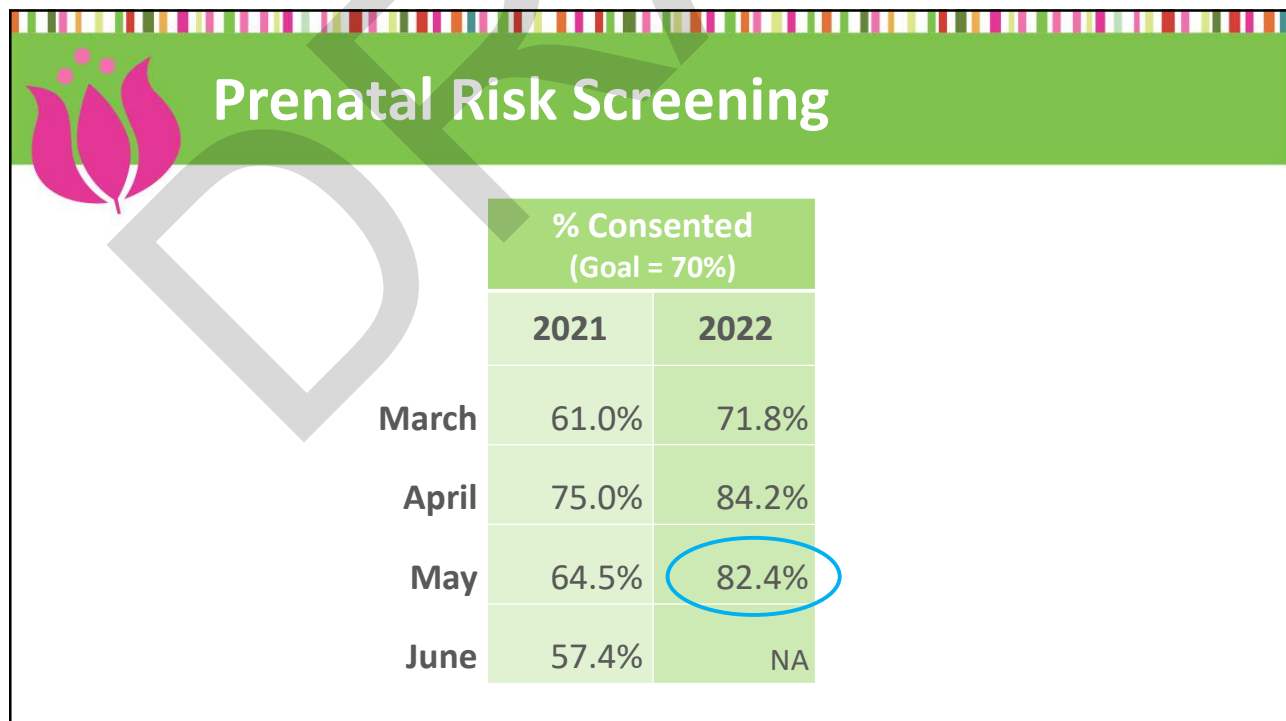
WellFlorida Council

Florida Healthy Start  
Healthy Start of North Central Florida Coalition

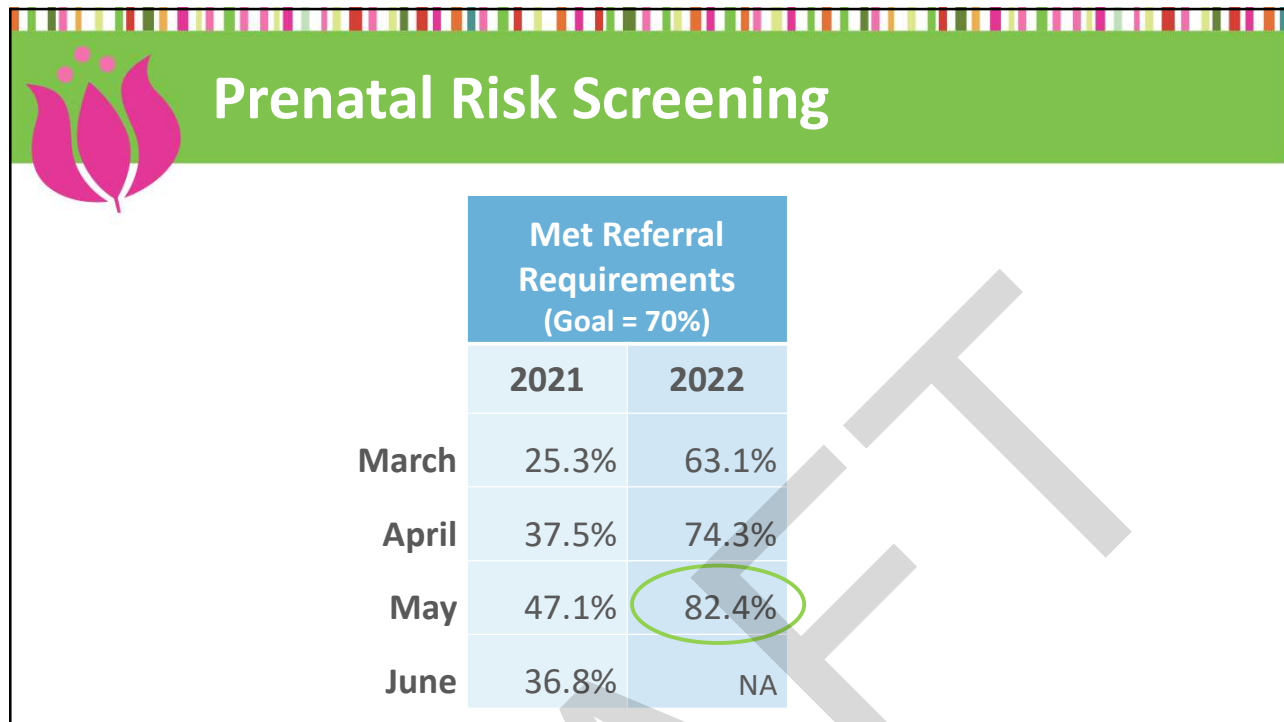
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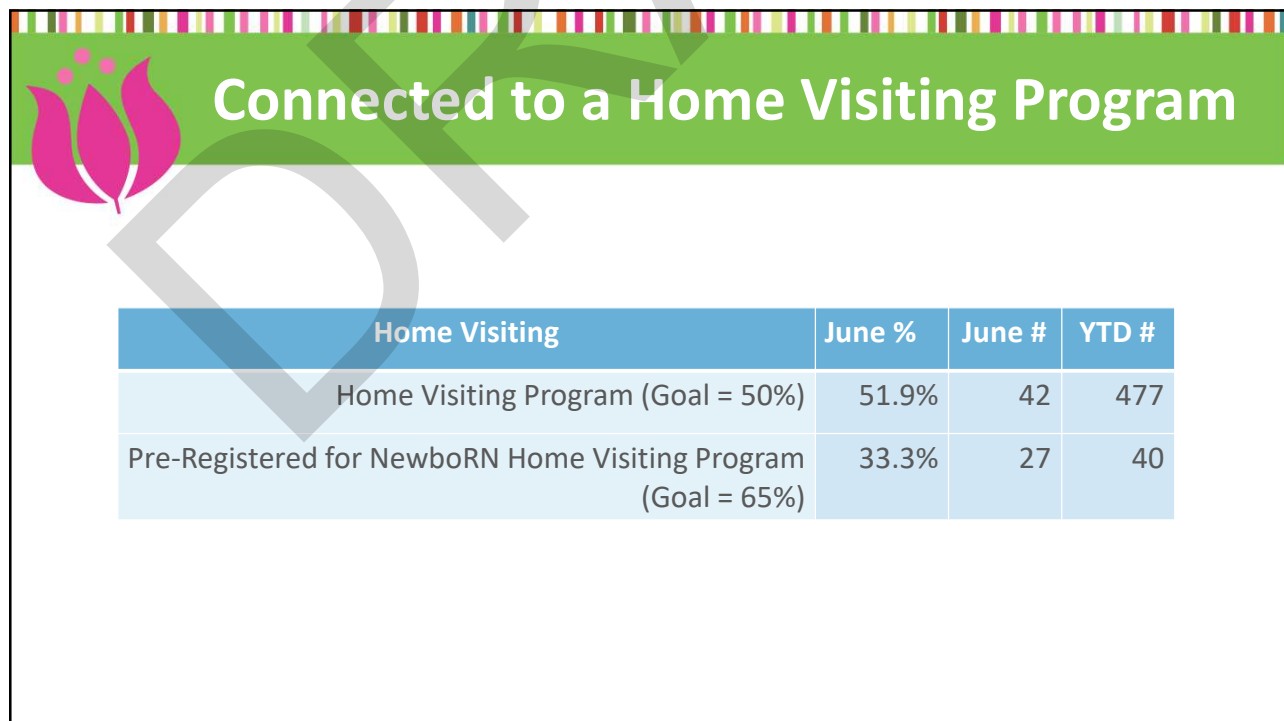
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14



15



16





# Child Passenger Safety Checks

Car seat installations and safety checks = 28



**FREE CAR SEAT INSTALLATIONS**



Did you know that 3 out of 4 car seats are not properly installed? At Comprehensive Women's Health, we care about you and the safety of your little one. Every Friday we will be offering FREE car seat installation assistance. Registration is required, mothers-to-be must be at least 35 weeks pregnant, and space is LIMITED as these are one-on-one appointments. Please allow 45 minutes for your appointment. To register, please call Alex at 352-332-7222 ext. 232.

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**Florida Healthy Start**  
Healthy Start of North Central Florida Coalition




**CHILDREN'S TRUST OF ALACHUA COUNTY**



18




19

DRAFT



1

### TeensWork Alachua Pilot Successes



- Goal: 150-200 Teen Summer Jobs
- As of July 1<sup>st</sup>: 207 Teens Working
- 43 Different Worksites

2

## Provider Challenges



### Challenges for contracted providers include:

- Worksite recruiting for ages 14-15
- Establishing a bank account for direct deposits
- 25 hour a week worksites (150 hours)
- Misinformation/confusion with parents and teens
- Timely payroll
- Identification documents
- Worksite Behavior issues
- Follow-through from teens



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## Payroll Approval Systems

### Goodwill Industries of North Florida:

- Goodwill HR Department
- ADP payroll system

### Minority Business Listing, Inc:

- Computer Aid, Inc. (CAI)
- Two sub-contract Staffing agencies
  - (Manpower (Teens 16-18))
  - (Remedy (Teens14-15))



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# Afterschool Summary Report – FY2022

Children’s Trust of Alachua County

Bonnie L. Wagner

Research, Planning, and Evaluation Coordinator

July 8, 2022

## Introduction

This report explores the initial year of the Children’s Trust of Alachua County’s funding afterschool programming for children in need in Alachua County.

In August 2021 through a competitive bid process, the Trust sought qualified afterschool program providers to host rising kindergarteners through 12th graders in safe and enriching afterschool programming for the 2021-2022 school calendar year. Ultimately, six organizations were funded to provide programming:

- Aces in Motion
- Boys and Girls Club
- Deeper Purpose
- Gainesville Circus Center
- Girls Place
- Kids Count

The purpose of this report is to gain knowledge on performance, successes, and areas for improvement afterschool programming. The primary audience for this report is the Trust staff, board, and providers who implement or help support the implementation of services who can gain insights and take actions to improve services and outcomes for children and families.

# Table of Contents

## Introduction

### Key Questions:

Why is afterschool important?

Who was served?

How much service was offered?

How much service did youth receive?

What factors are associated with attendance?

How much did service cost?

How did youth and parents experience services?

## Conclusion

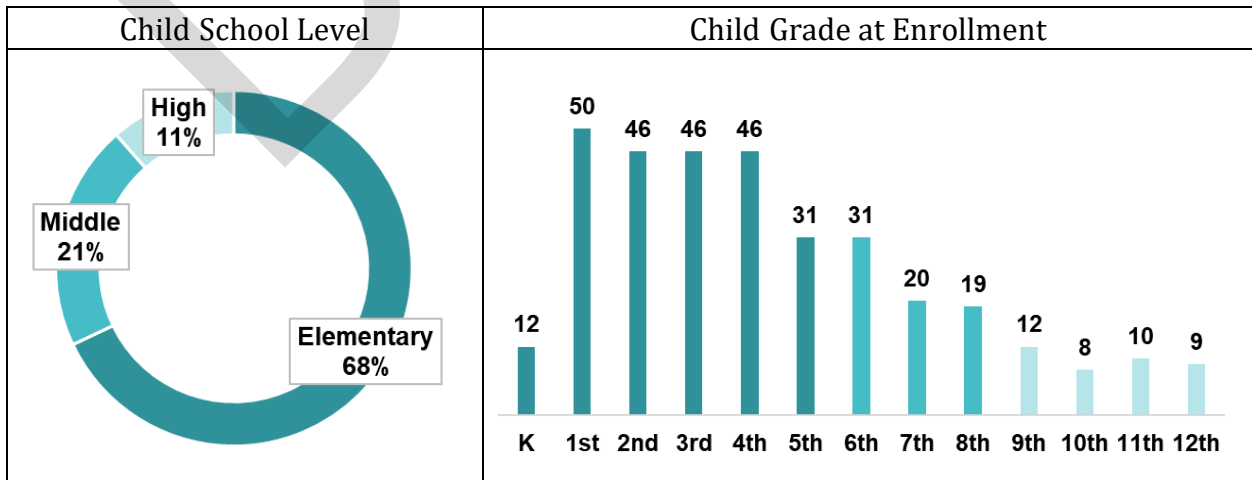
### Why is afterschool important?

Participating in high quality afterschool programming provides a structured, nurturing environment for youth to learn and develop. Out-of-school time opportunities allow for youth to take part in activities to promote their health, well-being, and support academic learning. Children’s Trust funds are exclusively directed for youth in need of extra support, specifically for children struggling financially, educationally, or due their family circumstances. Afterschool programs provides a safe environment for youth to develop bonds and relationships with peers and caring adults. Afterschool also provides access to expanded learning opportunities, which, inspires, enriches, and develops children’s career interests and making real-life connections to complement their academic learning during the school day.

### Who was served?

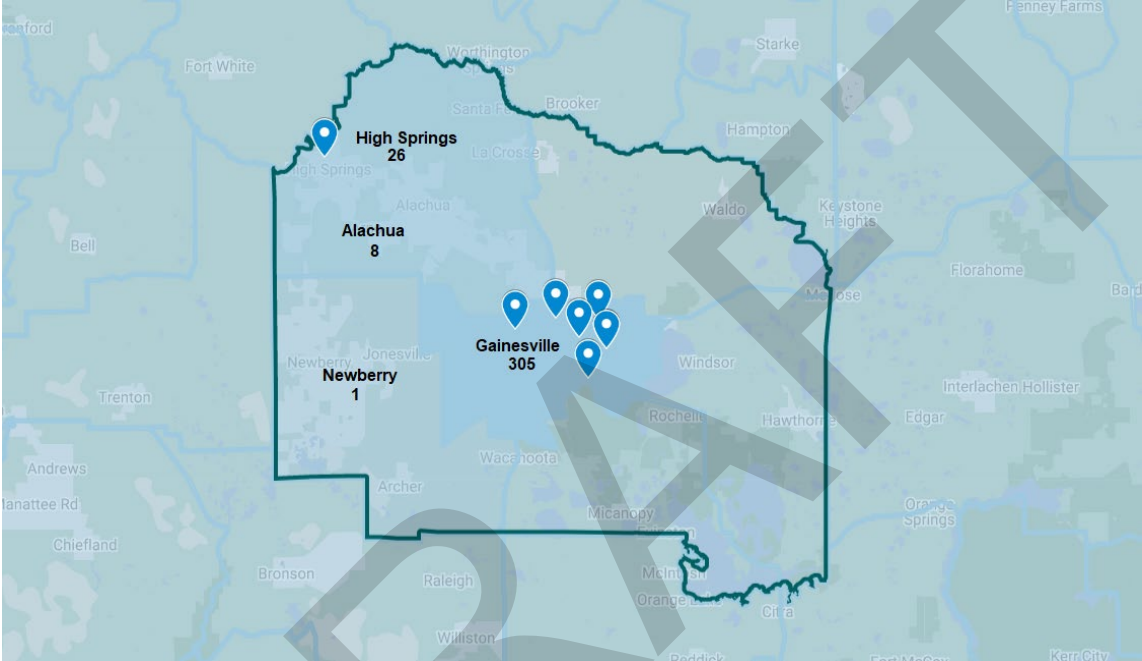
Overall, **340** youth were served through afterschool programs funded by the Trust. All providers exceeded the goal set for the number of youth enrolled.

The average age of youth served is 9.8 and ranged from five to nineteen years old. Over two thirds of youth were in elementary school, twenty-one percent in middle and eleven percent in high school. Metcalfe (35), Rawlings (35), High Springs Community (28), Norton (24), and Westwood (20) were the five schools where the greatest frequency of afterschool youth attended.

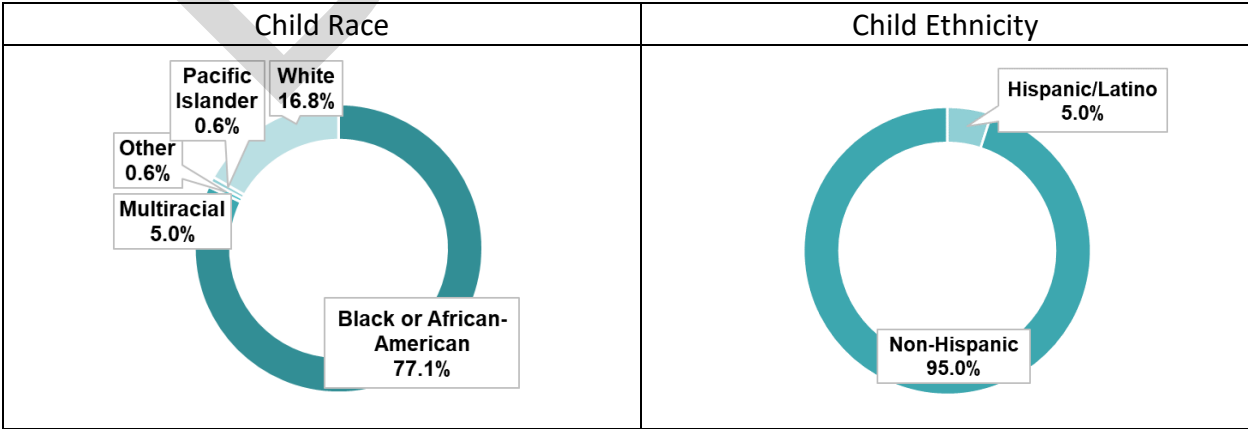


All youth are Alachua County residents. Ninety percent of youth reside in Gainesville, followed by some representation from High Springs (8%), Alachua (2%), and Newberry (<1%).

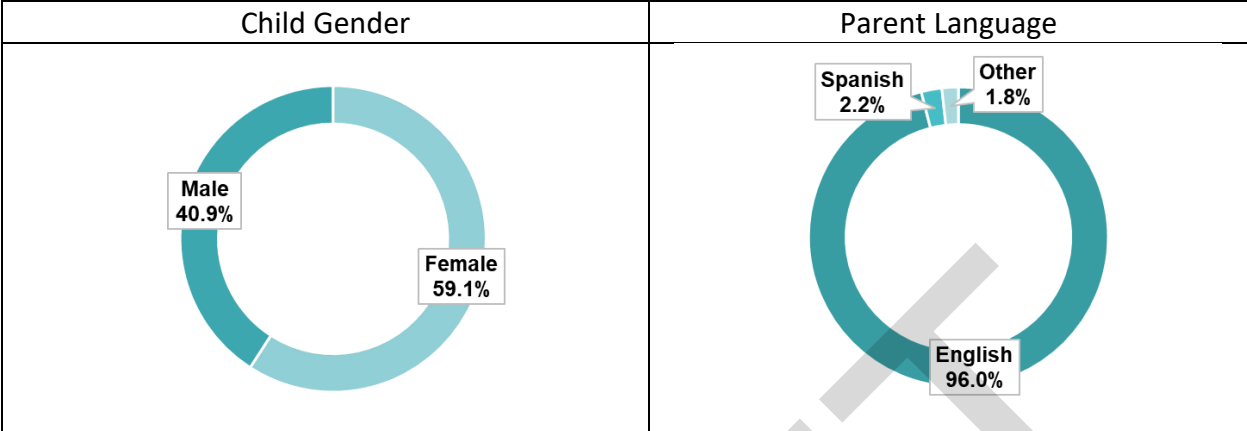
**Figure 1.**  
*Provider Locations and Youth Served by City of Residence.*



Seventy-seven percent of youth are Black or African American, 17% are White, five percent Multiracial, and under two percent indicated other races. A large majority of youth identified as non-Hispanic (95%).







Nearly all parents were reported as being English speaking with just a few parents speaking Spanish or other languages. More female youth are served than males with most sites having a greater prevalence of females than males, and one site – Girls Place – serving females exclusively.

To be eligible for a Trust scholarship families provide documentation to demonstrate need. Allowable documentation verifying scholarship eligibility included: income verification (pay statement, W2, tax return, etc.), receipt of public assistance (SNAP), receipt of special education services (IEP, 504 plan), or children in foster care, voluntary and formal kinship care (placement letter). Children might have multiple situations apply to them though parents are to provide one documentation for scholarship eligibility. Most youth qualified for a scholarship based a family income at or below 200% of the federal poverty level (65%), following by being a recipient of SNAP benefits (18%), having a family income between 200%-400% of the federal poverty level (13%), special learning needs (3%), and out-of-home placement (<1%).

### How much service was offered?

Providers offered an average of **150 days of service** ranging from 132 to 166 days. In total, this represents 1,192 days of programming provided to youth. In some instances, the actual days of programming is lower than the contracted number of days. Reasons for this include closures due to COVID, other illnesses, lack of staffing, and miscalculation in the number of program days.

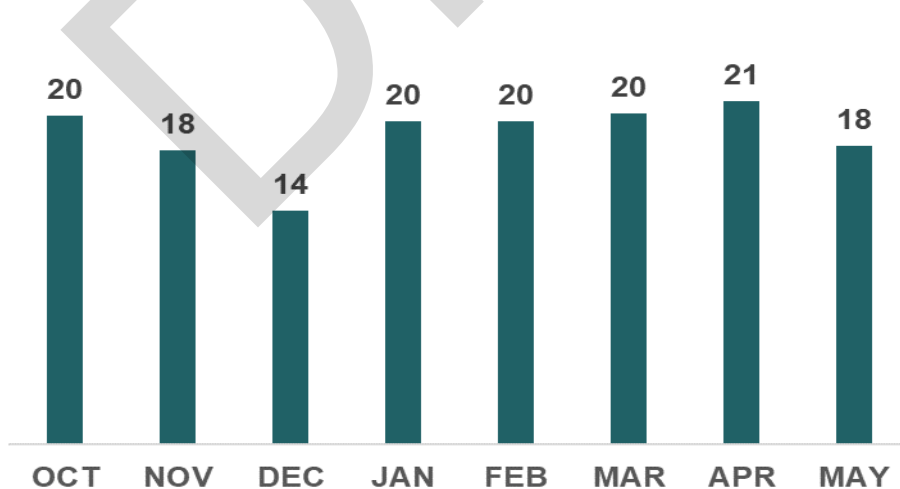
**Table 1.**

*Days of Services by Provider Agency and Site.*

<b>Provider Agency</b>	<b>Site</b>	<b>Actual Program Days</b>	<b>Contracted Program Days</b>
Aces in Motion	Duval ELC	141	141
Boys and Girls Club	Northwest	155	155
	Woodland Park	155	155
Deeper Purpose	Kids Academy	147	164
Gainesville Circus	Gainesville Circus	166	160
Girls Place	Girls Place	162	163
Kids Count	Duval ELC	132	139
	Faith Mission	138	139
<b>All Afterschool Programs</b>		<b>1,196</b>	<b>1,216</b>

**Figure 2.**

*Average Days of Service Offered per Month.*



### How much service did youth receive?

On average **youth attended 91 days** of programming, which ranged from 72 to 111 days across sites. Relative to the days of service offered by the site, on average, youth attended **62%** of the program days offered.

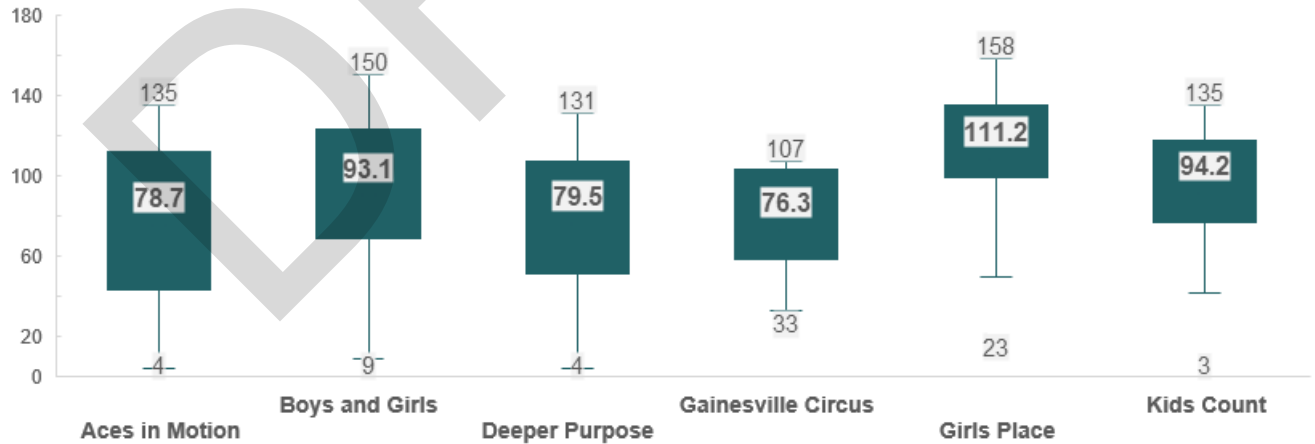
**Table 2.**

*Youth Attendance by Provider Agency and Site.*

Provider Agency	Site	Program Days Attended	Average Attendance	Program Days Offered
Aces in Motion	Duval ELC	56%	79 days	141
Boys and Girls Club	Northwest	64%	99 days	155
	Woodland Park	47%	72 days	155
Deeper Purpose	Kids Academy	54%	80 days	147
Gainesville Circus	Gainesville Circus	46%	76 days	166
Girls Place	Girls Place	69%	111 days	162
Kids Count	Duval ELC	66%	87 days	132
	Faith Mission	75%	103 days	138
<b>All Afterschool Programs</b>		<b>62%</b>	<b>91 days</b>	<b>150</b>

**Figure 3.**

*Youth Attendance Distribution by Provider Agency.*



While the majority of youth were signed up in October and stayed for the duration of the school year (62%), there were some children who exited the program early or joined later in the year (38%). Across providers, 81% of youth attended at least 50 days.

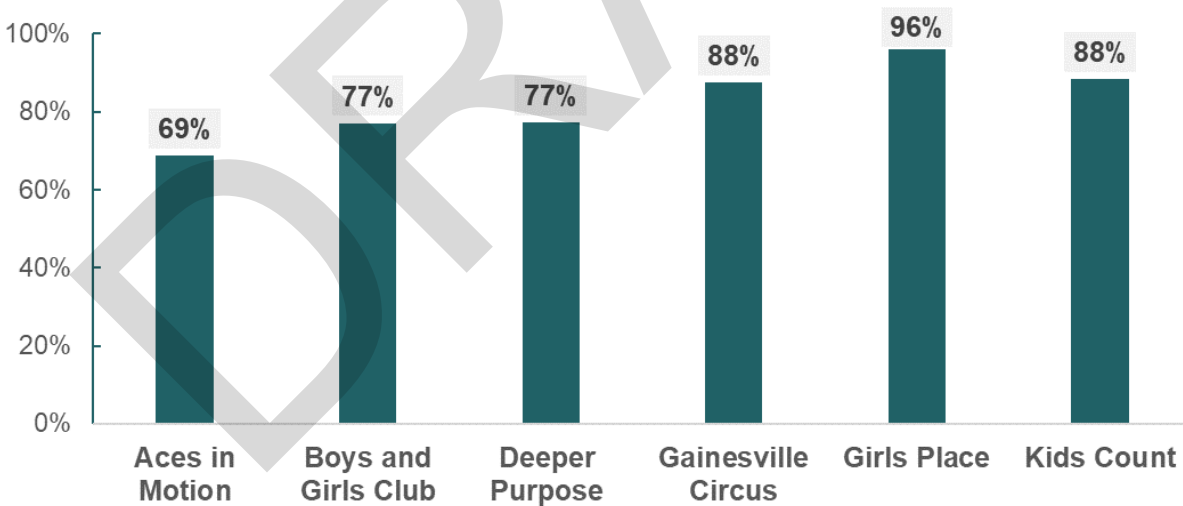
**Table 3.**

*Youth Duration in Services*

<b>Provider Agency</b>	<b>Enrolled for 8 months</b>	<b>Average Months</b>
Aces in Motion	70%	6.8
Boys and Girls Club	56%	6.7
Deeper Purpose	43%	6.1
Gainesville Circus	31%	5.9
Girls Place	78%	7.2
Kids Count	67%	6.8
<b>All Afterschool Programs</b>	<b>62%</b>	<b>6.7</b>

**Figure 4.**

*Percent of Youth Attending at least 50 days by Provider Agency.*



## What factors are associated with attendance?

Attendance in a multitude of settings has been greatly impacted by COVID, especially in school, afterschool, and childcare programs. An article in Education Week highlights how COVID exacerbated chronic absence causing disrupted learning and argues that family engagement and building relationships with adults and other students are effective strategies for tackling chronic absenteeism<sup>1</sup>. Absence from learning opportunities, including school, afterschool, and childcare, has likely had significant influence in the decreases seen in 2021 for kindergarten readiness, 3<sup>rd</sup> and 8<sup>th</sup> grade reading proficiency, as well as high school graduation rates in Alachua County. According to [AttendanceWorks](#), research shows the undeniable benefits of regular school attendance, and the high costs related to absenteeism, including lessened student achievement and increased dropout rates. If family engagement, strong bonds with adults and fellow students, good attendance habits are reinforced in afterschool they will likely also translate to improved school attendance.

**Figure 5.**

*Children’s Trust of Alachua County, Goal 2 – Children Learn What They Need to Be Successful and associated Community Level Indicators.*

ALL CHILDREN LEARN WHAT THEY NEED TO BE SUCCESSFUL			
	Alachua County Previous Value (Yr.)	Alachua County Most Recent Value (Yr.)	Change Between Years
Children are Ready for Kindergarten <i>Florida Kindergarten Readiness Screener (FLKRS)</i>	<b>58.4%</b> (2020) 44.2% of black students	<b>54.8%</b> (2021) 35.4% of black students	▼
3rd Grade Reading Proficiency <i>Florida Standards Assessment (FSA) English Language Arts</i>	<b>56.6%</b> (2019) 31.8% of black students	<b>52.5%</b> (2021) 29.4% of black students	▼
8th Grade Reading Proficiency <i>Florida Standards Assessment (FSA) English Language Arts</i>	<b>60.7%</b> (2019) 31.2% of black students	<b>57.8%</b> (2021) 31.9% of black students	▼
High School Graduation Rates	<b>90.4%</b> (2020) 84.1% for black youth	<b>86.6%</b> (2021) 82.5% for black youth	▼

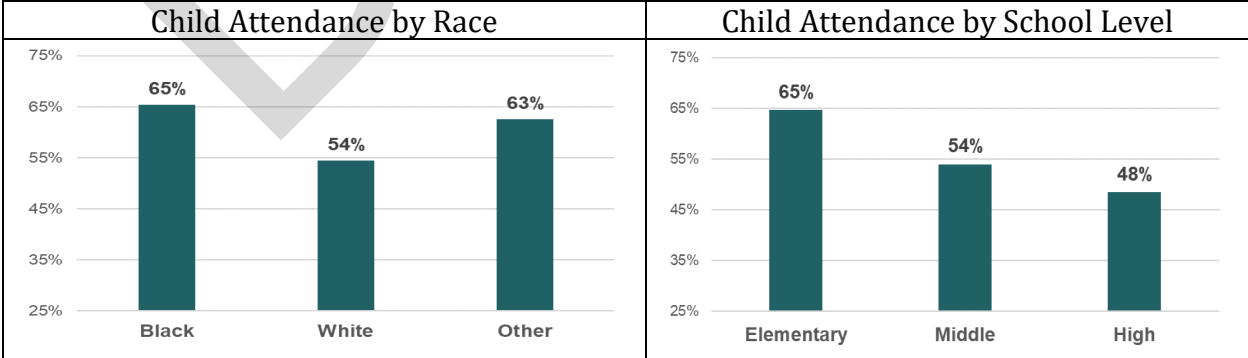
<sup>1</sup> Blad, E. (2022). Chronic Absenteeism Spiked During COVID. Here’s What Schools Can Do About it. Education Week. <https://www.edweek.org/leadership/chronic-absenteeism-spiked-during-covid-heres-what-schools-can-do-about-it/2022/04>

Providers were asked during site visits more about the causes of absence and below summarizes the reasons described. Provider were also asked to complete an “End of Program Reflection Survey” where they could rate each reason as a “major”, “moderate”, “minor”, or “not a factor”. Illness, sickness, or injury was frequently endorsed as a major factor in attendance. Parent custody, medical appointments, and other activities was also noted as a major factor by a third of provider agencies. Transportation, moving out of the area, and other activities were noted as moderate factors by half of providers.

**Causes of Absence:**

- Illness, sickness, or injury
- Moving out of the area
- Homelessness or housing insecurity
- Other activities (such as sports, clubs, etc.)
- Academic tutoring
- Parent custody
- Social dynamics between youth (i.e., bullying, not getting along)
- Medical appointments
- Transportation

Demographics characteristics statistically associated with attendance include race and school level<sup>2</sup>. Specifically, children identified as White demonstrated the lowest rates of attendance (54%), followed by those whose race was identified as Other (63%), and Black (65%). School level was also statistically associated with attendance with children in elementary school attending at higher rates than middle and high school students.



<sup>2</sup> Note: Aces in Motion program data could not be included in this analysis because they did not submit data in the same requested format as other providers.

## How much did services cost?

The Children’s Trust allocated **\$761,989** for children to be served in quality afterschool programs. While the actual amount spent is still pending final provider invoicing, Table 4 presents the funding allocation for each provider agency, the number of children served, and the cost per child. The average cost per child is \$2,241, which ranges greatly from \$1,485 to \$5,971.

**Table 4.**

*Cost per Child Estimate based on Funding Allocation.*

<b>Provider Agency</b>	<b>Funding Allocation</b>	<b>Children Served</b>	<b>Cost per Child</b>
Aces in Motion	\$188,443	64	\$2,944.42
Boys and Girls Club	\$142,569	96	\$1,485.09
Deeper Purpose	\$72,175	35	\$2,062.14
Gainesville Circus	\$95,539	16	\$5,971.19
Girls Place	\$120,238	51	\$2,357.61
Kids Count	\$143,025	78	\$1,833.65
<b>All Afterschool Programs</b>	<b>\$761,989</b>	<b>340</b>	<b>\$2,241.14</b>

Due to recent labor market shortages, it is imperative to offer competitive wages and benefits to attract and retain high quality staff. Providers indicated a key success factor was their staff – their commitment and dedication – and providing training so that they can provide the best possible services to children in their care. The average weighted daily market rate for school age children in Alachua County per the Florida Office of Early Learning is \$26.82, which would equate to \$2,441 if youth attended 91 days<sup>3</sup>. There are many factors that go into calculating the cost of care, and the [Wallace Foundation](#) offers another cost calculator<sup>4</sup>.

<sup>3</sup>See link: <https://www.floridaearlylearning.com/providers/market-rate>

<sup>4</sup>Wallace Foundation’s Out-of-school time Cost Calculator: <https://www.wallacefoundation.org/cost-of-quality/pages/default.aspx>

## How did youth and parents experience services?

At the end of the program or upon exit families are asked to complete a satisfaction survey to provide their perspective and feedback on the program. The survey was available in English and Spanish and could be completed on paper or online. There were 185 surveys completed with a completion rate of 54%. It was noted that parents with multiple children enrolled tended to submit one survey per family.

**Table 5.**

*Survey Completion Rates.*

<b>Provider Agency</b>	<b>Completion Rate</b>	<b>Completed Surveys</b>	<b>Children Served</b>
Aces in Motion	62.5%	40	64
Boys and Girls Club	41.7%	40	96
Deeper Purpose	57.1%	20	35
Gainesville Circus	100.0%	16	16
Girls Place	68.6%	35	51
Kids Count	43.6%	34	78
<b>All Afterschool Programs</b>	<b>54.4%</b>	<b>185</b>	<b>340</b>

Overall, **93%** of those surveyed reported their experience was either “**good**” or “**great**” and **all** indicated they **would recommend** the program. Across all items, displayed in Figure 6, youth and parents expressed consistently high levels of satisfaction. Parents and youth were also asked what they liked best about the program. Key themes regarding what children **liked best** included:

- **Activities**

*“The surprise cookouts”*

*“Splash days”*

*“The book giveaways”*

*“Doing fun circus arts.”*

*“Science experiments.”*

*“Playing sports with the other kids, field trips.”*



- **Staff**

*“The loving teachers.”*

*“Positive adult role models.”*

*“How loving, caring and eager [staff] were on a daily with not only my kid but with others kids that a I saw on a daily.”*

*“All four of my girls and myself agree that the staff and administration is the best experience of it was not for staff that create the loving, warm and welcoming environment for all the girls. The staff are dedicated and passionate about each child not just academically, but their well-being. They are so uplifting and encouraging.”*

- **Making Friends**

*“Getting to know new friends.”*

*“Making so many friends”*

*“Seeing their friends every day.”*

*“Making friends.”*

- **Help with Schoolwork**

*“Being able to have homework help readily available.”*

*“Getting help w/ homework & meeting new friends.”*

*“Tutoring and staff”*

*“The environment, activities, and help with homework. “*

*“Work with the other teammates and learning the right way to study.”*

In addition to the themes noted building relationships and feeling cared about were significant and impactful for children. Some or many children may have been eager for connection coming out of the isolation and separation that COVID created. In the words of one family, what they liked best was:

*“Being able to be themselves. Becoming close with people they didn’t know initially.”*

On the other end of the spectrum, what parents and youth **liked least** included:

- **Homework** – While youth and parents expressed appreciation for the help with schoolwork, youth also expressed that homework was their least favorite

program component. At the same time, there were also comments provided about wanting more help and homework time.

*"Mandatory academics."*

*"Doing homework"*

*"Almost no help on homework."*

*"Wanted more homework time"*

- **Peer Problems** – Making friends, being able to socialize and bond with peers was what many youth liked best, but when youth didn't get along it was also noted as what they disliked most about the program.

*"Some kids were not nice."*

*"Mean students."*

*"When some of the children in her group would not listen and follow what they were being instructed to do because it caused everyone to get in trouble."*

*"She sometimes complained about bullying"*
- **Staff** – Many described connection and relationship with staff as what they liked best about the program, and it was also reflected in their dislikes in instances when staff leave or when youth felt unable to connect.

*"When a counselor would leave for a new job, college, etc."*

*"She not being able to connect and communicate with some of the coaches was a struggle for her."*
- **Too Hot** – Several youth noted their greatest dislike was the heat of the gym and being outside in the heat. Again though, sports and being outside was also noted frequently as what many youth enjoyed most.

*"How hot it is in the gym."*

*"Being outside a lot in the heat."*
- **Food** – Some youth noted the snacks and the food being their favorite part, yet there were also some youth who expressed they disliked the snacks and meals provided, or that there wasn't enough.

*"Not enough snacks"*

*"Food was always cold"*

**Figure 6.**  
*Satisfaction Results by Item.*



## Conclusion

The initial year of the Children's Trust funding afterschool program included many successes. Specifically, **340** youth in need received services with very high rates of satisfaction among those surveyed. Youth and parents expressed appreciation for the staff, help with homework, being able to socialize and develop bonds with peers, and enjoyment of the activities and enrichment programming offered.

While high rates of youth received at least 50 days of service, better attendance is desired. Regular and on-going attendance may never be achievable for all children, however, is a necessary element to achieve the positive impacts desired by both the Children's Trust and providers. The Trust will continue to measure attendance and support providers in addressing barriers to fully engaging children as needed.

The Trust aspires to see all children reach their potential academically and ensuring children with special needs receive supports needed as well as children have their basic needs met. Further exploration of how this is currently happening, possibilities for further enhancements is underway. Another area of consideration might be to explore how to provide services to youth in eastern Alachua County.

**File Attachments for Item:**

3. 7.25.22 Regular Board Meeting Minutes



## CHILDREN'S TRUST REGULAR MEETING MINUTES

July 25, 2022 at 4:00 PM

CTAC, 802 NW 5th Ave, Gainesville, FL 32601

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### Call to Order

**Chair Dr. Margarita Labarta called the meeting to order at 4:00 PM.**

### Roll Call

#### PRESENT

Chair Maggie Labarta  
Vice Chair Tina Certain  
Treasurer Lee Pinkoson  
Member Shane Andrew  
Member Karen Cole-Smith  
Member Ken Cornell  
Member Denise Ferrero  
Member Nancy Hardt – attended virtually  
Member Patricia Snyder – attended virtually  
Member Cheryl Twombly

### Agenda Review, Revision and Approval

Approval of the agenda also approves all of the items on the consent agenda.

**Motion to approve the Agenda made by Member Pinkoson, Seconded by Member Cornell.**

Motion was unanimously approved by voice vote.

### Consent Agenda

1. Board Attendance YTD
2. 6.27.22 Regular Board Meeting Minutes
3. Board Meeting Evaluation - Survey Results from 7.11.22
4. 3rd Quarter Budget Review
5. Programmatic Award and Expense Report

### General Public Comments

### Chair's Report

## Committee Updates

### 6. Listening Project ITN 2022-05 (Kristy Goldwire & Committee Chair, Cheryl Twombly)

Member Twombly reported that four proposals to the ITN have been received and the review team is currently in the process of scoring. The public review of applications will take place on Thursday, July 28 at 1:00 PM, after which the committee shall make a recommendation on which proposal to move forward. This will be released August 1, and presented to the Board for approval at the August 8 Regular Board Meeting. Contract negotiations will begin August 9, with the contract starting around August 15.

### Presentations

#### 7. Afterschool Programming (Bonnie Wagner)

Corey Cheval from Gainesville Circus Center presented on the activities and successes the Children's Trust funding has made possible for their current afterschool programming.

## Board Member Comments

### For Your Information

Items in this section are for informational purposes only and do not require action by the Trust.

#### 8. Executive Director Search - Meet & Greet

### Next Meeting Dates

Special Board Meeting – Executive Director Candidates Presentations

Tuesday, July 26, 2022 @ 4:00 PM

Children's Trust of Alachua County, 802 NW 5th Ave, Gainesville, FL 32601

Regular Board Meeting

Monday, August 8, 2022 @ 4:00 PM

Children's Trust of Alachua County, 802 NW 5th Ave, Gainesville, FL 32601

### Adjournment

**Chair Dr. Margarita Labarta adjourned the meeting at 4:18 PM.**

## Meet and Greet

There will be a meet and greet with the final two Executive Director candidates directly after this meeting at 6:00pm. The public is encouraged to attend. There will be a second opportunity tomorrow, July 26, 2022 from 2:30-4:00pm. At that time, the candidates will give a brief presentation, followed by Q&A from the Board.

**File Attachments for Item:**

4. 7.26.22 Special Board Meeting Minutes





## CHILDREN'S TRUST - SPECIAL MEETING MINUTES

July 26, 2022 at 4:00 PM

CTAC, 802 NW 5th Ave, Gainesville, FL 32601

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### Call to Order

**Chair Dr. Margarita Labarta called the meeting to order at 4:00 PM.**

### Roll Call

#### PRESENT

Chair Maggie Labarta

Vice Chair Tina Certain

Treasurer Lee Pinkoson – attended virtually

Member Shane Andrew

Member Karen Cole-Smith

Member Ken Cornell

Member Denise Ferrero

Member Nancy Hardt – attended virtually

Member Patricia Snyder – attended virtually

Member Cheryl Twombly

**Motion made by Member Cornell, Seconded by Vice Chair Certain to allow Member Pinkoson an extraordinary circumstance and the ability to vote on any items during this meeting.**

Motion was unanimously approved by voice vote.

### Candidate Presentations

Both candidates for Executive Director, Kimberly Lancaster and Marsha Kiner, gave presentations on their visions for the Trust.

### Board Member Q & A

### Public Comment

**Motion made by Member Cornell, Seconded by Member Twombly, to select Ms. Kiner as the Executive Director for the Children's Trust, and empower Chair Labarta and Attorney Swain to negotiate a draft employment agreement and bring back to the board for approval as soon as possible.**

Motion was unanimously approved by voice vote.

**Adjournment**

**Chair Dr. Margarita Labarta adjourned the meeting to order at 6:40 PM.**

DRAFT

**File Attachments for Item:**

5. Programmatic Award and Expense Report



**Item:**

Programmatic Award and Expense Report

**Requested Action:**

The Trust is asked to receive the report.

**Background**

Upon request of Board Members, Provide monthly report of Programmatic funding by Goal. The report should include initial awarded amount and YTD expenses. The report may be under the consent agenda subject to being removed for further discussion.”

**Attachments**

Program Funding and Expense Report

**Programmatic Impact:**

NA

**Fiscal Impact:**

NA

**Recommendation:**

Receive the Report

**GOAL 1: ALL CHILDREN ARE BORN HEALTHY AND REMAIN HEALTHY** \$ 687,706 \$ 687,706 \$ 320,705 \$

**STRATEGY 1.1 SUPPORT MATERNAL AND CHILD HEALTH**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
MATERNAL FAMILY PARTNER	Healthy Start of North Central Florida, Inc.	\$ 75,000	\$ 75,000	\$ 29,097	\$ 45,903
NEWBORN HOME VISITING PROGRAM	Healthy Start of North Central Florida, Inc.	\$ 400,000	\$ 400,000	\$ 224,656	\$ 175,344

**STRATEGY 1.2 SUPPORT MENTAL HEALTH AND SUBSTANCE ABUSE PREVENTION**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
REACH COMMUNITY COUNSELING SERVICES FOR ADOLESCENT GIRLS	PACE Center for Girls Inc.	\$ 75,000	\$ 75,000	\$ 17,814	\$ 57,186
YOUTH MENTAL HEALTH SUPPORT DURING AFTER-SCHOOL AND SUMMER PROGRAMMING	Partners in Adolescent Lifestyle Support (PALS) THRIVE (A University of Florida Health Program) Shands Teaching Hospital	\$ 75,000	\$ 75,000	\$ 25,507	\$ 49,493

**STRATEGY 1.3 SUPPORT PHYSICAL HEALTH**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
WELLNESS COORINATOR @ HOWARD BISHOP MS *	Children's Home Society of Florida	\$ 62,706	\$ 62,706	\$ 23,630	\$ 39,076

**STRATEGY 1.4 IMPROVE FOOD SECURITY**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
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**GOAL 2: ALL CHILDREN CAN LEARN WHAT THEY NEED TO BE SUCCESSFUL** \$ 4,950,567 \$ 4,502,076 \$ 1,342,184 \$ 2,839,892

**STRATEGY 2.1 SUPPORT PROFESSIONAL DEVELOPMENT AND CAPACITY-BUILDING**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
TRANSFORMATIVE PROFESSIONAL DEVELOPMENT	Early Learning Coalition of Alachua County	\$ 248,026	\$ 248,026	\$ 135,372	\$ 112,654
V'LOCITY MASTER CLASS SERIES	Business Leadership Institute for Early Learning	\$ 90,000	\$ 95,500	\$ 30,000	\$ 65,500
ACCREDITATION ACADEMY	Multiple	\$ 300,000	TBD	\$ -	\$ -
PROFESSIONAL DEVELOPMENT REGISTRY	The Children's Forum	\$ 34,650	\$ 34,650	\$ 26,988	\$ 7,663
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Alachua County Board of County Commissioners	\$ 8,125	\$ 9,251	\$ -	\$ 9,251
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Boys and Girls Club of NE Florida	\$ 30,000	\$ 30,000	\$ 20,000	\$ 10,000
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Traveling Arts Camp	\$ 23,626	\$ 22,736	\$ 17,369	\$ 5,367
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Gainesville Circus Center	\$ 16,974	\$ 16,974	\$ 14,942	\$ 2,032
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Gainesville Area Tennis Association (Aces in Motion)	\$ 37,850	\$ 37,850	\$ 19,100	\$ 18,750
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Kids Count in Alachua County, Inc.	\$ 30,586	\$ 30,350	\$ 9,921	\$ 20,429
ITN 2022 - 01 YOUTH DEVELOPMENT CAPACITY BUILDING	Girls Place, Inc.	\$ 31,800	\$ 31,000	\$ -	\$ 31,000
ITN 2022 - 03 YOUTH DEVELOPMENT CAPACITY BUILDING FOR ENRICHMENT PROVIDERS	TBD	\$ 97,119		TBD	
ITN 2022 - 03 YOUTH DEVELOPMENT CAPACITY BUILDING FOR ENRICHMENT PROVIDERS	Motiv8U	\$ 8,723	\$ 8,723	\$ 2,500	\$ 6,223
ITN 2022 - 03 YOUTH DEVELOPMENT CAPACITY BUILDING FOR ENRICHMENT PROVIDERS	New Technology Made Simple Now Inc	\$ 14,158	\$ 14,158	\$ 2,850	\$ 11,308
PHILANTHROPY HUB	Community Foundation of North Central Florida	\$ 8,500	\$ 8,500	\$ 8,500	\$ -

**STRATEGY 2.2 EXPAND ACCESS TO HIGH QUALITY CHILDCARE, AFTERSCHOOL, AND SUMMER PROGRAMS**

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	TBD	\$ 1,980		\$ -	\$ -
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Alachua County Board of Commisioners	\$ 85,400	\$ 85,400	\$ -	\$ 85,400
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	A-Team Consulting & Training	\$ 24,992	\$ 24,992	\$ 15,193	\$ 9,799
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Boys & Girls Club of NE Florida	\$ 134,042	\$ 134,042	\$ 27,300	\$ 106,742
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Cade Museum for Creativity	\$ 16,268	\$ 16,268	\$ -	\$ 16,268
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Child Advocacy Center Enrichment	\$ 10,500	\$ 10,500	\$ -	\$ 10,500
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	City of Alachua	\$ 66,665	\$ 66,665	\$ -	\$ 66,665
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Community Impact Corporation	\$ 138,575	\$ 138,575	\$ 27,940	\$ 110,635

APPENDIX A - PROGRAM FUNDING

Item 5.

SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Cultural Arts Coalition	\$ 28,200	\$ 28,200	\$ -	\$ -
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Cultural Arts Coalition Enrichment	\$ 14,544	\$ 14,544	\$ 14,544	\$ -
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Deeper Purpose	\$ 91,500	\$ 91,500	\$ 42,150	\$ 49,350
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Empowerment Consultants & Associates	\$ 12,253	\$ 12,253	\$ 2,726	\$ 9,527
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Florida Musuem of Natural History Enrichment	\$ 22,080	\$ 22,080	\$ 7,760	\$ 14,320
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Gainesville Area Community Tennis ACES in Motion	\$ 66,925	\$ 66,925	\$ 9,481	\$ 57,444
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Gainesville Chamber Orchestra Enrichment	\$ 7,500	\$ 7,500	\$ -	\$ 7,500
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Gainesville Circus Center	\$ 25,200	\$ 25,200	\$ 15,920	\$ 9,280
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Girls Place	\$ 89,950	\$ 89,950	\$ 30,641	\$ 59,309
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Good News Arts	\$ 157,220	\$ 157,220	\$ 42,738	\$ 114,482
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Greater Duval Neighborhood Association	\$ 49,709	\$ 49,709	\$ 21,545	\$ 28,164
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Just for Us	\$ 33,000	\$ 33,000	\$ 7,875	\$ 25,125
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	I AM STEM	\$ 163,075	\$ 163,075	\$ 27,500	\$ 135,575
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Kids Count in Alachua County	\$ 32,700	\$ 32,700	\$ 1,730	\$ 30,970
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Motiv8U Enrichment	\$ 45,000	\$ 45,000	\$ 11,250	\$ 33,750
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	North Central YMCA	\$ 189,812	\$ 189,812	\$ -	\$ 189,812
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Santa Fe College	\$ 40,708	\$ 40,708	\$ -	\$ 40,708
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	St Barbara CFC Ministries	\$ 62,600	\$ 62,600	\$ 16,928	\$ 45,672
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Star Center Children's Theater	\$ 93,675	\$ 93,675	\$ -	\$ 93,675
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Traveling Art Camp	\$ 169,505	\$ 169,505	\$ 50,181	\$ 119,324
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	Underground Kitchen Enrichment	\$ 66,322	\$ 66,322	\$ 26,473	\$ 39,849
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	University of Florida CROP	\$ 47,860	\$ 47,860	\$ -	\$ 47,860
SUMMER CAMP & ENRICHMENT PROGRAMMING (2021-2024)	University of Florida Incugator	\$ 12,240	\$ 12,240	\$ -	\$ 12,240
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Gainesville Area Tennis Association (Aces in Motion)	\$ 188,443	\$ 188,443	\$ 177,815	\$ 10,628
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Kids Count in Alachua County, Inc.	\$ 143,025	\$ 143,025	\$ 88,306	\$ 54,719
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Boys and Girls Club of Alachua County	\$ 142,569	\$ 142,569	\$ 81,002	\$ 61,567
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Girls Place, Inc.	\$ 120,238	\$ 120,238	\$ -	\$ 120,238
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Gainesville Circus Center	\$ 95,539	\$ 95,539	\$ 95,539	\$ -
AFTERSCHOOL PROGRAMMING (RFP 2021-06)	Deeper Purpose Community Church, Inc.	\$ 72,175	\$ 72,175	\$ 65,790	\$ 6,385
AFTERSCHOOL PROGRAMMING (CONTRACT EXTENSION JUNE - SEPTEMBER)	TBD	\$ 260,000	\$ 260,000	TBD	\$ -
SUMMER PROGRAMMING (FREEDOM SCHOOL)	UF - College of Education Collaborative for Equity in Education	\$ 60,000	\$ 60,000	TBD	\$ -

STRATEGY 2.3 SUPPORT LITERACY AND OTHER ACADEMIC SUPPORTS

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
DOLLY PARTON IMAGINATION LIBRARY	Gainesville Thrive	\$ 14,000	\$ 14,000	\$ 5,535	\$ 8,465
THE BRIDGE COMMUNITY CENTER LITERACY PROGRAM	Vineyard Christian Fellowship of Gainesville, FL	\$ 42,690	\$ 42,688	\$ 28,459	\$ 14,229
OPERATION FULL STEAM*	Cade Museum	\$ 33,959	\$ 33,959	\$ -	\$ 33,959

STRATEGY 2.4 IMPROVE CAPACITY TO SUPPORT SPECIAL NEEDS

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
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STRATEGY 2.5 SUPPORT CAREER EXPLORATION AND PREPARATION

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
TEENSWORK ALACHUA	MINORITY BUSINESS LISTINGS, INC.	\$ 125,000	\$ 125,000	\$ 62,190	\$ 62,810
TEENSWORK ALACHUA	GOODWILL INDUSTRIES OF NORTH FLORIDA	\$ 125,000	\$ 125,000	\$ 11,941	\$ 113,059
TEENSWORK ALACHUA	GOODWILL INDUSTRIES OF NORTH FLORIDA	\$ 250,000	\$ 222,455	\$ -	\$ 222,455
TEENSWORK ALACHUA	CAI	\$ 250,000	\$ 223,455	\$ 8,019	\$ 215,436
NEW TECH NOW STEZAM ENGINE PROGRAM	New Technology Made Simple Now Inc	\$ 47,792	\$ 47,792	\$ 30,170	\$ 17,622

<b>GOAL 3: ALL CHILDREN HAVE NURTURING AND SUPPORTIVE CAREGIVERS AND RELATIONSHIPS</b>	<b>\$ 486,589</b>	<b>\$ 484,138</b>	<b>\$ 85,970</b>	<b>\$ 398,168</b>
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STRATEGY 3.1 SUPPपोर्ट INITIATIVES THAT CONNECT FAMILIES TO RESOURCES

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
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APPENDIX A - PROGRAM FUNDING

Item 5.

RFP 2021-07 HELP ME GROW ALACHUA	Children's Home Society of Florida	\$ 220,000	\$ 219,999	\$ 3,899	\$
FAMILY RESOURCE CENTERS/COMMUNITY NAVIGATORS	Partnership for Strong Families	\$ 191,589	\$ 189,139	\$ 57,733	\$ 131,406

STRATEGY 3.2 IMPROVE FAMILY STRENGTHENING AND SUPPORTS

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
PROJECT YOUTH BUILD PARENTING PROGRAM	FL Institute for Workforce Innovation, Inc. d/b/a Project YouthBuild	\$ 75,000	\$ 75,000	\$ 24,339	\$ 50,661
<b>GOAL 4: ALL CHILDREN LIVE IN A SAFE COMMUNITY</b>		<b>\$ 57,054</b>	<b>\$ 57,054</b>	<b>\$ 29,227</b>	<b>\$ 27,827</b>

STRATEGY 4.1 SUPPपोर्ट INJURY PREVENTION

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
			\$ -	\$ -	\$ -

STRATEGY 4.2 SUPPपोर्ट INITIATIVES THAT PREVENT DELINQUENCY /TRUANCY

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
BIG BROTHERS BIG SISTERS OF ALACHUA COUNTY	Big Brothers Big Sisters of Tampa Bay, Inc.	\$ 29,554	\$ 29,554	\$ 17,330	\$ 12,224

STRATEGY 4.3 SUPPपोर्ट VIOLENCE PREVENTION INITIATIVES

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
PEACEFUL PATHS INCREASING SERVICE VOLUME	Peaceful Paths, Inc.	\$ 27,500	\$ 27,500	\$ 11,897	\$ 15,604

COMMUNITY ENGAGEMENT

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
<b>SPONSORSHIPS</b>		<b>\$ 25,000</b>		<b>\$ 13,460</b>	<b>\$ 6,790</b>

<u>PROGRAM</u>	<u>AGENCY</u>	<u>Current Funding</u>	<u>Under Contract</u>	<u>Expensed</u>	<u>Remaining Budget</u>
		\$ 25,000		\$ -	\$ 6,790
42ND ANNUAL 5TH AVE ARTS FESTIVAL	CULTURAL ARTS COALITION		\$ 400	\$ 400	
BACK TO SCHOOL EVENT	HIGH SPRINGS CHAMBER		\$ 1,500	\$ 1,500	
BACK TO SCHOOL EVENT	EARLY LEARNING CENTER		\$ 1,000	\$ 1,000	
BALANCE 180	BALANCE 180 GYMNASTICS & SPORTS ACADEMY		\$ 260	\$ 260	
CELEBRATE THE CHILD EVENT	ALACHUA COUNTY CHILD ABUSE PREVENTION TASK FORCE UF		\$ 1,000	\$ 1,000	
CHILDRENS WEEK EVENT	CHILDRENS FORUM		\$ 1,000	\$ 1,000	
COATS FOR KIDS	SOAR MENTORING		\$ 300	\$ 300	
DANCE MARATHON	CHILDRENS MIRACLE NETWORK SHANDS TEACHING HOSPITAL		\$ 2,000	\$ 2,000	
FATHERHOOD SUMMIT A CALL TO ACTION	COMMUNITY IMPACT CORP		\$ 2,000	\$ 2,000	
SPRING FIELD DAY EVENT	VINEYARD		\$ 2,000	\$ 2,000	
STOP THE VIOLENCE EVENT JULY 30	COMMUNITY IMPACT CORP		\$ 2,000	\$ 2,000	
TEACH ME TO DANCE	BLSSD FUTURE		\$ 1,500	\$ 1,500	
VISIT UF TOURS JUNE 8	UF FOUNDATION		\$ 2,000	\$ 2,000	
SAFE KIDS EVENT	JUST BETWEEN FRIENDS		\$ 250	\$ 250	
ART FOR KIDS	NEW TECHNOLOGY MADE SIMPLE NOW		\$ 1,000	\$ 1,000	

Items in red not included in original annual budget.

REIMAGINE GAINESVILLE	\$ 50,000	\$ 50,000	\$ 50,000	\$ -
MATCH (* executed agreements under corresponding goal)	\$ 200,000	\$ 96,665	\$ 23,630	\$ 103,336
FY 22 BUDGETED GRANTS AND AID	\$ 5,014,315			
FY22 PROGRAM FUNDING BOARD APPROVED	\$ 6,360,251	\$ 5,794,434	\$ 1,865,176	\$ 3,743,014
(+/-)	\$ (1,345,936)	\$ (780,119)	\$ 3,149,139	\$ 1,271,301

**File Attachments for Item:**

6. July 2022 Checks and Expenditures Report





**Item:**

July 2022 Checks and Expenditures Report

**Requested Action:**

The Trust is asked to receive the report.

**Background**

Resolution 2020-2 requires that “All checks for expenditures or contracts which have not been expressly approved by the Trust shall be reported to the Trust on a monthly basis. The report may be under the consent agenda subject to being removed for further discussion.”

**Attachments**

July 2022 Bank Activity Report

**Programmatic Impact:**

NA

**Fiscal Impact:**

NA

**Recommendation:**

Receive the Report

# Children's Trust of Ala Cty LIVE

## Bank Account Activity Report

Reconciled & Un-Reconciled

From Date: 07/01/2022 - To Date: 07/31/2022

Bank	Bank Account
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Bank of America

Concentration Account

Deposits:	Date	Type	Deposit Information	Description	Department	Amount
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.  
No Transactions Exist

Checks:	Status	Check Number	Payment Date	Reconciled	Source	Payee Name	Amount
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.  
No Transactions Exist

EFTs:	Status	EFT Number	Payment Date	Reconciled	Source	Payee Name	Amount
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.  
No Transactions Exist

Returned Checks:	Date	Payer	Check Number	Amount
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.  
No Transactions Exist

Wire Transfers:	Type	Date	Vendor	Description	Internal Account	Amount
-----------------	------	------	--------	-------------	------------------	--------

.  
No Transactions Exist

Adjustments:	Type	Date	Description	Amount
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.  
No Transactions Exist

Bank of America

ZBA Accounts Payable

Deposits:	Date	Type	Deposit Information	Description	Department	Amount
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.  
No Transactions Exist

Checks:	Status	Check Number	Payment Date	Reconciled	Source	Payee Name	Amount
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Open	10916	07/07/2022	Accounts Payable	CFX OFFICE TECHNOLOGY OF GAINESVILLE	Item 6.
Open	10917	07/07/2022	Accounts Payable	Children's Forum	2,887.50
Open	10918	07/07/2022	Accounts Payable	Community Impact Corporation, Karl Anderson	27,940.00
Open	10919	07/07/2022	Accounts Payable	Empowerment Consultants & Associates, LLC	1,225.72
Open	10920	07/07/2022	Accounts Payable	GAINESVILLE AREA COMMUNITY TENNIS ASSOCIATION	7,500.00
Open	10921	07/07/2022	Accounts Payable	Gainesville Circus Center Inc	6,539.13
Open	10922	07/07/2022	Accounts Payable	Goodwill Industries of North Florida	11,940.95
Open	10923	07/07/2022	Accounts Payable	KIDS COUNT IN ALACHUA COUNTY, INC.	10,452.56
Open	10924	07/07/2022	Accounts Payable	Level Up Impact Group, LLC	4,000.00
Open	10925	07/07/2022	Accounts Payable	Minority Business Listings Inc	19,697.22
Open	10926	07/07/2022	Accounts Payable	Motiv8U of North Central Florida Inc	2,499.99
Open	10927	07/07/2022	Accounts Payable	PACE CENTER FOR GIRLS INC	13,331.73
Open	10928	07/07/2022	Accounts Payable	Shands Teaching Hospital and Clinics, Inc.	25,507.48
Open	10929	07/15/2022	Accounts Payable	ALACHUA COUNTY BOCC	9,142.24
Open	10930	07/15/2022	Accounts Payable	BANK OF AMERICA	182.96
Open	10931	07/15/2022	Accounts Payable	CDW GOVERNMENT	1,662.00
Open	10932	07/15/2022	Accounts Payable	Childrens Home Society of FL	7,036.50
Open	10933	07/15/2022	Accounts Payable	Computer Aid Inc	8,019.00
Open	10934	07/15/2022	Accounts Payable	CULTURAL ARTS COALITION INC.	14,544.00
Open	10935	07/15/2022	Accounts Payable	GAINESVILLE REGIONAL UTILITIES	700.00
Open	10936	07/15/2022	Accounts Payable	HEALTHY START OF NORTH CENTRAL FL	9,903.54
Open	10937	07/15/2022	Accounts Payable	Larry Brown DBA Clubhouse Athletics	1,537.50
Open	10938	07/15/2022	Accounts Payable	St. Barbara CFC Ministries	3,428.46
Open	10939	07/15/2022	Accounts Payable	University of Florida Board of Trustees	2,240.00
Open	10940	07/15/2022	Accounts Payable	VINEYARD CHRISTIAN FELLOWSHIP OF GAINESVILLE, INC	4,743.15
Open	10941	07/22/2022	Accounts Payable	A-Team Consulting & Training Inc	8,853.50
Open	10942	07/22/2022	Accounts Payable	Ameris Bank	3,171.75
Open	10943	07/22/2022	Accounts Payable	CE's Underground Kitchen	9,927.27
Open	10944	07/22/2022	Accounts Payable	EARLY LEARNING COALITION OF ALACHUA COUNTY, INC.	7,563.90
Open	10945	07/22/2022	Accounts Payable	Gainesville Circus Center Inc	3,837.07
Open	10946	07/22/2022	Accounts Payable	Good News Arts Inc	7,222.15
Open	10947	07/22/2022	Accounts Payable	Gray Media Group DBA WJCB	3,750.00
Open	10948	07/22/2022	Accounts Payable	Greater Duval Neighborhood Association	13,743.72
Open	10949	07/22/2022	Accounts Payable	HEALTHY START OF NORTH CENTRAL FL	27,325.94
Open	10950	07/22/2022	Accounts Payable	Minority Business Listings Inc	17,009.19
Open	10951	07/29/2022	Accounts Payable	ALACHUA COUNTY BOCC	4,560.93
Open	10952	07/29/2022	Accounts Payable	Allegra Gainesville	303.13
Open	10953	07/29/2022	Accounts Payable	Deeper Purpose Community Church Inc	27,911.73
Open	10954	07/29/2022	Accounts Payable	EARLY LEARNING COALITION OF	1,000

Status	EFT Number	Payment Date	Reconciled	Source	Payee Name	Amount
Open	10955	07/29/2022		Accounts Payable	ALACHUA COUNTY, INC. GAINESVILLE AREA COMMUNITY TENNIS ASSOCIATION	30 <span style="border: 1px solid black; padding: 2px;">Item 6.</span>
Open	10956	07/29/2022		Accounts Payable	Gainesville Circus Center Inc	9,471.98
Open	10957	07/29/2022		Accounts Payable	GAINESVILLE REGIONAL UTILITIES	1,146.44
Open	10958	07/29/2022		Accounts Payable	GIRLS PLACE, INC.	30,641.00
Open	10959	07/29/2022		Accounts Payable	Howard Industries Inc d.b.a. Howard Technologies	1,509.00
Open	10960	07/29/2022		Accounts Payable	NEW TECHNOLOGY MADE SIMPLE NOW, INC.	13,945.81
Open	10961	07/29/2022		Accounts Payable	PACE CENTER FOR GIRLS INC	4,482.20
Open	10962	07/29/2022		Accounts Payable	Partnership for Strong Families	9,124.06
Open	10963	07/29/2022		Accounts Payable	Traveling Art Camp LLC	16,285.00
						\$450,086.58

**EFTs:**

Status	EFT Number	Payment Date	Reconciled	Source	Payee Name	Amount
.						
Open	153	07/06/2022		Accounts Payable	Health Equity Inc	77.35
Open	156	07/06/2022		Accounts Payable	Florida Retirement System	6,609.45
Open	155	07/18/2022		Accounts Payable	Health Equity Inc	45.00
						\$6,731.80

**Returned Checks:**

Date	Payer	Check Number	Amount
.			
No Transactions Exist			

**Wire Transfers:**

Type	Date	Vendor	Description	Internal Account	Amount
.					
No Transactions Exist					

**Adjustments:**

Type	Date	Description	Amount
.			
No Transactions Exist			

**File Attachments for Item:**

7. July 2022 Budget Review



**Item:**

July 2022 Budget Review

**Requested Action:**

The Trust is asked to receive the 1<sup>st</sup> Quarter Budget Review

**Background**

Board Policy 3.50 requires that “the CTAC will perform quarterly reviews to determine if the budgetary plan is being followed and if budgetary expectations are being achieved. Any problems discovered in this process will be corrected at the appropriate level of budgetary control.”

**Attachments**

July 2022 Budget by Fund Report

**Programmatic Impact:**

NA

**Fiscal Impact:**

NA

**Recommendation:**

Receive the Report

Children's Trust of Ala Cty LIVE  
**Budget by Fund Category Report**  
 07/31/2022  
 Prior Fiscal Year Activity Included

Account Classification	Adopted Budget	Budget Amendments	Amended Budget	Current Month Transactions	YTD Encumbrances	YTD Transactions	Budget - YTD Transactions	% Used/ Rec'd	Prior Year Total
<b>1 - Governmental Funds</b>									
<b>Revenue</b>									
31 - TAXES	\$8,249,047.00	\$0.00	\$8,249,047.00	\$0.00	\$0.00	\$8,255,715.88	(\$6,668.88)	100%	\$7,801,760.08
33 - Intergovernmental Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+++	\$75,000.00
34 - Charges for Services	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	+++	\$0.00
36 - Miscellaneous Revenue	\$83,333.00	\$0.00	\$83,333.00	\$0.00	\$0.00	\$58,224.92	\$25,108.08	70%	\$97,597.74
38 - Other Sources	\$100,000.00	\$0.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$100,000.00	0%	\$352,879.48
<b>Revenue Totals</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$8,313,940.80</b>	<b>\$118,439.20</b>	<b>99%</b>	<b>\$8,327,237.30</b>
<b>Expense</b>									
10 - Personnel Services	\$1,056,387.00	\$0.00	\$1,056,387.00	\$0.00	\$0.00	\$745,535.43	\$310,851.57	71%	\$649,418.30
20 - Operating Expenses	\$1,199,226.00	\$0.00	\$1,199,226.00	\$25,529.31	\$79,709.72	\$780,577.81	\$338,938.47	72%	\$710,562.68
30 - Capital Outlay	\$0.00	\$93,599.00	\$93,599.00	\$1,509.00	\$25,882.00	\$66,372.00	\$1,345.00	99%	\$0.00
50 - Grants and Aid	\$5,014,315.00	\$0.00	\$5,014,315.00	\$329,960.24	\$3,683,419.75	\$1,813,966.49	(\$483,071.24)	110%	\$2,277,956.95
60 - Other Uses	\$1,162,452.00	(\$93,599.00)	\$1,068,853.00	\$0.00	\$0.00	\$0.00	\$1,068,853.00	0%	\$338,667.00
<b>Revenue Totals:</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$8,313,940.80</b>	<b>\$118,439.20</b>	<b>99%</b>	<b>\$8,327,237.30</b>
<b>Expenditure Totals:</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$8,432,380.00</b>	<b>\$356,998.55</b>	<b>\$3,789,011.47</b>	<b>\$3,406,451.73</b>	<b>\$1,236,916.80</b>	<b>85%</b>	<b>\$3,976,604.93</b>
<b>1 - Governmental Funds Net Totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$356,998.55)</b>	<b>(\$3,789,011.47)</b>	<b>\$4,907,489.07</b>	<b>(\$1,118,477.60)</b>		<b>\$4,350,632.37</b>
<b>Revenue Grand Totals:</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$8,313,940.80</b>	<b>\$118,439.20</b>	<b>99%</b>	<b>\$8,327,237.30</b>
<b>Expenditure Grand Totals:</b>	<b>\$8,432,380.00</b>	<b>\$0.00</b>	<b>\$8,432,380.00</b>	<b>\$356,998.55</b>	<b>\$3,789,011.47</b>	<b>\$3,406,451.73</b>	<b>\$1,236,916.80</b>	<b>85%</b>	<b>\$3,976,604.93</b>
<b>Grand Totals:</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>(\$356,998.55)</b>	<b>(\$3,789,011.47)</b>	<b>\$4,907,489.07</b>	<b>(\$1,118,477.60)</b>		<b>\$4,350,632.37</b>

**File Attachments for Item:**

8. Board Meeting Evaluation - Survey Results from 07-25-2022





### **Summary of Board Meeting Evaluation Surveys**

Per Board Policy 1.15, at each meeting, Board members will be given the opportunity to evaluate the effectiveness and efficiency of meetings and provide suggestions as to how to improve and make the best use time during Board meetings. The following is a summary of the input Board members provided for review by the Board, CTAC staff, and members of the public regarding the most recent Board meeting.

<b><u>Date of Meeting:</u></b>	<b>July 25, 2022</b>
<b><u>Completion Rate:</u></b>	<b>50% of Board members completed (5 of 10)</b>


### **Evaluation of Meeting Components:**

Board members rate effectiveness and efficiency of four components from 1 to 4. Ratings signify 1 = “poor”, 2 = “fair”, 3 = “good”, and 4 = “excellent”. All meeting components received ratings of “excellent” for this particular meeting. The July 25<sup>th</sup> meeting was intentionally short to allow time to setup for a Meet and Greet event for members of the public to meet the Executive Director candidates, which occurred after the Board meeting. The meeting was approximately 20 minutes in duration with 8 agenda items.

<b>Meeting Component</b>				
<b>Date of Meeting</b>	<b>Materials Provided</b>	<b>Meeting Facilitation</b>	<b>CTAC Staff</b>	<b>Presentations</b>
<b>July 25, 2022</b>	<b>4.00</b>	<b>4.00</b>	<b>4.00</b>	<b>4.00</b>
<b>July 11, 2022</b>	<b>3.57</b>	<b>3.86</b>	<b>3.86</b>	<b>3.86</b>
<b>Average Rating (January-June)</b>	<b>3.63</b>	<b>3.73</b>	<b>3.83</b>	<b>3.60</b>

**Materials Provided** (The Board packet was received in a timely fashion and provided the information needed to prepare for the meeting)


Member Name	Rating	Average Rating
Andrew	4	4.00
Cornell	4	
Ferrero	4	
Pinkoson	4	
Twombly	4	



**Comments:** None received.

**Meeting Facilitation** (The Chair ensured Board members and members of the public who wanted to speak had the opportunity to be heard)


Member Name	Rating	Average Rating
Andrew	4	4.00
Cornell	4	
Ferrero	4	
Pinkoson	4	
Twombly	4	



**Comments:** None received.

**CTAC Staff** (CTAC staff were knowledgeable on their agenda items and prepared to address questions, or provide a plan for follow-up)


Member Name	Rating	Average Rating
Andrew	4	4.00
Cornell	4	
Ferrero	4	
Pinkoson	4	
Twombly	4	



**Comments:** None received.

**Presentations** (Presentations were helpful in providing information on programs and policies to guide decision-making and allow for input and transparency)

Member Name	Rating	Average Rating
Andrew	4	4.00
Cornell	4	
Ferrero	4	
Pinkoson	4	
Twombly	4	



**Comments:**

- We appreciate the provider sharing information about their program. (Twombly).

Board members were given the opportunity to provide general comments on the meeting overall as well as topics they’d like to see addressed on future agendas. The only comment received in this section was “Great short meeting!”

**General Comments:**

- Great short meeting! (Pinkoson).

**Are there any items, presentations, or other information you would like placed on a future Board agenda?**

- None received.

**File Attachments for Item:**

9. Employment Agreement between CTAC and Marsha Kiner

**EMPLOYMENT AGREEMENT BETWEEN  
CHILDREN’S TRUST OF ALACHUA COUNTY  
AND MARSHA KINER**

THIS AGREEMENT, made and entered into this \_\_\_\_ day of \_\_\_\_\_, AD., 2022, by and between the Children’s Trust of Alachua County, an independent special district located in Alachua County, Florida, hereinafter referred to as the “CTAC,<sup>1</sup>” and Marsha Kiner, hereinafter referred to as the “Director” (and together with CTAC, the “Parties”) and is effective on October 3<sup>rd</sup>, 2022;

WITNESSETH:

WHEREAS, CTAC desires to employ an Executive Director to serve as CTAC’s chief executive officer; and

WHEREAS, CTAC desires to employ the services of Marsha Kiner as Executive Director; and,

WHEREAS, it is the desire of CTAC to provide certain benefits and establish certain conditions of employment for the Executive Director; and

WHEREAS, it is the desire of CTAC to secure and retain the services of Marsha Kiner as the Executive Director and to provide inducement for the Director to remain in such employment, to make possible full work productivity by assuring the Director’s morale and peace of mind with respect to future security, to act as a deterrent against malfeasance or dishonesty for personal gain on the part of the Director, and to provide a just means for terminating the Director’s services at such time as the Director may not be able to fully discharge the duties or when CTAC may otherwise desire to terminate the Director’s employment; and

\_\_\_\_\_  
<sup>1</sup> Depending on the context the term “CTAC” may refer to the District or alternatively to its governing board.

WHEREAS, Marsha Kiner desires to accept employment as Executive Director of the CTAC; and

NOW, THEREFORE, in consideration of the mutual covenants contained herein, the Parties agree that this Agreement supersedes and replaces any prior agreement or negotiations with the Director, and further agree as follows:

**Section 1. Appointment.** CTAC appoints Marsha Kiner as Executive Director effective October 3<sup>rd</sup> 2022, to perform the functions and duties specified in the Alachua County Code and the [job posting] and to perform such other legally permissible and proper duties and functions as CTAC shall from time to time assign.

**Section 2. Duties and Obligations.**

A. Director shall exercise those powers enumerated in Florida Statute Section 125.901 and Alachua County Code Section 26.03 as directed by CTAC, and shall perform any other legally permissible and proper duties and functions as may be assigned by CTAC. Specifically, the Director shall be responsible for the management, administration, supervision, and oversight of all CTAC programs that presently exist or that may be created by CTAC. The Director shall be available to perform such duties and agrees to be available as needed. All duties required hereunder shall be performed by the Director personally or through the assistance of CTAC employees, assigned to the Director's staff concerning which the Director shall assume full responsibility; provided, however that nothing herein shall be deemed to absolve the Director of personal responsibility for the duties set forth herein.

B. Residence. As a condition of continued employment, the Director shall reside in Alachua County within six (6) months of the date of her appointment.

**Section 3. Employment at Will.**

A. The Director serves at the pleasure of CTAC. This Agreement shall commence on October 3<sup>rd</sup> 2022, and continue indefinitely until the Director's employment is terminated by either party pursuant to the provisions of Sections 4 or 5, below.

B. If the Director's employment is terminated pursuant to Section 4, herein, upon mutual consent of the Parties, the Director may continue to function in the role of Director until a permanent replacement shall be selected by CTAC, or through such period as the Parties agree. In the absence of such mutual Agreement, the Director shall be free of all obligations of service to CTAC.

C. Nothing in this Agreement shall prevent, limit or otherwise interfere with the right of CTAC to terminate the employment of Director at any time, subject only to the provisions set forth in Section 4 of this Agreement.

D. Nothing in this Agreement shall prevent, limit or otherwise interfere with the right of the Director to resign at any time from the employment with CTAC, subject only to the provisions set forth in Section 5 of this Agreement.

E. Director serves as an at will employee of the CTAC and may be terminated at any time, subject to the conditions set forth herein. Nothing in this Agreement is intended to create a continuing contract under Section 121.055, Fla. Stat.

**Section 4. Termination and Severance Pay.**

A. CTAC may, at any time whatsoever, for any reason, terminate the employment of the Director in accordance with the provisions of the Bylaws. If such event should occur, the Director will be given written notice of the decision of CTAC not less than 30 calendar days prior to the effective date of the termination of the employment. In lieu of written notice CTAC may pay the Director 30 calendar days of salary at her base rate. The Director, will be entitled to a lump-sum severance payment equal to 12 weeks of base salary following the effective date of termination. Payment of any amount representing salary or calculated based upon salary as part of any severance or separation agreement shall include such deductions as may be required by law including contributions for the Florida State Retirement System.

B. CTAC shall not be required to pay the severance payments set forth in Section 4.A. above, in the event this Agreement is terminated by CTAC because of the Director's conviction (or plea of guilty or nolo contendere) of any felony act, or because of the Director's misconduct as defined in Section 443.036(29), Florida Statutes, or because of the Director's death or voluntary resignation pursuant to Section 5, herein. The interpretation of the terms will be as stated on the face of the statute, in the common understanding of the terms, and not in caselaw interpreting them in the context of reemployment assistance.

**Section 5. Resignation.** In the event the Director voluntarily resigns the position with CTAC, the Director hereby agrees to give CTAC not less than 60 calendar day written notice prior to the effective date of any voluntary resignation and there is no severance pay due unless the Parties agree otherwise. CTAC is not under any obligation to require the Director to work out the 60 day notice nor under any obligation to pay for any notice which is not worked out.



**Section 6. Compensation.** CTAC shall pay the Director an annual base salary of One Hundred Twenty-Five Thousand dollars [**\$125,000**], payable in biweekly installments pursuant to CTAC policy. This base salary shall be reviewed annually subject to Section 11, Performance Evaluation. The salary may be increased in such amounts and to such an extent as CTAC may, determine based on annual review of the Director's performance. The first performance review is due in the year 2023 on, or shortly after, the anniversary of her hire.

**Section 7. Other Benefits.**

A. Leave. Except as may be amended by this Agreement, Director shall be entitled to leave, holidays and such other benefits as are granted generally to other employees of the CTAC. The Director shall be entitled to begin with three weeks annual leave accrued and available when she commences employment. The Director shall be allowed to accrue and accumulate leave in accordance with CTAC leave policy. Upon separation from employment as Director, the Director shall be entitled to be paid for accrued leave at the Director's rate of pay on the effective date of separation in accordance with adopted CTAC policy.

B. Florida Retirement System. In addition to the base salary paid by CTAC to the Director, will participate in the Florida Retirement System as a member of the senior management class and CTAC will pay the required employer's contribution on behalf of the Director once she has been enrolled in the system in that class.

C. Vehicle Allowance. CTAC shall pay the Director a \$300 (three hundred dollar) monthly car allowance. Such allowance is designed to reimburse the Director for all costs associated with the use of the Director's vehicle for CTAC business. Any additional compensation for travel expense must be approved by the CTAC upon request by the Executive Director.

D. Health Insurance. The Director shall have the opportunity to participate in the health plan as available to CTAC employees at the same cost to the Director as provided to employees of the CTAC which coverage currently includes medical, dental and optical insurance.

E. Technology. CTAC shall provide Director with the use of a smart phone, subject to applicable CTAC policies and procedures.

F. Other Benefits. The Director shall have the opportunity to participate in such other benefits as are granted to other employees of the CTAC at the same cost to the Director as provided to other CTAC employees.

**Section 8. No Reduction of Benefits.** CTAC shall not at any time during the term of this Agreement reduce the salary, compensation, or other financial benefits of the Director, except to the degree of such a reduction for all CTAC employees, provided, however, CTAC shall not be required to hold the Director harmless from reductions imposed by the State.

**Section 9. Continuing Education and Memberships.**

A. CTAC agrees to pay for the professional dues and subscriptions of the Director necessary for the Director's continued and full participation in national, state and local associations and organizations necessary and desirable for the Director's professional development. Such expenditures are based upon budget approval by CTAC. The Parties recognize that the Director's participation in professional organizations and associations provides a benefit to both CTAC and the Director.

B. The Parties agree that it is necessary for the Director and beneficial to CTAC for the Director to attend professional conferences and training sessions associated with the Director's duties. CTAC agrees to allow the Director to attend professional association conferences or training sessions as selected by the Director and to pay the travel expenses of the Director pursuant

to CTAC's travel policy, and Section 112.061, Fla. Stat. Such expenditures are based upon budget approval by CTAC and shall be reported to the CTAC.

**Section 10. Outside Activities.** The Director agrees to devote all the Director's full working time to the performance of the responsibilities and duties under this Agreement and agrees not to engage in other paid employment without the prior consent of CTAC. This provision shall not include occasional teaching, writing or consulting during the Director's time off. The Director shall disclose to CTAC the terms of such teaching, writing, and consulting engagements.

**Section 11. Performance Evaluation.** CTAC shall review and evaluate the performance of the Director at least once each year beginning on or near the anniversary of her hire in 2023.. At such time the CTAC may increase base salary and/or other benefits of the Director in such amounts and to such extent as it may determine that it is desirable to do so, considering the performance by the Director.

**Section 12. Suspension.** CTAC may suspend the Director with full pay and benefits at any time during the term of employment in accordance with the policies of the CTAC.

**Section 13. Bonding.** CTAC shall bear the full cost of any fidelity or other bonds required of the Director under any law or ordinance.

**Section 14. Liability Insurance.** CTAC shall provide for and maintain at its expense comprehensive liability insurance, including public officials employment liability insurance, covering the acts or omissions of the Director pursuant to this Agreement. Insurance coverage through CTAC's participation in a self-insurance fund program fulfills the requirements of this paragraph.

**Section 15. Indemnification.** If allowed by law, CTAC, subject to approval in a public meeting defend, hold harmless and indemnify the Director against any tort, professional liability

claim or demand or other legal action, whether groundless or otherwise, arising out of an alleged act or omission occurring within the course and scope of the performance of the duties as Director. CTAC will settle or litigate any such claim or suit and pay the amount of any settlement or judgment rendered thereon. Said indemnification shall extend beyond termination of employment, to provide full and complete protection to the Director, by CTAC as described herein, for any acts undertaken or committed in the performance of the duties as Executive Director, regardless of whether the notice or filing of a lawsuit for such tort, claim, demand, ethics complaint or other legal action occurs during or following Marsha Kiner's employment with the Trust. The protections of this paragraph regarding indemnification do not extend to those situations where there has been a finding of criminal activity, actions taken in bad faith or violations of civil rights in cases where CTAC would not otherwise be liable.

**Section 16. Entire Agreement.** The text of this document shall constitute the entire Agreement between the Parties, except as may be amended in writing by the parties hereto. All provisions contained in this Agreement are subject to and conditioned upon compliance with general laws, special laws of the State of Florida, and local ordinances. Such laws shall take precedence over any part or portion of this Agreement.

**Section 17. Non-assignment.** The duties required to be performed hereunder by the Director, and all rights and obligations under this Agreement in favor of the Director, are personal and are not assignable.

**Section 18. Severability.** If any provision, or any portion thereof, contained in this Agreement is held to be unconstitutional, invalid, or unenforceable, the remainder of this Agreement or portion thereof shall be deemed severable, shall not be affected, and shall remain in full force and effect.

**Section 19. Amendment.** This Agreement shall not be amended except in writing and executed by both parties hereto.

IN WITNESS WHEREOF, the parties have caused this Executive Director Employment Agreement to be executed for the uses and purposes therein expressed on the day and year first above written.

**CTAC:**

CHILDREN’S TRUST OF ALACHUA COUNTY

By: \_\_\_\_\_  
Margarita Labarta, Chair

ATTEST:

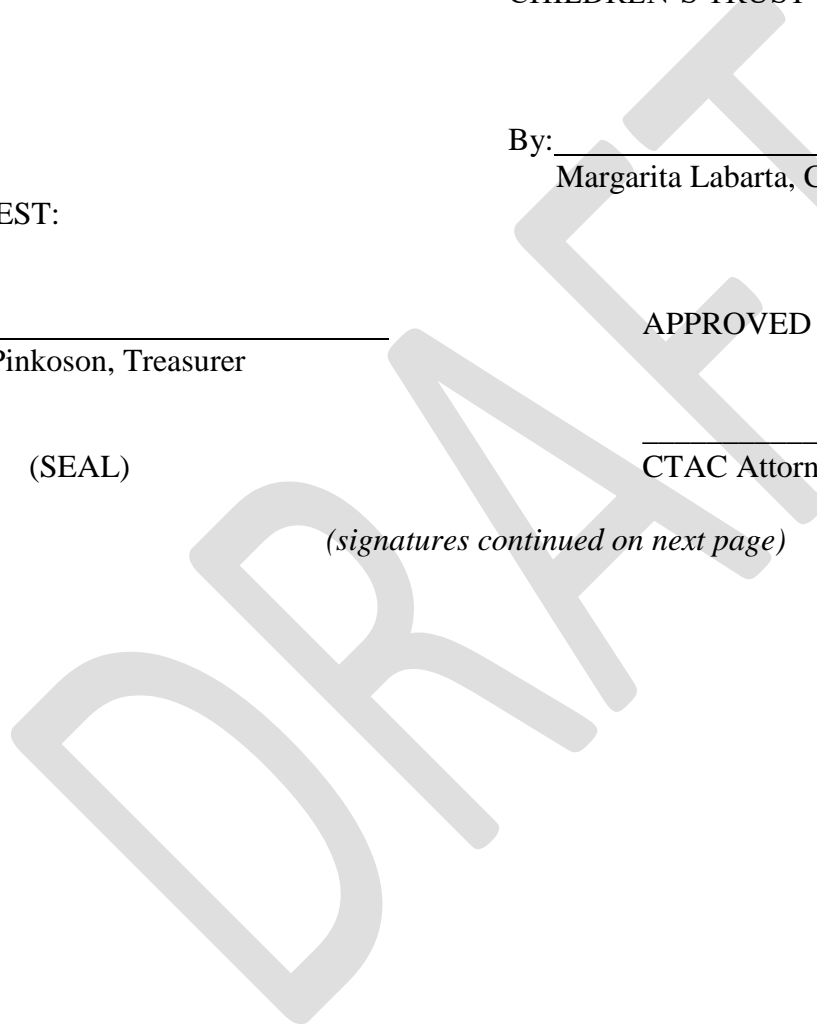
\_\_\_\_\_  
Lee Pinkoson, Treasurer

APPROVED AS TO FORM

(SEAL)

\_\_\_\_\_  
CTAC Attorney

*(signatures continued on next page)*



**DIRECTOR:**

By: \_\_\_\_\_  
Marsha Kiner

Witness #1 as to Director:

Witness #2 as to Director:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

DRAFT

**File Attachments for Item:**

10. 8.8.22 ED Report



## EXECUTIVE DIRECTOR REPORT

July 4, 2022 – July 31, 2022

### SUMMARY

**Highlight for the Month:**

1. Partnership with the Early Learning Coalition of Alachua County to support Accreditation Academy
2. Children's Defense Fund designate Alachua County's Freedom School as a "Model Site"



<b>MEETINGS AND EVENTS FOR PLANNING, COORDINATION, AND COMMUNITY ENGAGEMENT</b>		
<b>DATE</b>	<b>MEETING / EVENT</b>	<b>SUMMARY</b>
7/2/22	Soar Mentoring Services-East Gainesville BBQ cook-off event	Sponsored East Gainesville BBQ Cook-off event to embrace diversity, equity and inclusion and offer families a fun event that encourages safe communities.
7/6/22	Early Childhood Professional Track Planning Committee	Meeting with Greater Gainesville Chamber, BLI, and the CTAC to discuss the Cohort 1 Master Class graduation.
7/7/22	PN-3 Asset Mapping in Florida and local communities	Meeting on asset mapping and gap analysis of PN-3 in Florida with Nemours Children's Health, Barancik Foundation, and FSU Center for Prevention and Early Intervention Policy.
7/7/22	Help Me Grow Outreach Material 101	Staff training conducted by Help Me Grow Florida on the use and availability of outreach material.
7/8/22	Help Me Grow Alachua	Staff meeting with Help Me Grow Alachua Supervisor.
7/8/22	One More Child Single Moms Home	Site visit at One More Child newest Single Moms Home.
7/9/22	Digital Magic: Art for Kids in Archer	Sponsored Digital Magic: Art for Kids to offer students and families the opportunity to create digital artwork with their children in Archer. Shared CTAC resources and information with families.
7/12/22	National Night Out committee meeting	Staff joined the committee to support the upcoming National Night Out event.

7/12/22	Fifth Ave Neighborhood Association monthly meeting	Hosted Fifth Ave Neighborhood Association meeting at CTAC. Presentations made by Gainesville Housing. Councilwoman Duncan-Walker was present and there was a community update by GPD.
7/13/22	System Mapping Meeting	Progress meeting with Kallen Shaw on system map for PN-5.
7/14/22	ELC of Alachua County Quality Meeting	ELC Quality initiatives review.
7/15/22	Implementation Science Presentation and Discussion	Isandra Zayas, Program Exploration and Implementation Lead at the Children's Services Council of Palm Beach County gave a presentation on the Active Implementation Science Framework.
7/16/22	ELC's Back to School event	Sponsored ELC's Back to School event. Shared CTAC resources and information with families.
7/18/22	Freedom School event	In recognition of National Summer Reading, we hosted an activity at Freedom School. Kristy read to children and the media featured the amazing story.
7/18/22	BLI Meeting	Meeting with staff from BLI to review graduation plan.
7/18/22	Pritzker Grant Partner's Meeting with WIC	Discussion of local implementation and successes and barriers. Review of 6 months of WIC data and outcomes.
7/19/22	GEZ Family Learning Center Site Visit	Site visit and meeting with staff to discuss plans for the center.

7/20/22	Meeting with US House Representative Congresswoman Kat Cammack staff	Meeting with staff members from Kat Cammack office, US House Representative for Florida's 3rd Congressional District. We thanked staff for working with CTAC to provide us with certificates that will be presented to BLI graduates.
7/20/22	Meridian Community Advisory Committee	Participated in Meridian's initial Community Advisory Committee. Meridian is seeking to strengthen community relationships, improve quality of services, and reputation.
7/20/22	ELC of Alachua County Board of Directors	ELC board meeting.
7/25/22	Executive Director meet and greet - Day 1	The Trust hosted a meet and greet for community members to have an opportunity to meet the ED candidates.
7/26/22	Executive Director meet and greet - Day 2	The Trust hosted a meet and greet for community members to have an opportunity to meet the ED candidates.
7/26/22	Pritzker Grant Partner Meeting with ELC	Discussion of ELC numbers for the fiscal year and within the last 6 months. Discussed the reason for increases in the number of infants and toddlers.
7/27/22	United Way Express Bus Tour	Participated in the United Way Express Bus Tour to learn more about Gainesville Eldercare Facility, Pace Center for Girls, Child Advocacy Center and United Way. Networking opportunity with the 20 members of the community who participated.

7/27/22	Pritzker Grant Partner Meeting with Healthy Start and WellFlorida.	Reviewed Newborn and Family Partner data and needs within the last 6 months. Would like to duplicate the Family partner model to other practices. Discussed the state's Fatherhood initiative and FIMR plan.
7/28/22	PRG Advisory meeting	Meeting to discuss list of applicants interested in seeking funding from PRG.
7/28/22	Data Technical Advisory Committee	The Trust hosted its fifth committee meeting to brainstorm and develop agreed upon data collection and management policies for the Trust.
7/30/22	23rd Annual Stop the Violence Back to School Rally at Santa Fe College.	Sponsored 23rd Annual Stop the Violence Back to School Rally at Santa Fe College. Participating in tabling event to provide resources and information for families.

## PROGRAMS Calendar

PROGRAMS CALENDAR (CALENDAR FOR THE PREVIOUS MONTH AND THE UPCOMING MONTH)	
July	
Wednesday, July 6, 2022	Early Childhood Professional Conference Planning Meeting
Thursday, July 7, 2022	Campaign for Grade Level Reading Meeting
Thursday, July 7, 2022	Media highlight for Gainesville Circus Center camp
Thursday, July 7, 2022	Help Me Grow Outreach Material 101 Training
Friday, July 8, 2022	Pritzker Children Initiative Fellows Meeting
<b>Monday, July 11, 2022 BOARD MEETING</b>	<b>TeensWork Alachua presentation, NewboRN Home Visiting and Maternal Family Partner presentation and Afterschool</b>
Wednesday, July 13, 2022	Catalyst for Change and Education Foundation of Alachua County
Wednesday, July 13, 2022	Pritzker Children's Initiative Grant Check In Meeting
Friday, July 15, 2022	Implementation Science presentation and discussion
Friday, July 15, 2022	National Collaborate for Infants and Toddlers - Alachua Meeting
Friday, July 15, 2022	Listening Project ITN responses due and bid opening
Monday, July 18, 2022	Pritzker Grant partners meeting
Wednesday, July 20, 2022	ALL IN Gainesville Conference and BLI Graduation
Thursday, July 28, 2022	Data Technical Advisory committee meeting
July 18-22, 2022	Listening Project - Application review period
July 26-27, 2022	Listening Project - Applicant Interviews
July 28-29, 2022	Listening Project - Public Evaluation of Applications
August	
Tuesday, August 2, 2022	Pritzker Children's Initiative Fellows Meeting
Wednesday, August 3, 2022	Data System Check-In with CTAC and ELC Staff
Wednesday, August 3, 2022	M-CHAT Training with Help Me Grow Florida
Thursday, August 4, 2022	Campaign for Grade Level Reading Meeting
Thursday, August 5, 2022	Programs Team Meeting
Friday, August 5, 2022	Help Me Grow Alachua Bi Weekly Meeting
<b>Monday, August 8, 2022 BOARD MEETING</b>	<b>Listening Project Discussion and Programs Update</b>
Friday, August 12, 2022	PCI and Community Fellow Meeting
Tuesday, August 16, 2022	Grant Interim Report Meeting with Pritzker Children's Initiative
Friday, August 19, 2022	Help Me Grow Alachua Bi Weekly Meeting
Friday, August 19, 2022	National Collaborate for Infants and Toddlers - Alachua Meeting
Friday, August 26, 2022	Freedom School Promotional Video

## PLANNING, RESEARCH, AND EVALUATION

**Data System Exploration** – Met with one additional software vendor to learn more about product solutions for data collection, information management, workflow, and reporting. Researching in detail products capabilities, usability, security features, and cost to determine which would be the best fit for the Trust and its providers.

**Data Technical Advisory Committee** – The DTAC continues to meet monthly with its most recent meeting on July 28<sup>th</sup>. The committee discussed and came to agreement on several topics to be included in our data collection and management policy including what data elements will be collected, our approach, data sharing, informing participants, and data security. Committee members are currently reviewing an initial draft policy to be reviewed and finalized during our August 25<sup>th</sup> meeting. Final results will be presented to the Board during the September 26<sup>th</sup> Board meeting.

**Listening Project ITN** – Reviewed and rated four (4) Listening Project proposals received; attended the Public Evaluation of the Proposal along with other raters to discuss and reach consensus on the bid that would best achieve the Trust’s vision and intended results for this scope of work. Reviewing similar project work ([Leon County Needs Assessment](#)) and local data that will help support this work as well as the strategic plan.

**Summer Camp** – Monitoring summer camp data and reporting and supporting consistency in processes and documentation efforts. As a team we’ve completed about two dozen summer camp site visits thus far.

**Afterschool** – Completed Afterschool Summary Report summarizing the results from demographic, attendance, provider and family surveys. Presented findings to the Board and shared with Providers.

**TeensWork Alachua** – Executed satisfaction surveys with teens and supervisors; providing one-on-one support to providers to ensure data deliverables are being completed as expected.

**Implementation Science** – On July 15<sup>th</sup> Children’s Trust team participated in a professional development opportunity with Isandra Zayas – Program Exploration and Implementation Science Lead – from the Children's Services Council of Palm Beach County who presented and provided resources on Implementation Science, and specifically the Active Implementation Framework.

## FINANCE AND ADMINISTRATION

1. Programmatic Award & Expense Report
2. July Checks and Expenditures Report
3. Budget by Fund Report YTD July 31, 2022

## COMMUNICATIONS

Communications Report: July 1, 2022 – July 30, 2022

### Website Traffic – Key Points

· Page Views	4,708
· New Users	1,180

### Most Viewed Web Pages

· Home Page	914
· Regular Meeting	356
· Meetings	278
· Bids/RFPs	239
· Program Directory	224

### Followers

· Constant Contact	1,264
· Facebook	986
· Twitter	201
· Instagram	199
· LinkedIn	126

### In the News

- [VIDEO: Children’s Trust of Alachua County names new executive director – WCJB – July 27, 2022](#)
- [Kiner selected new head of Children’s Trust - Main Street Daily News - July 27, 2022](#)
- [Children's Trust of Alachua County selects new executive director. She's no stranger - Gainesville Sun - July 27, 2022](#)
- [VIDEO: Children’s Trust of Alachua County will host a special meeting and meet and greet with executive director finalists – WCJB – July 26, 2022](#)
- [Children's Trust of Alachua County holds interviews - Gainesville Sun - July 25, 2022](#)
- [Children's Trust narrows down its executive director search to 2 candidates – Gainesville Sun – July 24, 2022](#)
- [Where Fun Is Happening, Legacy Summer Camp – Alachua County Today – July 23, 2022](#)
- [Children’s Trust to hold Meet and Greets for Executive Director finalists - Alachua Chronicle – July 21, 2022](#)
- [VIDEO: Alachua County offers Freedom School summer program - WCBS4-TV - July 18, 2022](#)

- [Alachua County Commissioner Ken Cornell elected to the Florida Association of Counties board of directors](#)
- [Readers comment on abortion, Children's Trust funding, inflation, nuclear war and more](#)
- VIDEO: [Goodwill of North Florida - 2022 TeensWork Alachua Program - July 26, 2022](#)
- [Children's Trust narrows down its executive director search to 2 candidates - Gainesville Sun - July 24, 2022](#)
- [Where Fun Is Happening, Legacy Summer Camp – Alachua County Today – July 23, 2022](#)
- [Children’s Trust to hold Meet and Greet for Executive Director finalists - Alachua Chronicle – July 21, 2022](#)
- VIDEO: [Alachua County offers Freedom School summer program- WCBS4-TV - July 18, 2022](#)
- VIDEO: [Alachua County Commissioner Ken Cornell elected to the Florida Association of Counties board of directors - WCJB - July 17, 2022](#)
- [Readers comment on abortion, Children's Trust funding, inflation, nuclear war and more - Gainesville Sun - July 14, 2022](#)
- [100 Black Men hosts annual aviation academy - Gainesville Sun - July 14, 2022](#)
- VIDEO: [The Children's Trust of Alachua County offers circus summer camp for children - WCBS4 -July 7, 2022](#)
- VIDEO: [Family-friendly barbecue event held in East Gainesville - WCJB - July 3, 2022](#)

**BOARD MOTIONS**

Motions included in this section are incomplete as of the previous meeting

DATE	MOTION	STATUS	COMMENTS
7/11/22	Motion to have CTAC Attorney amend CRI contract to reflect board approved changes	In progress	Attorney Swain is finalizing the changes to the CRI contract
5/23/22	Motion to have staff investigate whether afterschool and summer camps address strategy 2.3 (literacy) or 2.4 (special needs)?	Completed	Summary of survey results will be provided during the programs update



## BOARD REQUESTS

DATE	REQUEST	STATUS	COMMENTS
6/27/22	Request from Board to have programs staff meet with the following programs to discuss funding needs 1. Saving Smiles 2. Child Advocacy Center 3. Weekend Hunger Backpack Program	In Progress	CTAC Program staff have initiated the process for each provider to complete a scope of services and budget and budget narrative forms. This process will also include meeting with staff to discuss performance measures, board presentations and contract negotiations
6/27/22	Discussion of the GNV4ALL initiative proposals	In progress	Early Childhood Coordinator (Mia) has scheduled a site visit at the Gainesville Empowerment Zone (GEZ) Family Learning Center. Staff is working on an early learning access initiative that would benefit GEZ families and other vulnerable families across the county
5/23/22	How do our position's salaries compare to other CSCs? How does our Admin costs compare to other CSCs?	In Progress	Ask a CSC request has been submitted to State Association

## SUCCESS STORIES

### **Freedom School**

During the month of June, the Akwaaba Freedom School (AFS) program began with 40 K-8<sup>th</sup> scholars. June themes highlighted how scholars can make a difference in themselves and in their families. The first parent meeting orientation was well attended. Freedom School hosted a site visit from the Children's Defense Fund and received a "Model Site"

designation; one of the top reviews given to new Freedom School sites across the country. School supplies and bookbags were provided to all AFS Scholars which included the following: Markers, crayons, books, pencils, and more! UF's E-learning, Technology, and Communication videography team captured launch week footage to include in our Freedom School documentary to be released soon.

### **Help Me Grow Alachua**

In June of 2022, the Help Me Grow Alachua team grew. A program supervisor, Kelsey Anhalt, started on June 1st. Additionally, the hiring process began for the Care Coordinator - a candidate was selected and sent to CHS talent for hiring. The Help Me Grow Alachua team has completed the following trainings: "HMG101", "HMG Outreach Materials", four different STAR (our database system) training, and CHS onboarding training.

HMG Alachua has made continued efforts to secure the 211 line through United Way of North Central Florida. Multiple outreach interactions have taken place to introduce the program to agencies in the Alachua County area.

**File Attachments for Item:**

11. CTAC Program Updates



**Item:**

CTAC Program Updates

**Requested Action:**

The Board is asked to receive the information

**Background:**

Programs staff is actively preparing for the conclusion of FY22 and preparing for the start of FY23. These tasks will include afterschool extensions and renewals, summer camp contract closeout & board presentation, end of the year provider report analysis, contract renewals, and implementation of the opioid interlocal agreement.

CTAC staff will provide a presentation of final provider numbers for FY22 and preliminary provider numbers for FY23

**Attachments:**

N/A

**Programmatic Impact:**

N/A

**Fiscal Impact:**

N/A

**Recommendation:**

Receive the information

**File Attachments for Item:**

12. Listening Project ITN 2022-05 (Committee Chair, Cheryl Twombly & Kristy Goldwire)



**Item:**

Listening Project ITN 2022-05 (Committee Chair, Cheryl Twombly & Kristy Goldwire)

**Requested Action:**

The Trust is asked to receive the information

**Background:**

CTAC held a public evaluation of applications on Thursday, July 28, 2022, at 1pm. During that time the Review team reviewed and discussed the ITN submission and applied final scores.

Agency	Score
Prismatic Services	87.13
CRL Media Advertising & Public Relations	85.65
Frankel Agency	85.47
Valentine Consulting	79.26

For next steps, the review team decided to move forward with sending additional questions to the top three vendors. The top three will receive a set of questions and will be given 3 days to respond. A 2<sup>nd</sup> public evaluation of applications has been scheduled for Monday, August 8, 2022, at 9am. The review team will meet to discuss responses to questions and make a final funding recommendation. The final funding recommendation will be presented to the full board at the August 8, 2022, 4pm meeting.

An award memo with the recommended board action will be presented at the Board meeting.

**Attachments:**

- Prismatic Services ITN Submission
- Frankel Agency ITN Submission
- CRL Media Advertising & Public Relations ITN Submission
- Valentine Consulting ITN Submission
- Listening Project Scoring Sheet and Documentation

**Programmatic Impact:**

N/A

**Fiscal Impact:**

\$100,000

**Recommendation:**

Receive the information

Organization Name	Final Score
<b>CRL Media Advertising &amp; Public Relations</b>	85.65
<b>Frankel Agency</b>	85.47
<b>Prismatic Services</b>	87.13
<b>Valentine Consulting</b>	79.26



Organization	CRL Media Advertising & Public Relations							Average	Weighted Average
	Criteria	Weight	Reviewer's Rating and Total Numerical Rating						
			Cheryl	Patricia	Bonnie	Dan	Candice		
<b>Record of Past Experience</b>									
Based on the contractor's organizational history and background and demonstrated experience and success with similar projects	15	75	80	70	87	87	79.80	11.97	
Based on feedback from references	10	90	100	80	90	100	92.00	9.2	
<b>Total Record of Past Experience</b>	<b>25</b>							<b>21.17</b>	
<b>Project Plan</b>									
Based on the contractor's detailed plan, staffing, and timeline to accomplish the tasks in the scope of work	50	80	82	80	94	89	85.00	42.50	
<b>Total Project Plan</b>	<b>50</b>							<b>42.50</b>	
<b>Subcontracting</b>									
Based on subcontractor qualifications, experience, and role in the project	5	80	80	100	92	98	90.00	4.50	
<b>Total Subcontracting</b>	<b>5</b>							<b>4.50</b>	
<b>Price</b>									
Detailed Budget that is complete and appropriate	20	92	85	70	95	95	87.40	17.48	
<b>Total Price</b>	<b>20</b>							<b>17.48</b>	
<b>Total</b>	<b>100</b>							<b>85.65</b>	

Organization	Frankel Agency							Average	Weighted Average
	Criteria	Weight	Reviewer's Rating and Total Numerical Rating						
			Cheryl	Patricia	Bonnie	Dan	Candice		
<b>Record of Past Experience</b>									
Based on the contractor's organizational history and background and demonstrated experience and success with similar projects	15	85	80	70	94	80	81.80	12.27	
Based on feedback from references	10	100	100	95	100	100	99.00	9.9	
<b>Total Record of Past Experience</b>	<b>25</b>							<b>22.17</b>	
<b>Project Plan</b>									
Based on the contractor's detailed plan, staffing, and timeline to accomplish the tasks in the scope of work	50	90	82	80	96	75	84.60	42.30	
<b>Total Project Plan</b>	<b>50</b>							<b>42.30</b>	
<b>Subcontracting</b>									
Based on subcontractor qualifications, experience, and role in the project	5	100	80	95	100	89	92.80	4.64	
<b>Total Subcontracting</b>	<b>5</b>							<b>4.64</b>	
<b>Price</b>									
Detailed Budget that is complete and appropriate	20	85	85	65	95	79	81.80	16.36	
<b>Total Price</b>	<b>20</b>							<b>16.36</b>	
<b>Total</b>	<b>100</b>							<b>85.47</b>	

Organization	Prismatic Services								
	Criteria	Weight	Reviewer's Rating and Total Numerical Rating					Average	Weighted Average
			Cheryl	Patricia	Bonnie	Dan	Candice		
<b>Record of Past Experience</b>									
Based on the contractor's organizational history and background and demonstrated experience and success with similar projects	15	98	87	100	80	90	91.00	13.65	
Based on feedback from references	10	100	100	100	100	100	100.00	10	
<b>Total Record of Past Experience</b>	<b>25</b>							<b>23.65</b>	
<b>Project Plan</b>									
Based on the contractor's detailed plan, staffing, and timeline to accomplish the tasks in the scope of work	50	95	90	80	84	85	86.80	43.40	
<b>Total Project Plan</b>	<b>50</b>							<b>43.40</b>	
<b>Subcontracting</b>									
Based on subcontractor qualifications, experience, and role in the project	5	100	80	80	87	89	87.20	4.36	
<b>Total Subcontracting</b>	<b>5</b>							<b>4.36</b>	
<b>Price</b>									
Detailed Budget that is complete and appropriate	20	88	85	60	80	80	78.60	15.72	
<b>Total Price</b>	<b>20</b>							<b>15.72</b>	
<b>Total</b>	<b>100</b>							<b>87.13</b>	

Organization	Valentine Consulting								
	Criteria	Weight	Reviewer's Rating and Total Numerical Rating					Average	Weighted Average
			Cheryl	Patricia	Bonnie	Dan	Candice		
<b>Record of Past Experience</b>									
Based on the contractor's organizational history and background and demonstrated experience and success with similar projects	15	90	80	75	87	70	80.40	12.06	
Based on feedback from references	10	60	70	60	60	60	62.00	6.2	
<b>Total Record of Past Experience</b>	<b>25</b>							<b>18.26</b>	
<b>Project Plan</b>									
Based on the contractor's detailed plan, staffing, and timeline to accomplish the tasks in the scope of work	50	80	86	80	80	79	81.00	40.50	
<b>Total Project Plan</b>	<b>50</b>							<b>40.50</b>	
<b>Subcontracting</b>									
Based on subcontractor qualifications, experience, and role in the project	5	70	70	60	80	70	70.00	3.50	
<b>Total Subcontracting</b>	<b>5</b>							<b>3.50</b>	
<b>Price</b>									
Detailed Budget that is complete and appropriate	20	85	85	90	90	75	85.00	17.00	
<b>Total Price</b>	<b>20</b>							<b>17.00</b>	
<b>Total</b>	<b>100</b>							<b>79.26</b>	



601 South Kings Drive, Suite F434  
Charlotte, NC 28204  
(704) 438-9929  
PrismaticServices.com

To: Children's Trust Item 12.  
Alachua County

***Listening Project***  
*ITN #2022-05*  
*Due: July 15, 2022 at 3:00 pm*

## Table of Contents

### Cover Letter

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### Appendix A – Resumes

### Appendix B - Forms

July 14, 2022

Children's Trust of Alachua County (CTAC)  
802 NW 5<sup>th</sup> Avenue, Suite 100  
Gainesville, FL 32601



Dear Sir/Madam,

On behalf of Prismatic Services, Inc., I am pleased to submit our response to your ITN for a CTAC Listening Project. We have prepared a comprehensive proposal to complete the work and believe we can offer CTAC the best combination of experience, effectiveness, and efficiency.

Prismatic proposes to provide CTAC with a rigorous, structured process of stakeholder engagement that includes: initial and follow-up multilingual surveys of parents, teenagers, and providers; multilingual focus groups with families; and, surveys and interviews of partners and key informants. Input will be sought from all corners of the county, using carefully selected questions to elicit thoughtful responses, but also leaving space and time for stakeholders to point the study into new areas of exploration. Prismatic will compile, analyze, and synthesize the resulting body of input into actionable recommendations that will assist CTAC in bridging gaps, meeting needs, and maximizing impact.

We believe you will not find another firm that works as hard as we do to help our clients and their programs be successful. Key differences between us and our likely competitors for this project include:

- ▶ **We have extensive experience consulting in Florida**, including: the school districts of Osceola, Hillsborough, Polk, and Miami-Dade; North Florida College; and, the Orange County ELC. We are headquartered in North Carolina but also have employees based in Florida.
- ▶ **Our team has a proven track record of distinctive success.** As a firm, we have been in business since 2007. As individuals, we have had extensive careers for decades prior to joining Prismatic.
- ▶ We are truly **external and independent**. We also do not currently have any relationships with CTAC or in Alachua County that might cause us to be in a position of evaluating our own previous efforts.
- ▶ We are not housed within a university or large consulting firm, which means **more attention**. Time and again, clients tell us, after working with only mildly interested professors or having their work pieced out to graduate students, that we provide a higher level of attention and service than universities provide. Former clients of large consulting firms, where their projects were just a tiny fraction of the workload, say the same thing. Prismatic is proudly a small consulting firm, because that allows us to provide clients with the level of service they deserve.

Prismatic have never had a contract terminated for default. If you have any questions, please do not hesitate to reach out. Thank you for your consideration of Prismatic.

Sincerely,

Tatia Prieto, Ed.D., MBA, PMP  
President

# Record of Past Experience





## Record of Past Experience

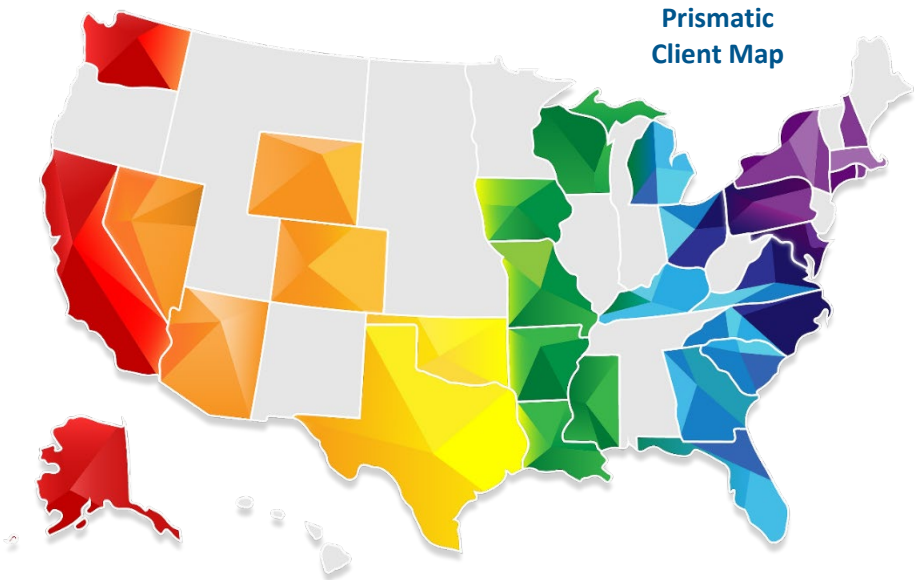
### Prismatic’s Background

Company Ownership	S-Corporation, Founded 2014
W-2 Employees	11, located in: North Carolina, Georgia, Florida, and Washington DC
1099 Contractor Consultants	50+, located nationally
FEIN	26-4031414



Since its founding in 2007, Prismatic’s focus has been on serving children, typically within the preK-12 education market. Unlike other firms, we do not consult in any other sectors. This has given us an extraordinary depth of understanding of the challenges that agencies face when seeking to improve the lives of children. We have been the external evaluator of the Homeless student assistance program of Hillsborough County Schools (FL) since 2016. We worked in Osceola County on that county’s 5-year Wraparound program to provide mental health supports to children. **To date, we have completed more than 200 projects for clients in 38 states and the District of Columbia.** We are proud that most of our clients are repeat customers and return to us to assist with new problems after providing workable recommendations to solve their initial challenges.

Our mission is to support **positive change** in child-serving organizations by **providing information, insight, and actionable items** through research, data collection, and advanced data analyses. We work with all sizes of government agencies and are confident we can meet the needs of CTAC. In all our efforts, we remember the most important customers – children.



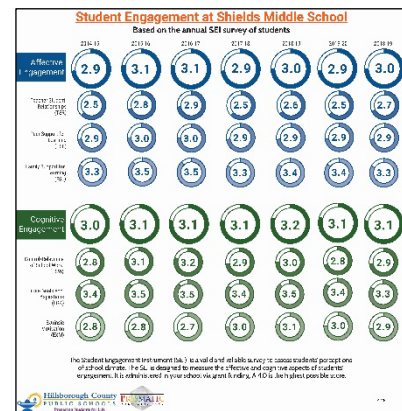
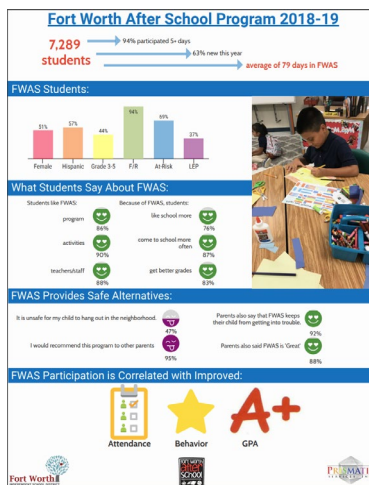
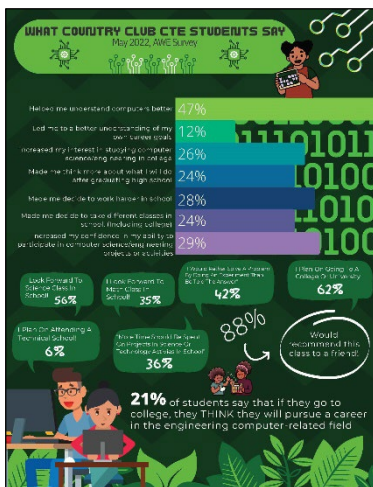
**Prismatic provides services exclusively to governmental agencies that serve children**, typically school districts and educational agencies, focusing on the operational and support programs that make them successful. Our primary categories of consulting are:

- Comprehensive Management, Performance, and Efficiency Reviews
- Operational and Equity Audits
- Strategic Planning
- Federal Grant Evaluations
- Performance Audits (to Yellow Book standards)
- Process improvement studies
- Organizational Assessments
- Survey Research and Community Forums
- Central Office Reorganizations
- Operational Reviews (human resources, food services, transportation, facilities)

What ties all of these consulting areas together? **Listening to stakeholders. Listening to stakeholders is the beginning and the end of every project we undertake.**

Examples of how we listen to agency stakeholders include:

- **Surveys** – We use stakeholder surveying on almost every project we undertake. We have both designed surveys to elicit stakeholder input and identified valid and reliable existing survey tools in the research literature that are suitable for the project at hand. We now typically administer surveys via an online, confidential application, but have in the recent past complemented online surveys with hardcopy options for harder-to-reach stakeholder groups. We have thus far fielded surveys in English, Spanish, Haitian-Creole, Chinese, Russian, Marshallese, and Korean. In addition to the typical descriptive statistical analyses, we have worked with clients to publish infographics to communicate the most critical results of the survey work. For a number of clients, we have completed longitudinal analyses of annual surveys. For example, for one project in Hillsborough County Public Schools, we conducted annual surveys of students in 80 schools to measure improvements in student engagement.



- **Focus Groups** – We often employ focus groups as a data collection technique. For focus groups, we typically use a semi-structured format to allow a free flow of ideas and an open atmosphere

of conversation. This process better reveals novel points of interest and provides a forum for stakeholders to voice their concerns and questions. We have conducted focus groups with elementary, middle, and high school student groups, staff implementers of various programs, parents, school social workers, school principals, local business leaders, community agency heads, etc.

- **Interviews** – As with focus groups, we typically use a semi-structured format. Our team members have experience in conducting interviews with a wide range of stakeholders. In Osceola County, we fielded a bi-lingual team to gather highly personal information from the parents of children with mental health challenges every six months. In several other Florida school districts, we conduct mid-year and end-of-year onsite interviews with the leaders and implementers of a variety of educational and student support programs.

As dictated by the needs of the project, we have engaged in classic focus group/interview analyses, including recording, transcription, thematic coding, and contextual grounding.

- **Data Parties** – We do not consider data analysis complete until we have collaboratively reviewed it with the client. These discussions often lead to deeper insights and more complete analysis.

We often use all of these elements in an individual project. For example, in our work with San Francisco Unified School District, the Prismatic team visited 44 schools, completed 75 interviews, completed 9 focus groups, and collected multi-lingual survey data from over 3,000 stakeholders. We then worked with the client to collaboratively analyze the data and develop a report, presentation, and infographics that communicated the findings and recommendations.

At Prismatic, we work hard to develop reports that stakeholders will not have to work hard to understand. We do not believe in sacrificing rigor of analysis, but we also do not believe that the best product of a project is a long, jargon-filled report. Instead, **we believe that the best product is an easily understood, succinct, graphic-heavy report that is actually read by stakeholders and used by leaders to drive decisions.**

### References

All projects have been completed on-time and within budget. Our clients can all attest to our ability to manage consulting engagements and fully satisfy client expectations. Please feel free to contact us if you would like additional references. Letters of recommendation follow.

Project	Contact Person
Multiple US DOE Grant Evaluations, including School Climate Transformation Grant, Project PREVENT Grant, YMHFA Grant, Learning for Life Grant. Annual evaluation and implementation assistance projects for Homeless and English Language Learner programs. Continuous client since 2014	Samantha Hooper Coordinator, Assessment and Accountability <b>Hillsborough County Public Schools</b> 901 East Kennedy Blvd, Tampa, FL 33602 813-272-4350 Samantha.Hooper@hcps.net

Project	Contact Person
<p>Evaluation of the Fort Worth After School Program, which has 79 sites. Annual work includes stakeholder surveys, focus groups, interviews, and program observations. Continuous client since 2016.</p>	<p>Miguel Garcia            Director, FWAS  <b>Fort Worth Independent School District</b>            100 N. University, Fort Worth, TX 76107            817-815-2953            Miguel.Garcia24@fwisd.org</p>
<p>Evaluation of the System of Care “Wraparound” Initiative in Osceola County, funded by SAMHSA. The evaluation included mixed methods, formative/summative work. Prismatic hired a team of local, bilingual interviewers to multiple sets of data from participating families. Prismatic created several data collection tools, including semi-annual fidelity of implementation stakeholder surveys and return on investment (ROI) framework. Client 2018-21.</p>	<p>Elizabeth Lane            Coordinator of Student Services (retired)  <b>School District of Osceola County</b>            1200 Vermont Ave, St. Cloud, FL 34769            813-298-3160 (personal cell)</p>
<p>Evaluation of the district’s 3-year Perkins modernization and innovation grant, funded by US DOE. Work included development and fielding of student surveys. Client since 2018. Prismatic has also worked on two other projects for the district.</p>	<p>Dr. Lupe Diaz            Executive Director, CTE  <b>Miami-Dade County Public Schools</b>            10151 N. W. 19th Ave, Miami, FL 33147            305-693-3030            lupediaz@dadeschools.net</p>
<p>Evaluation of the district’s K-2 Nonviolent Suspension ban. Project included gathering stakeholder input via surveys and interviews, and review of multiple years of student discipline data. Report included 5 actionable recommendations to reduce suspension disproportionality and improve outcomes for elementary children. Prismatic also completed projects for Dr. Dwyer while he was with Pinellas and Hillsborough school districts in Florida.</p>	<p>Dr. Ted Dwyer            Chief Accountability Officer  <b>Pittsburgh Public Schools</b>            341 S. Bellefield Ave, Pittsburgh, PA 15213            412-529-3335            TDwyer1@pghschools.org</p>
<p>School Performance Review for Mid-Del Public Schools, which included surveys, focus groups, and interviews with for students, staff, and parents. Completed performance gap analysis and made 71 actionable recommendations for improvements in operations and stakeholder accountability.</p>	<p>Dr. Rick Cobb            Superintendent  <b>Mid-Del Public Schools</b>            7217 SE 15<sup>th</sup> St, Midwest City, OK 73110            405-737-4461, Ext. 1233            rcobb@mid-del.net</p>
<p>Evaluation of a Truancy Magistrate Program designed to keep students in school and out of the juvenile justice system. Completed program observations; administered stakeholder surveys. Client 2014-19.</p>	<p>Michelle Ardabilly            Chief Deputy Court Administrator  <b>Sixth Judicial Circuit</b>            Pasco and Pinellas Counties            14250 49th St N, Clearwater, FL 33762            727-453-7035            mardabilly@jud6.org</p>

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Deputy Superintendent, Operations  
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Harrison Peters  
General Manager  
Office of Strategy Management  
Joe Cochran

February 18, 2020

To Whom It May Concern:

On behalf of the Office of Strategy Management, I am writing to provide my highest recommendation of Prismatic Services.

We have worked with Prismatic on many large grant evaluation projects over the past several years. Their services and performance have proven to be highly professional, accurate, flexible, and responsive. We have come to expect only excellence in their products and other deliverables.

Several of the grant projects under their scope of evaluation services are large federal and state projects demanding coordination and sensitivity to many internal and external stakeholders' agendas and concerns. Their professionalism and efficiency is furthered by open communication, clarity of purpose and their constancy of energetic, ongoing engagement in the project process and flow. They continuously provide services beyond what is expected, in a timely manner with excellence.

Prismatic's ability and willingness to adjust their work in compliance with federal and state project officer guidance adjustments and project regulation changes continue to be a great asset to us. Currently, we have Prismatic as our designated contractor for multiple external district grant evaluation projects.

I highly recommend Prismatic Services for their quality and professionalism.

Sincerely,

Julie McLeod, Manager  
Strategic Data and Evaluation  
Office of Strategy Management

Raymond O. Shelton School Administrative Center • 901 East Kennedy Boulevard • Tampa, Florida 33602  
School District Main Office: 813-272-4000 • P.O. Box 3408 • Tampa, Florida 33601 • website: [www.sdhc.k12.fl.us](http://www.sdhc.k12.fl.us)  
Office of Strategy Management



## The School District of Osceola County, Florida

### Student Services

1200 Vermont Avenue • St. Cloud • Florida 34769-3674  
Phone: 407-870-4897 • Fax: 407-870-4629 • [www.osceolaschools.net/departments/student\\_services](http://www.osceolaschools.net/departments/student_services)

March 3, 2022

Re: Prismatic Services  
20460 Chartwell Center Drive, Suite 1  
Cornelius, NC 34744-4492

To Whom It May Concern:

It is my pleasure to write a letter of recommendation for Prismatic Services Inc. In 2017 The School District of Osceola County was awarded a federal grant from Substance Abuse and Mental Health Services (SAMHSA) to provide wrap around services for families in our community. In the beginning we contracted with a local university, but it soon became evident our goals were not the same. For our second year, we contracted with Prismatic Services and continued with them through December 29, 2021 when our final report was due.

As a pre-K – 12 public school system, it is essential that our evaluators understand the requirements of the grant, how to post information on the governmental databases and what processes are required in the writing of reports. Tatia Prieto and her staff proved beyond capable for the responsibilities and requirements. They began the job immediately, setting up evaluators for our parents, acquiring NOMS information, providing much needed guidance and bringing a structure to the data we were assimilating. Ms. Prieto and her staff were available for monthly calls with SAMHSA, provided findings in person to our community stakeholders and consulted with regards to requirements, results and reactions. Although Ms. Prieto's home office is out of state, she was available in person when needed and scheduled regular meetings just to check in. Data was posted on government websites in a timely fashion and reports were turned in when due without reminders.

Prismatic Services is an excellent resource as an evaluation company. I have no reservations in recommending them and would not hesitate to hire them again should I have need of their services. Please feel free to contact me if you have any questions.

Regards,

Elizabeth Lane  
Coordinator  
[Elizabeth.Lane@osceolaschools.net](mailto:Elizabeth.Lane@osceolaschools.net)

Director  
Daryla R. Bungo

Coordinator  
Elizabeth Lane

SCHOOL BOARD  
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Shannon Scott

Supervisor of Social  
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Antonia "Toni" Rapinesi

Supervisor of Psychological  
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Angela "Angie" Burdue

Student Achievement – Our Number One Priority  
Districtwide Accreditation by the AdvanceED Accreditation Commission  
School District Main Office: 817 Bill Beck Boulevard • Kissimmee • Florida • 34744-4492 • Phone: 407-870-4600 • [www.osceolaschools.net](http://www.osceolaschools.net)  
An Equal Opportunity Agency



Neither Prismatic nor any prospective subcontractors has contracted with the CTAC during the past 24 months. Neither Prismatic nor any prospective subcontractors has a staff member who was an employee of the CTAC during the past 24 months, or is currently a CTAC employee.

Prismatic has never had a contract terminated for default.

# Project Plan



## Project Plan

Listening can be hard. It’s not the same as merely hearing. It’s deeper than writing down and summarizing what was said. For this project, “listening” will require **understanding** what was said as well as what wasn’t said, contextualizing both, then organizing all the input of stakeholders into actionable recommendations to CTAC.

As noted in the ITN, the results of this project will be used “to identify and characterize ways to support all of Alachua County’s children and to determine how CTAC resources can be invested wisely to achieve collective community impact.” The ITN outlined CTAC’s four planned uses for this project, as well as three goals/objectives:

- *Ensure that CTAC’s various stakeholders have meaningful input into CTAC’s strategic planning.*
- *Reveal findings that will allow the CTAC to develop priorities and strategies to address the identified needs and gaps while utilizing and mobilizing existing community strengths and resources.*
- *Maximize the impact of CTAC resources in addressing the needs of Alachua County children.*

Prismatic is both ready and qualified to help CTAC **truly listen** on this project.

## Work Plan

In reviewing the ITN, it is apparent that CTAC has a strong sense of how this project should be implemented and paced. Rather than try to shoehorn this work into some template as many other firms do, Prismatic proposes to meet you where you are and complete the project in the manner you wish, complemented by our vast expertise in making projects successful and useful.

With that in mind, Prismatic’s project approach includes seven tasks, each with built-in flexibility to meet your specific needs. In that plan, we include as our first step in working with you a full review of our project approach and modification, if necessary, to meet project needs.





## TASK 1

### Initiate Project



We will begin this project with an onsite visit with CTAC leadership and staff for the purpose of discussing and finalizing our proposed team, work approach, and timeline, as well as handling contractual details. During the project initiation teleconference, we will discuss:

- overall correspondence between Prismatic’s proposed approach and goals of CTAC;
- initial perceptions of current CTAC service gaps, county population, and capacity of service providers;
- methods of data transfer;
- project meeting dates and schedule;
- draft data collection list;
- draft stakeholder survey instruments; and
- other areas desired by CTAC.

Prismatic knows that projects are made better through regular, sustained communications with the client. We typically propose to schedule at least **monthly “check-in” calls** via Zoom/videoconference or phone. We typically set these for the same day of week and time for the life of the project to help establish a systematic communication flow. These check-ins would have a set agenda so they can be completed efficiently. This agenda is usually:

- discussion of activities completed in the previous month
- review of challenges or changes in project progress since the last call
- review of activities scheduled to occur in the upcoming month
- review of upcoming project products and their deadlines

The monthly check-ins would be attended by the Prismatic project manager, at least one project support staff member, and one or more project consultants as needed based on the current activities and deliverables. Of course, Prismatic consultants are always available via email throughout the month between check-ins. Prismatic’s project manager will be regularly accessible via phone six days a week.

Our goal in this task is to get the project off to a fast and productive start.

Key Outcomes of Task 1:

- Contractual Arrangements
- Revised Work Approach, as necessary
- Revised Project Timeline, as necessary
- Review of Draft Stakeholder Survey Instruments

## TASK 2

### Field Stakeholder Surveys



The ITN requires the development, fielding, and analysis of surveys. We use surveys in almost every project we undertake, as they often provide a wealth of opinion and information not available through any other method. For this project, we propose both the typical, initial survey to collect a wide variety of opinions but then also a **follow-up survey to a targeted selection of first-survey respondents**, in order to fully explore emerging themes. Prismatic's process for developing and administering surveys includes seven subtasks.

	Survey Task	Activities
1	Survey Items Approval	<ul style="list-style-type: none"> <li>➤ Coordinate with client to review and cull a large bank of survey items into a survey that achieves client objectives. CTAC already included in the ITN a starting point for many survey items. We propose to build on that, the survey instruments used by CTAC in its other recent stakeholder input projects (such as <i>Ensuring Summer Thrive</i>) to develop a variety of input instruments.</li> </ul>
2	Translation of Survey	<ul style="list-style-type: none"> <li>➤ Translate survey into various languages. Based on Census data, we believe that a Spanish language translation for parent/caregiver and teenager instruments would be useful on this project. We could also accommodate additional survey translations, in needed.</li> </ul>
3	Launch of Survey	<ul style="list-style-type: none"> <li>➤ This process will vary, depending on the survey audience. For CTAC partners and providers, the survey would be launched by direct email contact, with a link to the secure survey site. For parents/caregivers, the survey would be launched via news release, sharing the survey link with program providers, posting it on the CTAC website, direct email/text to current CTAC program participants, etc.</li> <li>➤ Develop distribution methods in addition to online, if needed</li> <li>➤ Going live and receiving responses</li> <li>➤ Troubleshooting</li> </ul>
4	Monitoring Response	<ul style="list-style-type: none"> <li>➤ Emailing reminders</li> <li>➤ Follow-up emails for non-responders</li> </ul>
5	Close Survey	<ul style="list-style-type: none"> <li>➤ Review response rates along various dimensions to determine whether sufficient responses have been received. If not, conduct additional outreach efforts.</li> </ul>
6	Aggregate Survey Results	<ul style="list-style-type: none"> <li>➤ Outreach results</li> <li>➤ Response rates</li> <li>➤ Closed-ended responses</li> <li>➤ Demographic data</li> <li>➤ Develop aggregate draft analyses.</li> <li>➤ Hold data party with client to discuss initial analyses.</li> </ul>
7	Summarize Findings	<ul style="list-style-type: none"> <li>➤ Write narrative report, then discuss with client.</li> <li>➤ Prepare PowerPoint and other presentation materials.</li> <li>➤ Provide survey results in Excel to client.</li> <li>➤ Present result to the public.</li> </ul>

Key Outcomes of Task 2:

- Survey instruments
- Launch plan
- Survey monitoring
- Stakeholder Survey Results

**TASK 3**  
**Conduct Onsite Work**

The onsite work of the team is the heart of the entire listening process. Done well, the team will leave with a deep understanding of the challenges and successes CTAC faces, as well as solid ideas for driving future strategies.



**We know this project will require substantial boots on-the-ground work.** As noted in Chapter 1 of this proposal, Prismatic will complete data collection via surveys, focus groups/community meetings, and interviews.

Data Collection Method	Stakeholder Group					
	CTAC Staff	CTAC Partners	Provider Agencies	Key Informants	Parents & Caregivers	Teenagers
Survey		X	X	X	X	X
Focus Group/Community Meeting		X	X	X	X	X
Targeted Interview	X	X		X	X	X

Selection of participants for stakeholder input will done along multiple dimensions:

- Ages: Parents to provide input for Birth-5 and elementary-aged children, while teenagers will be asked to provide input for middle/high school-aged children;
- CTAC involvement: Prismatic will begin with those currently accessing CTAC programs, then reach out to those not currently accessing them, typically by contacting those who inquired about programs but ultimately did not enroll or remain enrolled;
- Geography: Prismatic will endeavor to obtain substantive input from a cross-section of county municipalities and regions (Alachua, Archer, Gainesville, Hawthorne, High Springs, La Crosse, Micanopy, Newberry, and Waldo), weighted by population;
- Vulnerable populations – immigrants, victims of domestic violence, housing insecure, juvenile justice involvement, pregnant women/new mothers, special needs
- At risk/at promise communities – those who have historically not had a voice or have not trusted institutions
- Past Input Providers: It is almost always useful to seek ongoing input from stakeholders.

As all of Prismatic’s work is focused on improving outcomes for children, we are well-versed in maintain data privacy. We routinely comply with FERPA as well as federal grant data privacy/management requirements.

To ensure the widest possible listening work, we propose an iterative process here, leaving open the possibility for additional focus groups with various stakeholders as the project progresses. This will allow for deeper exploration as insights are developed as well as provide for any necessary course corrections.

Key Outcomes of Task 3:

- Customized Interview and Focus Group Guides
- Selection of/invitation of cross-section of representatives from larger stakeholder groups
- Completion of Onsite Listening Activities

**TASK 4**  
**Develop Preliminary Issues**

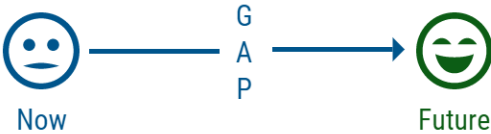


In this task we will work closely with CTAC leadership to review emerging themes. We will draw together the initial results of the surveys, focus groups and interviews. We emphasize that these are initial results. We believe in a truly collaborative approach with clients. That means that all of our initial conclusions and recommendations will be discussed with you thoroughly prior to development of reports and infographics



We will develop a SWOT analysis, identifying the Strengths, Weaknesses, Opportunities, and Threats of the work of CTAC and its partners in serving all Alachua County children. It is important to emphasize the organization’s current status in this task; sometimes, yesterday’s programmatic strengths have attenuated into weaknesses or become a weakness due to a change in the operational environment. It is also important to approach this task with sensitivity – we recognize that no organization is perfect, but that it can also be difficult for an organization to acknowledge its weaknesses.

We will then undertake an analysis of the gaps between the current state and the future state to determine what needs to be done to move toward an improved future state. To accompany this analysis, we will identify risks associated with each potential future state. With any change, there is risk. Even well-laid plans and solid execution do not guarantee future success. However, a careful assessment of risks associated with each future state scenario should point to key factors for success as well as identify areas in which leaders should attempt to mitigate known risks.



Key Outcome of Task 4:

- List of Preliminary Issues by Area

➤ SWOT and Gap Analyses

### TASK 5

#### Develop Multiple Drafts

This task comprises an iterative process between the Prismatic project manager and CTAC project sponsor. We have no interest in developing a heavily footnoted, esoteric, academic report that will immediately begin to gather dust on the client's shelves. We do want to provide clients with understandable and actionable reports and infographics that help drive organizational improvement.



We anticipate that the main report will include collective county-level results, as well as extensive geographic and key stakeholder groups breakdowns. All Prismatic reports are heavy on data graphics, as we find this method is typically most accessible to most audiences.

Once a draft product is submitted, Prismatic expects that the project manager and project sponsor will discuss it. As needed, changes to content, format, and tone will be made, until the product meets all client expectations.

Key Outcomes of Task 5:

- First Draft Product
- Additional drafts, as needed

### TASK 6

#### Develop Final Report

We understand that final products become seen as CTAC products. As such, they should adhere to standards of quality and consistency established by CTAC. We are committed to following those standards.



In the final main report, we will:

- *Identify and focus CTAC efforts on priority issues impacting all children birth to 18 in Alachua County.*
- *Make recommendations for an overarching framework and key strategies to address priority issues.*
- *Make recommendations for a strategic plan for the use of CTAC funds.*

As desired, we will prepare and provide targeted presentations to stakeholder groups. In these, we will highlight the major findings, commendations, and recommendations of the final report. Our presenter will be prepared to answer questions in detail and to discuss possible avenues for recommendation implementation

Key Outcomes of Task 6:

- Final Report and Products

➤ Project Presentation(s)

**TASK 7**

**Submit Work Papers**

Prismatic understands that once the final products have been completed and presentation(s) made, CTAC will begin implementing Listening Project recommendations. To that end, CTAC must have a well-organized set of work papers of which to refer in the future. We will ensure proper documentation and records for all information collected (i.e., transcripts, materials used to conduct listening sessions, surveys, video recordings, etc.) are retained and submitted to CTAC. We have the capability to submit the work papers to the cloud server venue of CTAC’s choosing, including iCloud, ShareFile, FTP, Dropbox, Onebox, etc.



Key Outcome of Task 7:

- Organized electronic work papers

**Project Management Capabilities**

**Management can make or break a project.** One survey found that more than two-thirds of US Federal government managers said that only one in five of their projects finish within budget and on time.<sup>1</sup>



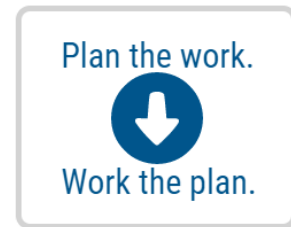
Only 1 in 5 projects finish on time and on budget

Often projects fail to meet all their objectives, suffer from scope creep, or exceed their budgets. Those projects that do succeed share some common characteristics, including effective project management.

Effective project management requires efficient use of knowledge, skills, tools, and techniques to accomplish

objectives. Prismatic’s team is well-versed and seasoned in project management, bringing to the table experience in successfully managing a wide variety of consulting projects.

Our Project Manager for this engagement is a Project Management Professional, certified through PMI. We understand and utilize the project management processes and standards supported by PMI. This includes adherence to the Code of Ethics and Professional Standards required by PMI. Prismatic is committed to doing what is right and honorable and requires responsibility, respect, fairness, and honesty (PMI’s four foundational values) of all its team members.



From the beginning of our work together, we will emphasize meeting all your requirements. In our first meeting, we would review in detail our proposed project work approach to determine its degree of fit with your expectations. If the fit is not perfect, we will adjust our work approach accordingly. Once we have planned the work to our mutual satisfaction, we will rigorously work the plan.

<sup>1</sup> PM Network magazine, March 2008.

## Proposed Prismatic Team

Key differences in the way Prismatic builds a project team include:

- **We build a team specific to your project.** This project will require extensive on-the-ground work. For that reason, we don't plan to staff it with our analyst based in Washington, DC. Instead, we plan to manage it from our headquarters in North Carolina, then staff it with a combination of consultants based in North Carolina, analysts based in Florida, and local subcontractors in the area. On our recently completed multi-year project in Osceola County, we developed a team of multilingual family interviewers. We plan to deploy several of those interviewers again for this project.
- **We do not bait and switch.** We do not advertise using senior, experienced professionals and then have someone else do the work. The team members we propose are the people you will actually work with, face-to-face.
- **We are flexible.** If, during our project initiation task, our work approach review indicates we need more expertise in a particular area than we originally proposed, we will add to or adjust our team. We do not believe the team is decided upon until after we (Prismatic and the client) completely agree on the scope of work.

Resumes for our initial proposed leadership team for this project are provided in the appendix. The team includes:

- **Tatia Prieto**, Ed.D, MBA, PMP – Prismatic's president, Dr. Prieto has directed nearly every one of Prismatic's projects, including all of the firm's Florida projects.
- **Stacy Williams**, Ed.D, MA – A former school district administrator, principal, and teacher, Dr. Williams had spent her career focused on improving outcomes for children.
- **Jerrelle Williams**, MSW – In addition to working as a Mr. Williams was one of the primary family interviewers for the Osceola project.



# Subcontracting





## Subcontracting

Prismatic has a team of 11 staff, including 5 full-time professionals and could complete this project without subcontractors, if desired. Our staff includes members with native literacy in the English, Spanish, Turkish, and Albanian languages. A total of 1.25 FTE staff are based in Orlando; we anticipate using them to conduct some of the onsite activities. Major focus groups and interviews would be conducted by Prismatic's president, Dr. Tatia Prieto. If desired due to convenience or COVID precautions, some focus groups and interviews would be conducted remotely via Zoom by Prismatic's senior consultant, Dr. Stacy Williams. Drs. Prieto and Williams are both based in Charlotte, North Carolina.

To round out the team, Prismatic proposes to potentially use a few individual subcontractors who are based in Florida and bring local lived experience to bear. The primary local interviewer would be Mr. Jerrelle Williams, who was also part of Prismatic's multilingual interview team for the Osceola project. Mr. Williams has given his agreement to participate in this project once it is awarded to Prismatic. Given our current knowledge of the project, we anticipate that Mr. Williams would complete approximately 10% of the planned work. Others from the Osceola team included professionals with native-language capabilities in Spanish and Haitian-Creole. They too could be included on this team, if needed.

All project activities would be completed by staff/subcontractors in North Carolina or Florida.

# Pricing



## Pricing

We hope that our proposal sufficiently outlined our understanding of and qualifications to meet the needs of CTAC on this Listening Project. We also hope that our enthusiasm for this work and our devotion to improving children's outcomes were apparent.

For this evaluation, we estimate 1,025 hours of effort will be needed. This includes onsite days gathering data, holding focus groups/community events, completing interviews, and meeting with CTAC leadership/staff, as well as offsite days developing project instruments, compiling/analyzing data, and developing products.

	Hourly Rate	Hours	Total
Project Manager	\$145	175	\$25,375
Senior Consultant	\$100	250	\$25,000
Consultants/Analysts	\$75	300	\$22,500
Clerical/Technical	\$42	300	\$12,600
		1,025	\$85,475

Direct expenses are primarily for travel, based on average airfare and GSA mileage reimbursement rates, and then GSA lodging and per diem rates.

	Rate	Trips/Days	Total
Airfare for NC staff	\$600	6	\$ 3,600
Per diem for NC/FL staff	\$59	25	\$ 1,475
Loding for NC staff	\$113	25	\$ 2,825
Mileage for FL staff/subcontractors	\$0.58	1,000	\$ 580
Miscellaneous Office			\$750
		1,025	\$8,480

For the planned project hours, including both professional fees and estimated direct expenses, our total cost would be \$93,955.

Unlike many of our likely competitors for this project, Prismatic leverages technology and ongoing management to keep overhead costs low. We are not housed within a university or large consulting firm, which means lower overhead. Although they do not advertise it, many universities charge overhead of as much as 40 percent for projects like this. Other consulting firms charge overhead of as much as 50 percent. We keep our overhead below 10 percent, so you get more actual consulting work for every dollar you spend.

Prismatic understands that this would be a fixed fee contract and no additional monies beyond the initial contract would be sought in order to complete the proposed scope of work outlined in the ITN.

We welcome and encourage negotiation on our proposed pricing and are open to discussing adjustments to our proposed work to ensure that we best meet the needs of CTAC.

# Resumes

Item 12.



# Tatia Prieto

## Professional History

Prismatic Services, Inc.

President, 2007 – present

Evergreen Solutions, LLC

Vice President, 2006 – 07

Senior Manager, 2005 – 06

MGT of America, Inc.

Senior Consultant, 05

Independent Consultant, 1999-05

Consultant, 1998-99

Senior Analyst, 1997-98

Proposal Development Coordinator, 1996-97

Analyst, 1995-96

Research Associate, 1995

Continental Airlines, Inc.

Manager, 2004-05

Senior Financial Analyst, 2002-04

Senior Revenue Management Analyst, 2001-02

Intern, 2000

Cherry Communications

Technical Director, 1993-94

Monarch Constituent Services

Office Director, 1992-93

Rose Institute of State and Local Government

PC/GIS Director, 1990-92

Florida Army National Guard/U.S. Army Reserve

Captain, 1990-99

## Select Evaluator Experience

Evaluator of the **Perkins Innovation and Modernization Grant** awarded to **Miami-Dade County Public Schools (FL)** by the USDOE. The goal of the five-year grant was to implement a new CTE curriculum in partnership with LEGO and Microsoft, providing middle school students the opportunity for an expanded technology course sequence leading to industry certification. The evaluation was mixed methods and quasi-experimental in design. As part of the evaluation, developed a new CTE student engagement survey instrument.

Evaluator of the Reaching Underserved Residents with Accessible Learning (RURAL) **Institutional Resiliency Project** of **North Florida College**, which was funded through a USDOE grant. The goals of the grant were to

improve the college's capacity to provide high-quality online learning opportunities. The evaluation included formative and summative work and was mixed methods in nature. Data collected for the evaluation included: observations of online classrooms, self-efficacy pre/post surveys of online instructors, analysis of coaching/PD provided to online instructors, student course enrollments, and a student satisfaction survey.

Evaluator for multiple grants under the STOP School Violence Act of 2018 administered by **US Department of Justice** (DOJ-BJA):

- ▶ **Mental Health Awareness/Violence Prevention Program** for **Miami-Dade County Public Schools** (FL), which included a quasi-experimental component to assess impact of several mental health programs
- ▶ **Mental Health Awareness/Violence Prevention Program** for **Hillsborough County Public Schools** (FL), which included evaluation of the implementation and impact of the Second Step curriculum in all district middle schools and PreK centers
- ▶ **Threat Assessment/Violence Prevention Program** for **Hillsborough County Public Schools** (FL), which implemented the evidence-based Comprehensive School Threat Assessment Guidelines (CSTAG) system

Each STOP grant requires semi-annual reporting to the DOJ-BJA.

Evaluator of the **K-2 Violent Nonviolent Suspension Ban** for **Pittsburgh Public Schools** (PA). This mixed methods work included analysis of extant longitudinal data for K-5 students in all 34 district schools, conduct of principal interviews, and collection of teacher survey data. The evaluation results included an analysis of trends in discipline disproportionality and were used by the school board as it considered expanding the ban to grades 3-5.

Evaluator of the **Recess Initiative** of **Miami-Dade County Public Schools** (FL). This quasi-experimental mixed methods evaluation included analysis of additional recess time in 11 elementary schools, focusing on teachers and students in grades K-2. Qualitative data gathered included principal interviews, onsite observations of recess areas and their use by students, surveys of teachers, and surveys of parents. Quantitative data gathered included classroom daily schedules, student attendance, discipline, and academic data. The data for the 11 pilot schools were compared to those for 11 matched control schools.

Program evaluator for the **Promoting Health Education** grants funded by the CDC in three school districts:

- ▶ **School District of Hillsborough County (FL)**
- ▶ **Cleveland Metropolitan School District (OH)**
- ▶ **Gaston County Schools (NC)**

The goals of the five-year CDC grants are to improve sexual health education, sexual health services, and safe and supportive environments in selected priority schools and districtwide.

Program evaluator for the of **Osceola County** (FL) **System of Care** ("Wraparound") initiative, for which the local school district was the principal investigator and program manager. Begun in 2017-18 and funded through SAMHSA, the 5-year project worked to build a comprehensive system of quality enhancement initiatives to improve outcomes and support for children and on behalf of children (Prekindergarten through Grade 5), including their families and caregivers, who had been diagnosed or were diagnosable SED/co-occurring disorder including early onset and/or first episode psychosis and struggling in multiple-life domains. Prismatic was selected to replace the original evaluator after the first year. The evaluation included formative and summative elements. Prismatic interviewers completed baseline, 6-month, and end-of-services interviews with participating families; Dr. Prieto analyzed the interview results to support continuous improvement efforts, local evaluation needs, and Federal reporting requirements. Dr. Prieto also:

- worked with a large governance committee to develop data systems that supported accountability and measurement of the return on investment;
- developed and administered to governance committee members a bi-annual fidelity of implementation tool, modeled on the Wraparound Fidelity Index (WFI-EZ); and
- developed tools and data systems to assess educational gains, changes in behavior, and organizational impacts (Kirkpatrick Model Levels II-IV) from the primary professional development effort of the grant, Wraparound 101.

Program evaluator for the **Fort Worth After School** program, which is locally funded and serves more than 10,000 students at 79 sites in **Fort Worth Independent School District** (TX). Developed annual evaluations since 2016-17.

Program evaluator for multiple **21<sup>st</sup> Century Community Learning Centers (CCLC)** grants:

- **Boys & Girls Club of Tampa Bay (FL)**, which served students in four middle schools. Developed annual evaluations for 2017-18 through 2019-20 for three separate grants.
- **Edinburg Consolidated School District (TX)**, which served elementary and middle school students in 10 schools. Developed annual evaluations for 2018-19 through 2020-21.
- **Barrow County Schools (GA)**, which serves elementary students from five schools. Prismatic has developed annual evaluations since 2017-18 and is on contract to complete the remaining annual evaluations through 2022-23.
- **Fort Worth Independent School District (TX)**, which serves students in 10 schools. Prismatic is on contract to provide annual evaluation services 2021-22 through 2026-27.

The goals of 21<sup>st</sup> CCLC grants are to improve student academics, student behavior, increase grade promotion, improve student attitudes towards school and increase family participation in academic activities.

Program evaluator for **MyON®**, an online reading intervention program used by the Read on myON program in **Hillsborough County** (FL). The evaluation provided a snapshot of user demographics, student retention, and the relationship between myON use and student success in school.

Evaluator for the **Project Prevent** grant for the **School District of Hillsborough County** (FL). Project Prevent was a 5-year program that served 18,000 students in 21 schools, grades K-12. The goal of Project Prevent was to break the cycle of violence by meeting the needs of affected students. The evaluation plan included formative and summative outcomes. The evaluation model was quasi-experimental and mixed methods in design. Dr. Prieto:

- oversaw the annual administration and analysis of the Student Engagement Instrument (SEI) that is completed by a representative sample of students in each of the 42 treatment/control schools;
- developed tools and data systems to assess educational gains and changes in behavior (Kirkpatrick Model Levels II-III) from the myriad professional development offerings of the grant, including PBIS, CHAMPS, Restorative Practices, Trauma Sensitive Practices, and Second Step K-8; and
- developed annual evaluations for the US DOE.

Evaluator for the **Project AWARE** grant for the **School District of Hillsborough County**, (FL), awarded in 2014. Project AWARE was a 2-year program funded by SAMHSA to build awareness of and capacity to respond to

mental health issues among students through extensive training of school personnel and other adults who interact with students. Project AWARE trained school personnel and other adults in Youth Mental Health First Aid (YMHFA). The project trained more than 900 adults who had regular contact with ~96,000 students in the district's middle and high schools. The evaluation plan included formative and summative outcomes.

Evaluator for the **School Climate Transformation** grant for the **School District of Hillsborough County** (FL). The grant was a five-year program that served 22,000 students in 25 schools, grades K-12. Program objectives were to expand and enhance local awareness, capacity, implementation, and sustainability of the Multi-Tiered System of Support: Behavior (MTSS:B) framework, in order to improve school climate and safety. The evaluation plan included formative and summative outcomes. The evaluation model was quasi-experimental and mixed methods in design. Dr. Prieto:

- oversaw the annual administration and analysis of the Student Engagement Instrument (SEI) that was completed by a representative sample of students in each of the 50 treatment/control schools;
- developed tools and data systems to assess educational gains and changes in behavior (Kirkpatrick Model Levels II-III) from the myriad professional development offerings of the grant, including PBIS, CHAMPS, Aligning MTSS:B, Climate and Culture Essentials, and Social Express; and
- analyzed school implementation data, including PBIS BOQ and PIC data; and
- developed annual evaluations for the US DOE.

Evaluator for the **School Climate Transformation** grant for **Polk County Schools** (FL). The grant was a five-year program that served 3,700 students in six schools intensively, as well as 82,000 students in the remaining 104 schools through districtwide activities. The goal of grant activities was to enhance and expand systems of support for, and provide technical assistance to, identified schools implementing a Multi-Tiered System of Support for Behavior (MTSS:B) to improve school climate and behavioral outcomes for students. The mixed-methods evaluation plan included formative and summative outcomes. Dr. Prieto:

- analyzed student data, including elements related to mental health (threat assessments, Baker Acts, and Universal Screener) and behavior (functional behavior assessments and behavior implementation plans – Tier 3 interventions);
- analyzed school implementation data, including PBIS, BOQ, and PIC data; and
- developed annual evaluations for the US DOE.

Evaluator of the **International Baccalaureate** (IB) program at **Hickory High School** (NC). The evaluation involved qualitative assessments of stakeholder satisfaction with the IB program and its ability to help students excel. It also called for quantitative assessments of IB populations, success rates, and retention among students.

Evaluator for the **Learning for Life** grant for the **School District of Hillsborough County** (FL). Learning for Life is a program that blends character development, career education, life skills, and academic learning. Assessed formative and summative outcomes of program implemented in 26 elementary schools, serving nearly 15,000 students. Developed annual evaluations for five years.

Evaluator of the **Literacy First** program for **Hickory Public Schools** (NC). The evaluation required a mixed-methods approach to assess the impact of three years of Literacy First training and implementation in grades Kindergarten through six. In addition to multiple interviews and focus groups, we developed a rubric for assessing literacy supports in classrooms and an online survey of all elementary teachers.



Survey creator for the Community Training and Assistance Center (CTAC), which assisted **Henrico County Schools** (VA) in evaluating its **Learning Leaders Initiative**. The survey questions were designed in consultation with CTAC and administered in paper and online formats.

Evaluator of the **Elementary and Secondary School Counseling Grant** received by **Pinellas County Schools** (FL). The evaluation included formative and summative outcomes and was mixed-methods, quasi-experimental in design. The grant served students in four elementary schools (~2,000 students). Dr. Prieto:

- developed systems for and trained school counselors in data collection annually;
- analyzed various data including mental health services received by students, Olweus Bullying Prevention surveys, and Check & Connect data;
- developed annual reports for the US DOE and in the last year, completed case studies of the two best-implementing schools.

Evaluator of the **Title III, Part A: English Language Acquisition** grant for the **School District of Hillsborough County** (FL), 2009-10 through 2019-20. Assessed the progress of more than 20,000 district students in progress towards acquiring English-language proficiency; attainment of English-language proficiency; and adequate yearly progress in academic reading and mathematics by ELLs.

Evaluator of the **Title III, Part A: English Language Acquisition** grant for **Polk County Schools** (FL), 2013-14 through 2018-19. Assessed the progress of more than 10,000 district students in progress towards acquiring English-language proficiency; attainment of English-language proficiency; and adequate yearly progress in academic reading and mathematics by ELLs.

Evaluator of the **Florida Increasing Refugee Student Achievement** continuation project for the **School District of Hillsborough County** (FL). This was a summative assessment of a five-year grant designed to serve a significant refugee population, estimated to be arriving in the county at a rate of approximately 500 per year.

Evaluator for a review of the **voluntary prekindergarten program** (VPK) in Orange County, Florida for the **Early Learning Coalition**. The 342 VPK provider sites in the county served 10,261 children in 2008-09.

Evaluator for DOE-funded **Readiness in Emergency Management in Schools (REMS) Grant** projects:

- **Fort Worth Independent School District**, Texas (FY10);
- **South-Western City Schools**, Ohio (FY10);
- **Prince William County Schools**, Virginia (FY10);
- **Senatobia City School District**, Mississippi (FY10);
- **Fulton County Schools**, Georgia (FY09);
- **Carter County Schools**, Kentucky (FY09);
- **Johnson County Schools**, Kentucky (FY09);
- **Ankeny Community School District**, Iowa (FY09);
- **Ulster County BOCES**, New York (FY09); and
- **Alexandria City Public Schools**, Virginia (FY09).

Project Evaluator of a single randomized control trial (RCT) evaluation of the grant awarded by the Center for Substance Abuse Prevention to **Pinellas County Schools** (FL) for its **Binge Drinking Prevention Program**. The evaluation determined the efficacy of the program to increase knowledge and prosocial attitudes towards underage and binge drinking in high school students.

Project Evaluator for the **Character Education** grant project in **Pinellas County Schools** (FL). The Character grant served 21 schools in the district and sought to improve academic achievement and reduce suspensions. The

quasi-experimental mixed-methods evaluation design included surveying staff and students, conducting site visits to assess programmatic implementation, and maintaining an extensive student database. Prismatic was selected to replace the original evaluator after the first year. Dr. Prieto:

- developed and administered a SEL Climate survey to all staff of the 21 schools;
- prepared an annual Character Snapshot for each school that staff discussed with each principal at school start as a way of guiding activities for the upcoming year;
- sought to correlate the level of programmatic implementation with changes in academic achievement and suspension/referral rates;
- completed case study interviews with leaders of highly implementing schools; and
- provided semi-annual reports to the US DOE, as well as the overall final evaluation.

Evaluator for the state-mandated external annual reviews of multiple Even Start programs in Florida:

- **Indiantown Even Start** 2007-08 through 2010-11
- **Citrus County Even Start** 2007-08 through 2011-12
- **Pinellas County Even Start** 1997-98 through 2010-11

For each, Dr. Prieto advised on data collection and programmatic efforts to ensure compliance with state requirements. She then evaluated the program's success in meeting the 10 Florida Standards for Even Start and made recommendations for improvement.

Evaluator of the three-year **Student Alcohol Reduction (StAR) Project** in **Pinellas County Schools** (FL). StAR was developed through a US DOE Grant to Reduce Alcohol Abuse and has completed its first year. The StAR Project provided services to all Pinellas high schools, with intensive services at four, a total treatment population of approximately 36,000 students.

Evaluator of the **Peer Mediation** program in **Pinellas County Schools** (FL), which provided services in 43 schools. Dr. Prieto was asked to complete a summative evaluation of the program as a result of a US DOE request. The Pinellas Peer Mediation program had switched from its original model program to one that was locally developed; the US DOE sought a summative evaluation to assess the success of this change.

Evaluator of the two **Foreign Language Acquisition Program** (FLAP) grants **Pinellas County Schools** (FL). The first grant served K-1 students in two schools, one operating a dual language immersion model and one operating a partial immersion program. The second grant served K-5 students in four schools in either a dual language or partial immersion model. The four goals for student outcomes were: increase English proficiency, increase Spanish proficiency, achieve academic performance at or above grade level, and develop positive cross-cultural attitudes and behaviors. In addition to developing foreign language skills, FLAP expected to improve the English reading skills of students who were previously below grade level.

Evaluator for the state- and federally-mandated external review of three schools in **Pinellas County Schools** (FL) that received grants for school improvement under the **Comprehensive School Reform** program. Completed a formative and summative evaluation. Reviewed each school's grant application and implementation, student achievement data, survey data from all constituents, and available state databases. Two of the schools were in the first year of grant implementation, so the evaluation focused on developing benchmarks that can be used for the life of the grant and beyond. The third school was in the final year of the CSR grant, so the evaluation focused on documenting the depth and breadth of whole school reform implemented.

Data analyst for the [Iowa Department of Education](#) and their CDC Youth Risk Behavior and School Health Profiles Surveys in 2016 and 2018. Both surveys were administered statewide, in alternating years. Dr. Prieto analyzed the compiled datasets and worked with the client to develop infographics to highlight trends, progress, and areas in need of improvement.

### Selected Speaking Engagements

Prieto, T. (2020, February). *Keeping it real – avoiding worst practices*. Presentation at the North Carolina Association for Research in Education, Winston-Salem, NC.

Prieto, T. (2019, October). *Keeping it real – avoiding worst practices*. Presentation at the CREATE Conference, High Point University, NC.

Prieto, T. (2018, January). *Administrative spending among charter schools and traditional school districts – are there differences?* Presentation at the Hawaii International Conference on Education, Honolulu, HI.

Prieto, T. (2018, January). *How evaluation can sink a good program – learning from what doesn't work*. Presentation at the Hawaii International Conference on Education, Honolulu, HI.

Prieto, T. (2017, February). *Administrative Differences Between Charters and Traditional School Districts*. Presentation at a meeting of the North Carolina Association for Research in Education, Chapel Hill, NC.

Prieto, T. (2013, January). *How evaluation can sink a good program*. Presentation at the 2013 Southeast Evaluation Association workshop, Tallahassee, Florida.

Prieto, T. & Putnam, M., (2007, March). *Examining Long-Term Even Start Impacts and Organizing for Longitudinal Evaluation*. Presentation at the 2007 Annual National Conference on Family Literacy, Louisville, Kentucky.

Prieto, T., (2006, March). *Effective Longitudinal Evaluation of Even Start Impacts on Parents and Children*. Presentation at the 2006 Annual National Conference on Family Literacy, Louisville, Kentucky.

### Professional Affiliations and Certifications

Certification, Social and Behavioral Sciences Certification Course in Responsible Conduct of Research

Project Management Professional, certified by the Project Management Institute Member, Project Management Institute, 2007-2024

Member, American Educational Research Association, 2019-present

- ▶ Paper peer reviewer in Division A, School Organization and Effects and Division H, Applied Research in Schools, 2020 and 2021
- ▶ Honors Awards Chair for the Special Interest Group on Survey Research in Education, 2020

Member, North Carolina Association for Research in Education, 2010-present

Member, American Evaluation Association, 2011-present

Member, Florida Educational Research Association, 2017-present

### Education

Ed.D., Educational Leadership, University of North Carolina at Charlotte, member Kappa Delta Pi

M.B.A., with honors, concentration in Operations Management, The University of Texas at Austin, McCombs School of Business, Longhorn Scholar

B.A., *cum laude*, Government and Chemistry, Claremont McKenna College, member Phi Beta Kappa

# Stacy L. Williams

## Professional History

Prismatic Services, Inc.

Senior Consultant, 4/2022-present

Iredell-Statesville Schools

Director of Prime Time for Kids, GEAR UP and TSL Grants, 11/2017 - 11/2021

Statesville High School (9-12)

New Principal Support, 8/2017-11/2017

Pressly Alternative School (K-12) K-12 Tier III Alternative School

Principal, 8/2014 - 7/2017

South Iredell High School

Assistant Principal, 8/2013 – 7/2014

North Iredell High School

Freshman Academy Director, 12/2011 – 7/2013

I3 Grant

Lead Intervention Specialist, 1/2011 – 11/2011

N. B. Mills Elementary

Principal, 7/2005 – 12/2010

Monticello Elementary

Principal, 7/2006 – 6/2007

Lake Norman Elementary

Assistant Principal, 2/2005 – 6/2005

Statesville Middle

Assistant Principal, 7/2003 – 1/2005

Scotts Elementary 8/1996 – 6/2003

Teacher, 8/1996 – 6/2003

## Role Experience

Stacy completed final revisions for **Crescent Public Schools** school performance review for the **Oklahoma Office of Educational Quality and Accountability**.

She is currently consulting on projects for an equity and inclusion audit for **Eureka City Unified School District** in California. This is a district of 3,500 students with 8 schools.

She is also one of the consultants for an organizational and staffing study and human resources support for **Colleton County School District** in South Carolina. It is a school district of over 5,000 students and 9 schools.

Stacy is also working on a summative report for the 21<sup>st</sup> Century Community Learning Center after school program at the **Boys and Girls Club of Winder-Barrow County**, an annual report for **Fort Worth After School Program**, as well as, grant writing for a STOP Grant for **Miami-Dade County Public Schools**.

### Role Experience

Prime Time Director (before/after school care) Doubled enrollment in 8 months. **Awarded over \$3 million in grants**. Led program from - \$250,000 to profitable in 8 months. Responsible for hiring staff, providing professional learning, **marketing, grant reporting**, writing processes and procedures, addressing parental and staff concerns, building staff incentive program, **connecting programs with community partnerships**, staff scheduling, and budget oversight.

GEAR UP Grant Director - ensure grant strategies are implemented with fidelity; lead teams to plan and complete grant strategies; develop tools and resources focused on grant goals/initiatives; federal grant reports; analyze and track data and make course corrections; research and present grant initiatives to district leadership/principals; **develop strategies** to overcome grant implementation barriers AVID District Director - lead AVID implementation, **strategic planning**, and fidelity checks; lead district PLCs to guide implementation

TSL Grant Director - direct grant strategies focused on recruitment, support, and retention of teachers in high-needs schools, development of Performance Based Compensation System and Human Capital Management System Health and PE Teacher District Lead - **observe and support teachers**, conduct professional development, set goals and track data for department; Schedule and oversee **implementation of Wise Guys program** in high schools (DHHS Grant)

Principal and Principal Support:

- Provided **support administration** and staff during transition of new principal in Statesville High School
- Implemented Day Treatment **Mental Health Services** within the school; Began Restorative Justice practices which reduced suspensions by 30%; Began **work-based learning initiative** for high school students in Plessy Alternative School
- Made traditional High School **embedded International Baccalaureate School** in South Iredell High School
- 82% Free/Reduced Lunch; 20% Transient Rate; 17% Students with Disabilities Maintained 100% parent conference rate each year; **Continuous Improvement Practices leadership**; Implemented Standards-Based Grading system

Led and Supported Implementation of the following Initiatives:

- Restorative Justice, Why Try Social Skills Curriculum, Day Treatment Mental Health Services within a school setting
- Small Learning Communities at High School (Small Learning Communities Grant)
- Responsiveness to Instruction model/Multi-Tiered System of Support (i3 Grant) - coach Principals and **Leadership Teams**

- Continuous Classroom Improvement model - School-level and Supported Principals and School Leadership Teams
- Classroom Walk-Through Model, Technology Integration - School-wide
- Began More at Four preschool program at Elementary School
- Standards-Based, Failure is Not an Option Grading, Data-Driven Leadership utilizing EVAAS, EOG/EOC
- Reading Mastery and Corrective Reading
- Positive Behavior Support Initiative (PBiS)
- North Carolina School Improvement Process, Piloted and then Implemented North Carolina Teacher **Evaluation Process**
- Formative assessments - Using data to guide instruction, Assessment of Fidelity of Strategies (Guided Reading, Reading Mastery, etc.), Assessment of School Literacy Curriculum Program Effectiveness
- Process Improvement Model – Plan-Do-Study-Act, Professional Learning Communities
- Led District Reading and Mathematics PLC for teacher leaders, Implemented Co-Teaching Model for Students with Disabilities
- School-Level Administrator for District Low-Incidence Disability Classes, Innovative leadership in order to provide Physical Education to every student every day, duty-free lunch for teachers daily, one hour of planning for all teachers daily.
- Principal in Iredell-Statesville Schools during Malcolm Baldrige National Quality Award process.

### Professional Affiliations and Certifications

Iredell-Statesville Schools Principal of the Year, 2014-2015

Certified Trainer of Crucial Conversations, Crucial Accountability, and Influencer

Board Member for North Carolina Association for Alternative Education (NCAAE)

Member of District Student Placement Team

Elementary Principal of the Year for Iredell-Statesville Schools, 2008-2009

North Carolina School Administrator License (K – 12)

North Carolina School System Superintendent License

National Board Certification - Middle Childhood Generalist

Academically Gifted Licensure (K - 12)

Technology Teaching Endorsement (K - 12)

Teacher of the Year at Scotts Elementary

Professional Development Led:

- Behavioral Interventions 2015
- Crucial Conversations, Crucial Accountability, Influencer 2014
- Differentiated Instruction Professional Development for Teachers 2013
- EVAAS Data Analysis for Teachers 2013
- Dissertation on Effectiveness of SIOP Model in High School 2012
- Responsiveness to Instruction NC Model 2012
- Closing the Gap Conference Presenter, Greensboro, NC 2010
- Instructional Differentiation 2007-2008
- Technology Trainer 8/1998 - 6/2003
- Member of Teacher Academy Team 6/2001, 7/2002
- NC Center for the Advancement of Teaching Participant 2/2001
- Shadowed by Future Teacher 8/2000

#### Professional Development Completed

- Certified Trainer of Crucial **Conversations**, Certified Trainer of **Crucial Accountability**, Certified Trainer of **Influencer**
- Be an Ally Mental Health, First Aid, Responsiveness to Instruction by NCDPI
- Sheltered **Instruction Observation Protocol** (SIOP), Reading Foundations, Continuous **Classroom Improvement**
- L to J (Lee Jenkins), Baldrige: Train the Trainer Sessions, A Practical Way of Getting Better, Performance Excellence Sessions, Junior Great Books
- Teacher Academy: Learning Styles, Teacher Academy: English as Second Language, Underachieving and Learning Disabled Gifted
- Iredell-Statesville Schools' Technology Train the Trainer Program, Running Record Training
- Academically Gifted Differentiating Content and Product, Introduction to the Gifted and Modifying the Curriculum, Methods and Models of Teaching the Gifted
- Thinking Maps, Effective Teacher Training, Wright Group Guided Reading Seminar, Four Block Reading Program

#### Additional Activities and Relevant Experience

Co-Youth Director for Daystar Church (ages 11 - 17)

Children's Ministry at Daystar Church (ages birth to 10)

Church Pianist

Member of Committee for His Little Ones Child Care (Emphasis on Curriculum Development)

Trained SCAN (Stop Child Abuse Now) Intervention Volunteer

#### Education

Doctorate, Educational Leadership, Wingate University, 2011

Educational Specialist Degree, Wingate University, 2011

Williams - 4



MA, School Administration, Gardner-Webb University, 2004

MA, Elementary Education, Gardner-Webb University, 2000

BS, Elementary Education and Mathematics Concentration, UNC-Greensboro, 1996

# Jerrelle Williams

## Professional History

Devereux

Foster Home Licensing Specialist, 2015 - present

Hillsborough County School Board

Case Manager/Teacher, 2014-15

Pasco County Sheriff Department

Child Protective Investigator, 2010-14

## Professional Experience

Jerrelle has 10+ years of experience ensuring the safety of children. As a child protective investigator at the Pasco County Sherriff Department, Jerrelle's experience included:

- investigating any cases pertaining to the alleged abuse, neglect, and /or abandonment of children;
- conducting interviews with children and adults to ascertain the validity of the allegations;
- documenting living conditions; and
- conducting follow-up visits to ensure programs were being maintained and the safety of children.

As a case manager/teacher at the Hillsborough County School Board, his responsibilities included:

- providing special educational strategies and techniques to improve the development of sensory learning during instruction;
- documenting student records to prepare reports that are required by law; and
- providing crisis intervention as needed.

In his current position as a foster home licensing specialist, Jerrelle:

- assists in the planning and placing of children in foster family homes;
- completes all initial, renewal, annual, and adjustment licensing requirements; and
- investigates foster home licensing violations.

## Consulting Experience

Consultant with Prismatic Services for Osceola County System of Care grant in **Osceola County School District**, Florida. This grant provided different mental health services to students ages 5-12.

The five-year grant was funded by CDC/SAMHSA. Jerrelle interviewed assigned families every three months using the NOMS standardized interview guide.

### **Professional Certifications**

Child Welfare/Investigations Certification

### **Education**

M.S.W., University of Central Florida

B.S., Sociology, University of Florida

# Forms



## FORMS

### FORM 1 - Prospective Contractor Certification

By submitting this proposal, the prospective contractor certifies the following:

1. The contractor representative who signs below certifies that they have carefully read and understand the provisions of the solicitation and associated documents attached thereto, and hereby submits the attached proposal to perform the work specified therein, all in accordance with the true intent and meaning thereof.
2. The contractor representative further understands and agrees that by signing this certification all of the following information in the certification is true and accurate to the best of their knowledge. If this certification cannot be made unequivocally, a written description of all instances wherein the prospective contractor cannot unequivocally make this certification is provided with this proposal.
3. Prospective Contractor is:
  - Sole Proprietor
  - Partnership
  - Corporation\* if yes, what state? NC
  - Joint Venture
  - Other (Specify)
4. Other entities or individuals shall not be allowed to perform work or take contracted-related information or data outside the United States without advance written authorization from the CTAC's Project Manager. All personnel provided for work under this contract, who are not United States citizens, will have executed a valid I-9 form, Employment Eligibility Form, and presented valid employment authorization documents.
5. This proposal is signed by a representative who is authorized to commit the prospective contractor.
6. The entity identified below is the prime contractor.
7. The prospective contractor's insurance carrier(s) can provide insurance certificates as required within ten calendar days following notice of award.
8. The proposed prices have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such process with any other organization or with any competitor.
9. Unless otherwise required by law, the prices proposed have not been knowingly disclosed by the prospective contractor on a prior basis directly or indirectly to any other organization or to any competitor.
10. No attempt has been made, or will be made, by the prospective contractor to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
11. The price and availability of all equipment, materials, and supplies associated with performing the services described, including associated indirect costs and profit, herein have been determined and included in the proposed price. All labor costs, direct and indirect, and profit have been determined and included in the proposed price. The incremental costs expected to be incurred by the CTAC, should it enter into this contract, have also been estimated to the best ability of the prospective contractor. It is understood that the life cycle cost includes the total of the contract price plus the estimated costs to be incurred by the CTAC should it enter into this contract.
12. The prospective contractor can and shall provide the specified performance bond or alternate performance guarantee (if applicable) at no added cost to the CTAC.
13. In submitting its proposal, the prospective contractor agrees not to discuss or otherwise reveal the contents of the proposal to any source outside of the using or contracting CTAC, government or

- private, until after the award of the contract. Prospective contractors not in compliance with this provision may be disqualified, at the option of the CTAC, from contract award. Only discussions authorized in advance and in writing by the contracting CTAC are exempt from this provision.
14. The prospective contractor hereby certifies that it and all of its affiliates collect appropriate taxes and remits them as provided by law.
  15. The prospective contractor certifies that all insurance policies required by this contract shall remain in full force and effect during the entire term of this contract. All insurance policies and any extensions or renewals thereof, shall not be cancelled or amended except with the advance written approval of the CTAC. The Contractor agrees to submit certificates of insurance, which indicate coverage and notice provisions as required by this contract, to the CTAC upon execution of this contract. The insurance certificates shall be subject to approval by the CTAC. The insurance certificates shall include a statement in the certificate that no cancellation of the insurance shall be made without at least thirty calendar days' prior written notice to the CTAC. Approval of the insurance certificates by the CTAC shall not relieve the contractor of any obligation under this contract.
  16. The prospective contractor has read and understands the conditions set forth in this ITN and agrees to them with no exceptions. (If exceptions are taken, attach a written description of each exception to this certification.)
  17. The prospective contractor warrants, represents, and certifies that no elected or appointed official or employee of the CTAC has, or will, personally or indirectly benefit financially or materially from this contract.
  18. In the event any part of this Agreement or work is to be funded by federal, state, or other local agency monies, the Contractor hereby agrees to cooperate with the CTAC in order to assure compliance with all requirements of the funding entity applicable to the use of the monies, including providing access to and the right to examine relevant documents related to the work and as specifically required by the federal or state granting agency, and receiving no payment until all required forms are completed and submitted.
  19. Any contract and/or award arising from this ITN may be terminated for default by the CTAC if it is determined that gratuities of any kind were either offered to, or received by, any of the aforementioned officials or employees, or their close relatives or friends, from the prospective contractor, the prospective contractor's agent(s), representative(s), or employee(s). Any contract and/or award arising from the ITN may also be terminated for default if it is determined that the contract and/or award was obtained by fraud, collusion, conspiracy, or other unlawful means, or if the contract and/or award conflicts with any statutory or Constitutional provision of the State of Florida or of the United States.
  20. Prohibition Against Contingent Fees. The Contractor warrants that it has not employed or retained any company or person other than an employee working solely for the Contractor to solicit and secure this Agreement and that it has not paid or agreed to pay any person, entity, company, or firm any fee, commission, gift, or other consideration contingent upon or resulting from award or making of this Agreement.
  21. Therefore, in compliance with this Invitation to Negotiate, and subject to all conditions herein, the undersigned offers and agrees, that if this proposal is accepted within 90 days from the date of the opening, to furnish the subject services for a Not-to-Exceed Contract Price of \$ 93,955.

The following addenda have been received, and considered in the preparation of this proposal:

1+2  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I affirm and certify that: neither I, nor to the best of my knowledge, information, and belief, the entity identified below, or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies has been convicted of, or has had probation before judgment imposed pursuant to criminal proceedings, or has pleaded nolo contendere to a charge of bribery, attempted bribery, or conspiracy to bribe in violation of any state or federal law, except as indicated on the attachment [indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved, and their current positions and responsibilities with the business]:

Prospective Contractor Name: PRISMATIC SERVICES, INC.

Business Street Address: 1817 CENTRAL AVE #207


City, State, & Zip + 4: CHARLOTTE, NC 28205

Payment Address (if different): 601 SKINGS DR # F434

Payment City, State, & Zip + 4: CHARLOTTE, NC 28204

Federal Employer ID Number: 26-4031414

E-mail Address: TATIA@PRISMATICSERVICES.COM

By:  Title: PRESIDENT  
(Signature)

Name: TATIA PRIETO  
(Typed or Printed)

Unsigned certifications may result in a determination that the proposal is non-responsive.



**CHILDREN'S TRUST**  
OF ALACHUA COUNTY

**Invitation to Negotiate (ITN) Addendum**

6/27/2022

**Addendum No.:** 1

**Invitation to Negotiate:** 2022-05

**Project Title:** Listening Project

**Date of Addendum:** 6/27/2022

**ITN Due date:** July 15, 2022 at 3:00 PM ET

This Addendum No. 1 contains the following Questions

**1. If I currently have LMHC (Licensed Mental Health Counselors) that are contracted with S.O.A.R. Mentoring Services and Nurse Practitioners that are contracted with us, will they be considered sub-contractors for the ITN?**

Answer: No. Only include contractors that would be assisting you with accomplishing the tasks of Listening Project Scope.

**2. This will be my first time submitting a bid for an ITN. Should I complete the Model Contract For Services?**

Answer: No. The model contract is just an example of what the final contract will include.

**3. Is it a requirement for applicants to be located in Alachua County?**

Answer: No.

**4. How will CTAC confirm that businesses are qualified to conduct business in the state of Florida?**

Answer: CTAC expects to be able to pull an active SunBiz certificate for each applicant that submits a response to the ITN. <http://search.sunbiz.org/Inquiry/CorporationSearch/ByName>

**5. What information should be included with the references?**

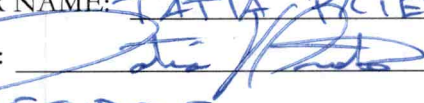
Answer: Page 11 of the ITN

RECORD OF PAST EXPERIENCE. This section shall be limited to a **maximum of 5** pages, and shall include:



- Background information of the organization and details of similar projects
- A list of references (including contact person, organization, e-mail and regular mail address and telephone numbers) for each of the above similar projects shall be included.

This addendum will become part of the Invitation to Negotiate and acknowledgement of its receipt should be submitted with the Invitation to Negotiate response. A signature on this addendum does not substitute for a signature on the original response. The original Invitation to Negotiate document must be signed.

RESPONDER NAME: TATIA PRIETO / PRISMATIC SERVICES  
SIGNATURE:   
TITLE: PRESIDENT  
DATE: 13 JUL 22



**CHILDREN'S TRUST**  
OF ALACHUA COUNTY

**Invitation to Negotiate (ITN) Addendum**

**6/30/2022**

**Addendum No.:** 2

**Invitation to Negotiate:** 2022-05

**Project Title:** Listening Project

**Date of Addendum:** 6/30/2022

**ITN Due date:** July 15, 2022 at 3:00 PM ET

This Addendum No. 2 contains the following Questions

**1. When sharing the results of the project will the youth or their families who engage in the listening project have the opportunity to become part of the larger strategic plan? Will the communities be notified of which recommendations from the listening project are elevated to the strategic plan? In a nutshell I would just like to know how the Childrens Trust will engage in continuing the work beyond the listening project.?**

Answer: The results and report from the Listening Project will be shared with the public when the contractor provides project updates to the Board.

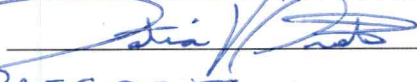
The Listening Project will guide the steering committee and feed into the Strategic Plan. It will elevate the voices of the community regarding how the Children's Trust can best serve children based on the resources, strengths, and gaps in services within the county. The Strategic Plan, Listening Project Report, and related Communication Products will be available on the Children's Trust website and will likely also be shared through other communication venues such as: social media, newsletters, press release, etc.

The Listening process, relationships, results, etc. will be used by CTAC's community engagement and communications team to further engage the project's participants.

**2. I would like to know if the application submission is required via mail or in person, printed and how many copies of the application we would need to submit. Additionally, I would like to know if can submit the application via email with an electronic document attached?**

Answer: Yes, response to the ITN should be emailed to the Trust using the following email: [procurement@childrenstrustofalachuacounty.us](mailto:procurement@childrenstrustofalachuacounty.us). Only one electronic copy is needed. Please remember to sign and submit all with your ITN submission.

This addendum will become part of the Invitation to Negotiate and acknowledgement of its receipt should be submitted with the Invitation to Negotiate response. A signature on this addendum does not substitute for a signature on the original response. The original Invitation to Negotiate document must be signed.

RESPONDER NAME: TATIA PRIETO / PRISMATIC SERVICES  
SIGNATURE:   
TITLE: PRESIDENT  
DATE: 13 JUL 22



# CHILDREN’S TRUST OF ALACHUA COUNTY LISTENING INITIATIVE



**CHILDREN'S TRUST**  
OF ALACHUA COUNTY

ITIN 2022-05  
Response Opening July 15, 2022 at 3:00 PM



**JULY 15, 2022**

Submitted by:

**CRL Media, LLC D.B.A CRL Media Advertising & Public Relations**

120 S. Olive avenue, suite 704

West palm beach, FL 33401

(561) 855-2144 office

CLAUDIA RUIZ-LEVY, President

[CLAUDIA@CRLMEDIAADVERTISING.COM](mailto:CLAUDIA@CRLMEDIAADVERTISING.COM)

Page	Contents
2	Cover Letter and Executive Summary of Proposal
3-7	Response: Record of Past Experience—Organizational Background and Similar Projects
8-20	Project Plan, Scope of Services, Proposed Methodology, Resumes, Sample Data Collection Tools
21-22	Subcontracting
23-24	Price/Budget
25-27	Attachment B: Insurance, Commercial General Liability, Worker’s Comp and Employer’s Liability, Professional Liability
28-30	Form 1- Prospective Contractor Certification
31-32	Invitation to Negotiate ITN Addendum

# Cover Letter

Dear Members of the Committee,

We are pleased to submit our letter of interest to offer Market Research Services for the CTAC Listening Project. CRL Media understands your needs and brings tremendous amount of experience in the field of qualitative and quantitative research, data analytics and community outreach.

## Executive Summary of Proposal

	1	2	3	4
Methodology	In-person Focus Groups (6)	Online Community-Bulletin Boards (2)	Individual Interviews	Community Town Hall Meetings (2)
Listening Participants	General market parents (5), Spanish-language groups (1)	Partners and Potential Partners (N=20)	Key informants and stakeholders (N=10)	Members of the community

## Organization Information

**CRL Media and Advertising** is an award-winning woman and minority-owned business with a stellar 15+ year track record of providing multicultural insight and initiatives that drive awareness, engagement, and brand development to a primarily Florida-based clientele.

We bring a highly skilled staff with “big name” client experience, to our chosen passion of helping strengthen non-profit, local and community-based organizations and businesses. CRL originally started as a Hispanic-focused agency, but as the population has changed and our reputation grew, our work has expanded to include multicultural/“one market” accounts. We are proud to tout a depth of cultural, ethnic and economic diversity within our staff and our client base that is rarely seen in a top firm.

CRL added a full-service marketing research division in 2020, in response to a growing demand from our clients for top-quality data-driven strategy development and meticulously-gathered qualitative insights. All research outlined in this proposal will be conducted using the highest standards of industry-compliant methodologies, execution and analysis.

## Commitment to Community Building and Non-Profits

Community building and support is one of the tenants of CRL Media’s core principles. Since its inception, CRL has teamed with a variety of not-for-profit organizations and community efforts. CRL Media President and CEO Claudia Ruiz-Levey has served on a variety of boards and appointed positions for a variety of charitable organizations, including The American Red Cross, The Hispanic Chamber of Commerce of Palm Beach County, Aspira Palm Beach, St. Jude’s Children Research Hospital. Our current non-profit clients includes the Kravis Center and Children’s Services Council of Palm Beach County.

***CRL Media has not had any contract terminated for default in the past five years or at any time.***

# Response: Record of Past Experience

## Organization background

**CRL Media** is an award-winning woman and minority-owned certified business, established in 2007, with a stellar track record of providing multicultural insight and initiatives that drive awareness, engagement, and brand development to a primarily Florida-based clientele.

We bring a highly skilled staff with “big name” client experience, to our chosen passion of helping strengthen non-profit, local and community-based organizations as well as corporate entities. As the cultural and ethnic mix of Florida has evolved, CRL Media has actively listened to the needs of its varied residents, guiding its clients to a better understanding of cultural and market nuances.

CRL Media added a full-service marketing research division in 2020, in response to a growing demand from our clients for top-quality, data-driven strategy development and meticulously-gathered qualitative insights. All research outlined in this proposal will be conducted using the highest standards of industry-compliant methodologies, execution and analysis.

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CRL originally started as a primarily Hispanic-focused agency, but as the population has changed and our reputation grew, our work has expanded to include all types of multicultural/“one market” integrated accounts. We are proud to tout a depth of cultural, ethnic and economic diversity within our staff and our client base. We actively seek out clients with similar goals and commitments.

# Record of Past Experience

## Similar projects

### 1. Children’s Services Council of the Palm Beaches

2021

**WHAT: Maximizing App and Website effectiveness in the Hispanic and Haitian communities**

**PURPOSE:** The agency needed to determine local parents’ most urgent needs and examine online/social media habits, to maximize its impact and budget for their proprietary website and app. The focus was on optimizing reach and messaging among hard-to-reach, underserved and marginalized cohorts (immigrants, economically disadvantaged, at-risk, etc.)—particularly the growing number of Hispanic and Haitian residents in Palm Beach County.

**METHODOLOGY:** A mixture of **Database Analytics**, **Qualitative** and **Quantitative** research was conducted, which included: 1. **CRL conducted an analysis of the demographics** of their current client database, to determine who they were successfully reaching, and where more effort was needed; 2. A quantitative survey that was programmed online, for which data collection took place both in-person at a local flea market popular with unacculturated (Spanish-speaking) residents, as well as via networking through local groups; 3. **Qualitative** in-depth interviews were conducted via Zoom amongst a handful of Hispanic and Haitian respondents who were hand-selected amongst the “stars” of the quantitative portion.

**OUTCOMES:** This research identified critical current and urgent needs in local underserved communities and clarified next steps in figuring out how to best reach these parents with important information. It provided a framework for visualizing how a much-needed large-scale initiative within these communities might look and how they could best leverage their efforts.

#### REFERENCE CONTACT INFORMATION:

**Christine Potter, Director of Communications**, Children’s Services Council of Palm Beach County, 2300 High Ridge Road, Boynton Beach, FL 33426, 561.374.7608,  
Christine.potter@cscpb.org.



# Similar projects, continued

## 2. Children’s Services Council of the Palm Beaches

2022 (Ongoing)

**WHAT:** Created a data-driven roadmap for large-scale multicultural initiative. Includes quantitative and qualitative methodologies as well as community outreach.

**PURPOSE:** This research created a roadmap to launch a large-scale multicultural initiative:

Clear, data-backed strategies are needed to launch a comprehensive multicultural program, including social media, app, website, YouTube channel, and community outreach.

**METHODOLOGY:** 1. Reviewed and conducted an analysis of posts/content of the top 10 local Spanish-language Facebook groups in Palm Beach County. 2. A community-based “Charla” or informal focus group was conducted at a local community center among immigrant Hispanic moms. This was conducted in Spanish, and gave great insight into their everyday lives, where they seek information and potential spokespeople; 3. An online focus group was conducted among social media users who participate in Spanish-language mom’s groups. This helped hone in on social media strategies and potential influencers, as well as set the foundation for an ongoing advisory panel. **OUTCOMES:** This research created a roadmap for developing and launching a Spanish-language Facebook group, how to implement strategies to reach the segments of the local community that aren’t easily reached via traditional and English-only media, and effectively plan ongoing outreach and content.

### REFERENCE CONTACT INFORMATION:

**Christine Potter, Director of Communications,** Children’s Services Council of Palm Beach County, 2300 High Ridge Road, Boynton Beach, FL 33426, 561.374.7608, Christine.potter@cscpb.org.

# Similar projects, continued

## 3. Nicklaus Children's Hospital System (South Florida)

2021

**WHAT:** Longitudinal ongoing online “Bulletin Board” community to serve as open, two-way communication between the hospital and parents throughout South Florida.

**PURPOSE:** As this entity expands its scope and geographical coverage of children's hospitals/urgent care facilities/primary care throughout South Florida, it was looking for a way to form an ongoing conversation with parents of children of different ages in the area.

**METHODOLOGY:** Quarterly online bulletin board events that do a deep dive on families' lives, concerns and experiences with medical providers. Communities incorporate a variety of topics from creative and messaging evaluation, to gathering a candid (private) read on how they feel about controversial issues like COVID vaccines and teen gender/sexual identity. **OUTCOMES:** We love this type of study because it yields an exponentially larger volume and quality of feedback, as compared to a traditional focus group setting. Every participant answers every question, in their own time and in as much detail as they like. Because answers can be set to private (not shared with the group), they are often more honest and detailed. These communities have helped the hospital system craft its position, tone, and strategies on touchy subjects, as well as to really connect and put human faces on the families they serve.

### REFERENCE CONTACT INFORMATION:

*Please note that this research was spearheaded by CRL's EVP of Research, Donna Russell, and was contracted another research firm, with whom she worked as an independent contractor for over 15 years. Nicklaus was the end client. Other similar projects for this client include:*

- *Atlanta Children's Hospital—several studies on branding, community outreach, awareness of services like WIC,*
- *Strong4Life ethnographies among underrepresented communities. re: website and app launch*
- *Center for Disease Control (CDC), various studies among Hispanic, general market families*

**Jackie Fernandez**, Owner/President, Inteligencia Research, 1431 Venetia Avenue, Coral Gables, FL 33134, 305.444.2456, [jackie.fernandez@inteligenciainc.com](mailto:jackie.fernandez@inteligenciainc.com).

## 4. Community Events

2007-2020

**WHAT:** Variety of Back-to-school events, Hispanic Heritage Month events

**PURPOSE:** CRL Media is known for being able to pull together sponsors, media and interesting vendors, for large-scale community events like back-to-school PR events, Holiday community parties and Hispanic Heritage Month activities sponsored by their clients, governmental entities and charitable organizations.

**EXAMPLES:** Community events hosted by a local Hispanic grocery chain: A back-to-school event sponsored by, in which over 3,000 attended and backpacks filled with school supplies were distributed in an underprivileged area. CRL used its extensive relationships with local media, other clients and non-profits to solicit sponsorship, food/beverages, music and live radio feeds. This event generated over \$50,000 in earned media. Another event was "Free Breakfast and Community Bail Out Campaign" which attracted over 5,000 to the supermarket and created over \$90,000 in earned media.

A very successful "guerilla sticker marketing campaign" was planned and implemented to help raise awareness of a local not-for-profit agency in underserved areas of the county. Local media promoted a "take your picture with the QR Code" scavenger hunt, in which residents who posted their pictures won prizes. This is an idea that other clients now plan to implement as well.

**We believe that these types of initiatives demonstrate our innovative thinking and love of boots-on-the-ground strategy development and implementation.**

### REFERENCE CONTACT INFORMATION:

**Luban Quiceno, Former General Manager at La Reina Supermarket  
(561) 352-4619**

# Project Plan: Proposed Approach & Methodology

## Overview and Project Approach

While one vision for the Listening Tour is to hold a series of events in nine communities throughout the county, we are proposing an alternative to that method that we believe will accomplish the goals of ensuring that CTAC's various stakeholders have meaningful input into CTAC's strategic planning, revealing findings that will allow the CTAC to develop priorities and strategies to address the identified needs and gaps while utilizing and mobilizing existing community strengths and resources, and maximizing the impact of CTAC resources in addressing the needs of Alachua County children. We believe that the methodologies we've proposed will provide the depth of feedback needed, while being gathered in a well-organized, consistent way.

The following is our proposal for CTAC's Listening Campaign 2022-2023



## Preliminary Planning

Before kicking off the Listening Tour, CRL will This project phase includes the developing of scripts, recruitment strategies, protocols, tools and materials; location procurement, staffing plan with work assignments, coordination with stakeholders, CTAC staff and board for approval.

# Project Plan: Potential Timeline

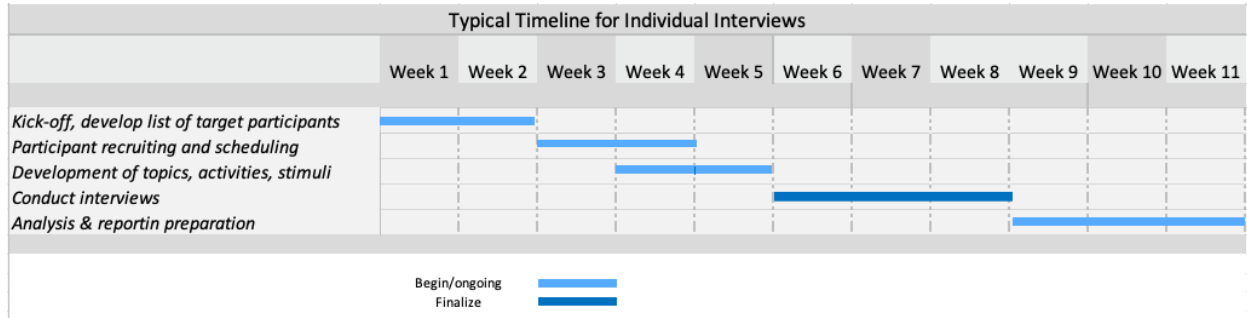
## Potential Approximate Timeline

The final order of research tasks and timeline may be developed during team work sessions and the planning process, and could potentially look like the below table. Please reference more detailed explanations of tasks on the following page as well.

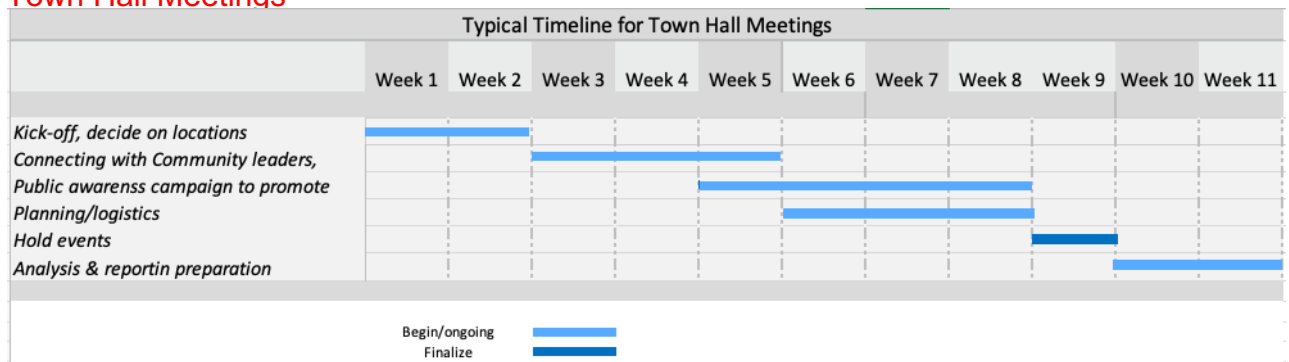
Date	Work	Milestones
August 2022	<ul style="list-style-type: none"> <li>Review of previous research and initiatives,, team planning workshops</li> </ul>	N/A
September 2022	<ul style="list-style-type: none"> <li>Begin processes for Interviews with key stakeholders and Town Hall Meetings</li> </ul>	
October 2022	<ul style="list-style-type: none"> <li>Field IDIs with key stakeholders</li> <li><i>Continue preparations for Town Hall Meetings</i></li> <li><i>Begin process for OBBs</i></li> <li><i>Begin planning for Focus Groups</i></li> </ul>	Project Plan Due 9/5/22
November 2022	<ul style="list-style-type: none"> <li>Field Module 3: Town Hall Meetings</li> <li><i>Continue recruiting and planning process for OBBs</i></li> </ul>	
December 2022	<ul style="list-style-type: none"> <li>Field OBBs (Early to mid-month)</li> <li><i>Begin field prep and recruiting for Parent Focus Groups</i></li> </ul>	
January 2023	<ul style="list-style-type: none"> <li>Conduct Parent Focus Groups</li> </ul>	
February 2023	<ul style="list-style-type: none"> <li>Conduct Parent Focus Groups (alternate dates)</li> </ul>	
March 2023	<ul style="list-style-type: none"> <li>Analysis and reporting</li> </ul>	Initial report due March 20, 2023; Final March 31, 2023
April 2023	<ul style="list-style-type: none"> <li>Prepare for board presentation</li> </ul>	Board Presentation April 10, 2023
May 2023		Communication Products Due May 15, 2023--initial; May 29, 2023--final

# Detailed Timeline Examples

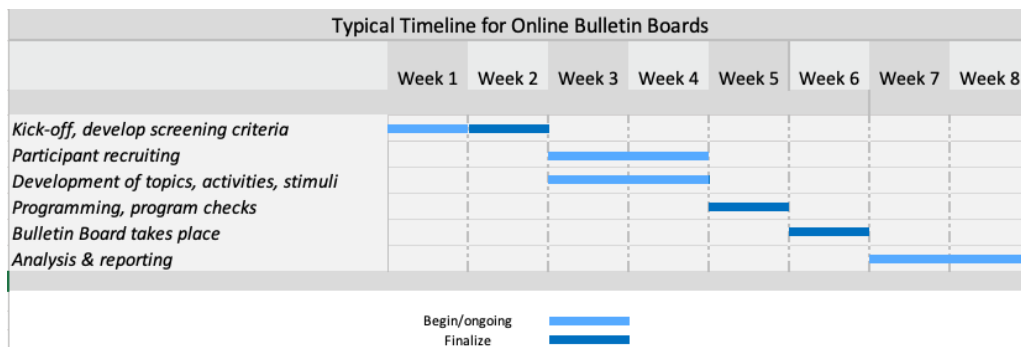
## Individual Interviews of Stakeholders



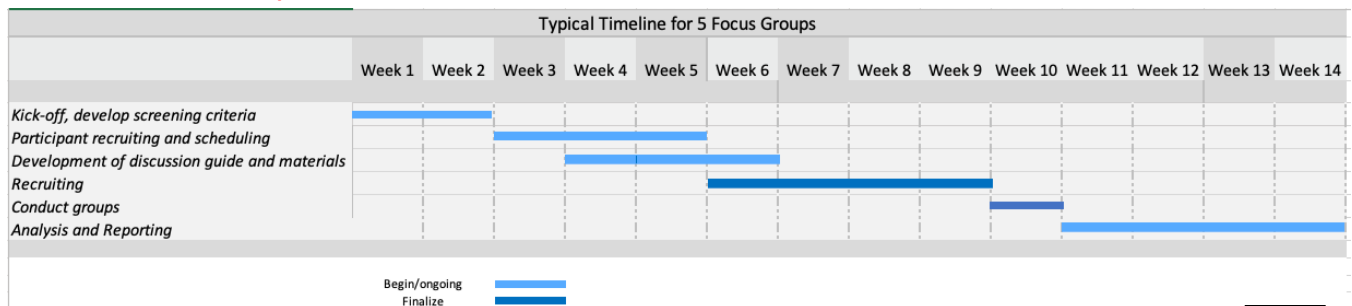
## Town Hall Meetings



## Online Bulletin Boards (Providers/Potential)



## Parent Focus Groups



# Proposed Methodology

## 1 In-person focus groups—select cohorts of parents

**WHY:** In order to include harder-to-reach communities (at-risk/at-promise, immigrant, etc.) as well as “mainstream” respondents, we believe in meeting them where they are and invoking human interaction.

**WHAT:** A total of six (6) In-person focus groups, 90 minutes each, five (5) in English and one (1) in Spanish (or four (4) in English and two (1) in Spanish, per client preference). The Spanish-language group will be a “Charla/Chat” using a more informal setting and flow.

**METHODOLOGY—English groups:** The four English-language groups may be conducted in a hotel, conference center, library, community center or church setting. We may wish to conduct two groups in Gainesville and two in a more rural area. We will recruit 8 participants to seat 5-7 per group. Groups will be video recorded and will have a live feed into a client observation room, if available and feasible.

**METHODOLOGY—Spanish group:** These groups will be conducted in an affiliate community center, daycare center, or the like. They will be modeled after similar groups conducted for CSC of Palm Beach County, which were a great success. We will invite 10-15 parents (who may bring their children) to participate in the discussion. Please note: we will rely on TCAC to work closely with us to identify affiliate organizations that would be good candidates and would help invite participants. This can serve as a relationship strengthener between CTAC and an affiliate as well, by renting their facility for the Charla and engaging their clientele.

**INCENTIVES:** Respondents will receive \$100 gift cards, e-cards or checks for their participation. These will be purchased and distributed by CRL Media.

**GROUP COMPOSITION:** There are several ways that may make sense to divide these groups. We may want to divide by ages of children (under 6, early elementary school, middle school, high school), by urban/rural, by mix of ethnicity, or some other method. Participants will be screened to include representation across key segments of interest.

**TOPICS:** CRL will work closely with CTAC to develop discussion guides appropriate to each group. Survey topics may include: support needed and missing, barriers to receiving that support, how they find out about services, awareness and perceptions surrounding CTAC, differences in needs over time, media and social media usage, etc.

**EXECUTION:** Recruiting may be handled through a variety of sources, including placing online ads, Facebook groups, referrals and outside recruiters.

## 2 Online Community/Bulletin Board (OBB)—Providers and Potential Providers (15-20)

**WHY:** Online Communities/Bulletin Boards are a highly effective way to gather a large volume of in-depth information from a group of up to 20 experts. This is a format that allows for interaction with others as well as sections that are confidential and can only be seen by the researchers. This format works especially well for studies with busy leaders, because panelists can log in anytime throughout the 2-day window.

**WHAT:** An online community or “bulletin board” study where pre-screened participants log in at their convenience once a day for 30 minutes or more, over a 2-day span.

**METHODOLOGY:** Panelists are given 5-7 “tasks” per day, which may include uploading photos/videos of themselves and their work/interaction with the community, answering polls, interacting/commenting on others’ opinions, etc. Moderators interact and ask follow up questions throughout the process as well. While tasks are varied, this methodology relies heavily on open-ended questions. We find that OBB participants take the time to go into a level of depth with their responses that is rarely seen in more time-prohibitive formats like focus groups or interviews. This is a highly interactive and fun experience for panelists and is very popular for soliciting honest, thorough feedback from experts.

**INCENTIVES:** Respondents will receive a \$125 e-gift card of their choice, from a variety available (Visa, Amazon, Darden Restaurants, etc.).

**COMMUNITY COMPOSITION:** Providers and Potential Providers will be chosen to represent a wide spectrum of voices, including non-profits, public sector and for-profit.

**TOPICS:** CRL will work closely with CTAC to develop tasks appropriate to each group (we may show different tasks to Partners/Potentials, for example). Topics may include: perceived community needs, optimizing the relationship between CTAC and partners, building trust, ideal key metrics, wish list of services they’d like to provide/see provided, etc.

**EXECUTION:** CTAC will provide a list of Partners and Potential Partners they consider good candidates for this community and will assist in recruiting by sending out invitations e-mails explaining the project and inviting them to “apply.” The recruit effort will consist of phone calls as well as CRL will provide a link to an online screener and we will jointly select participants among those who apply. Potential partners will be identified via referral from Partners CTAC, and local organizations. The programming and hosting for the community will be outsourced to a research platform that specializes in this methodology. Please note that our preferred vendor is a UK-based firm; however, similar US-based vendors are available if preferred or required. They will also handle distribution of incentives.



# Proposed Methodology

## 3 Individual Interviews—Key Informants, Stakeholders (10)

**WHY:** Key Informants and Stakeholders’ opinions and input are critical to CTAC’s success as they have specific touchpoints throughout the community.

**WHAT:** In-depth individual interviews with 10 key informants.

**METHODOLOGY: 1. Individual interviews** will be conducted by CRL senior moderators (Claudia Ruiz-Levy and Donna Russell) via Zoom. Interviews will be up to 60 minutes in length and will be recorded for the purpose of reporting; these videos will be kept confidential and not turned over to CTAC. This ensures participants that they can speak freely and confidentially. Reporting will be in aggregate.

**INCENTIVES:** Respondents will receive a check for \$150 for participation in the interview, and an additional \$100 for participation in the Advisory Panel.

**SELECTION:** A variety of participants may include community leaders, Gainesville for All, pediatricians, faith groups, fundraisers, etc.

**TOPICS:** CRL will work closely with CTAC to develop tasks appropriate to each group (we may show different tasks to Partners/Potentials, for example). Topics may include: perceived community needs, optimizing the relationship between CTAC and partners, building trust, ideal key metrics, wish list of services they’d like to provide/see provided, etc.

**EXECUTION:** CTAC will provide a list of any potential participants they may have identified and will assist in recruiting by leveraging their name and personal connections, by sending e-mail invites or extending direct invitations to leaders who are known to them. CRL will partner closely with CTAC in identifying other relevant voices/participants as needed, to reach the 10 panelists desired. CRL will handle distribution of incentive checks.

# Proposed Methodology

## 4 Community Town Hall Meetings (2)

**WHY:** While one vision for the Listening Tour was to hold a series of events in 9 communities throughout the county, we are proposing an alternative to that method. Voices from the other areas will be incorporated throughout the focus groups, OBBs and Individual Interviews. However, we see the potential for low turnout/a small number of voices to include in the smaller communities, as well as more logistical challenges that could potentially eat away at budget and yield less-than-optimal data gathering efforts.

**WHAT:** We propose holding 2 Town Hall meetings, one in Gainesville and one in a more rural community. Other communities will be represented via focus groups, OBBs and Individual interviews with community leaders from those areas.

**METHODOLOGY:** We will coordinate with a CTAC-friendly organization such as churches, community centers, etc., to invite members of the community at large to voice their opinions and concerns. These will last no more than 2 hours and will be attended by CTAC executives as well as CRL Moderators and identified community leaders.

**INCENTIVES:** Prizes and light snacks will be provided, to encourage participation.

**TOPICS:** CRL will work closely with CTAC to develop an agenda for each Town Hall.

**EXECUTION:** CTAC will assist in selecting potential locations and making appropriate introductions to leaders who will help host or promote these events. CRL will provide physical and online announcements/invitations to the communities.

CRL will create and distribute press releases to the local media outlets to generate interest.

# Project Plan: Deliverables

## Initial Planning

### Deliverables:

- Write-up of insights gained, questions and topics to review with CTAC team upon reviewing previous research and efforts
- Meeting agendas and summaries of all planning sessions
- Documentation on approved plan to move forward and specific timelines

## 2. In-person Focus Groups

### Deliverables:

- Discussion Guide (includes translation for Spanish)
- Programmed screener to see who qualifies
- Participant grid
- Moderation
- Incentives and fulfillment
- Video recordings of groups
- Full analysis and reporting in PowerPoint (samples below)

**Influencer evaluations**

**Carlos Mahecha**  
Media personality

**Albany Rojas**  
Influencer @albanysrojas, law student, member of Latina Latina III group

**Erid Cochran Rivera**  
High school musician, life coach, educational expert, Model

**Internet access and social media**

**Fairly tech-savvy**  
This group is more tech-savvy than the Experiencia Center group, and use social media for connecting with others, making friends, seeking out information, keeping in touch with family here and in their home countries, and entertainment.

**How they connect**  
These women use Facebook and WhatsApp most often and are involved in groups on both, however, Facebook is the clear winner for participating in groups and seeking out information. Some also mention using Instagram.

**Information sought**  
In contrast to the Experiencia groups, the moms in this group have older children. Seeking out information about their education is a theme they bring up often. Many are highly engaged in ensuring that their children receive the best education possible. They feel like there's so much information out there, it can be overwhelming.

**Daily challenges for local Latina moms**  
Hispanic immigrants to Palm Beach County face many obstacles

**Arriving with nothing**  
Many who experienced arriving in the US with only one suitcase. Many are struggling to find a place to stay, find a job, and learn the language. Some have limited mobility, so they can't afford to take a car to work. They look for opportunities to interact and connect with others in person.

**Isolation**  
Many find it difficult to make new friends outside the area of community they had in their home countries. Many have limited mobility, so they can't afford to take a car to work. They look for opportunities to interact and connect with others in person.

**Where to turn**  
These women were familiar with nearby (Miami) Health Services, Bridges, INC, The Guatemalan Migration Center and Experiencia Center, so when they could turn to them for help and support. They also look for their informal networks, and local shops, religious, community, etc.

**Finding work**  
Finding a job comes with many challenges for these women. In addition to their language barrier, they lack the capital skills, transportation, and often have "limited ability to work" for an entrepreneur for the actual job.

**Navigating new systems**  
These women describe the feeling of "being lost" when they first arrived in the US. Navigating the complex systems of the US, including the healthcare system, is a challenge.

**Not speaking English**  
Group participants believe the ability to speak English is one of the most important skills for them. They often struggle to find a job or a place to live. They often have to rely on their informal networks and community with their families, but also for their work and manage their daily lives.

**APPLIED ACTION**

**RECOMMENDATIONS**

# Project Plan: Deliverables, continued



## 3. Online Bulletin Boards (OBB)

### Deliverables:

- Discussion/Task Guide
- Screening program
- Participant grid
- Access to back room
- Hosting
- Full transcripts of sessions in Excel
- Incentives and fulfillment
- Full analysis and reporting in PowerPoint (samples below)

### Parents are under great pressure – financially, emotionally and mentally

**Increased cost of living**  
South Florida has seen a staggering increase in the cost of living recently. Skyrocketing rental/real estate costs, lack of affordable daycare, and inflation have left many families scrambling. Parents are taking on second jobs, moving in with family and cutting costs to make ends meet.

**Healthcare costs**  
Our parents worry about keeping up with the increasing cost of medical insurance, and being able to pay for medical needs not covered—OOP, copays, dental and vision care, etc. Several of their children have faced serious illnesses requiring extensive care, putting a strain on the family's finances and adding to their stress.

**Mental health**  
Moms in this study view their child's mental and emotional health as just as important as their physical health. Many worry about the effects of the pandemic, school interruptions, bullying, etc. on their child's mental health. Those whose children have been diagnosed, feel there are more options for treatment and support.

**Uncertainty in parenting**  
Parents can feel overwhelmed with information when it comes to parenting, and don't always know which sources they can trust. They are under extreme scrutiny to "get it right," and often second-guess their parenting decisions. This can be compounded by having their lives "out there" on social media.

### YouTube captures the very young; tweens are online, and teens are fully engaged

And which of the following, if any, does your child/ren use, even if it's occasionally?

6 and Under n=17 parents*	7-12 years old n=23 parents*	13-17 years old n=14 parents*
YouTube (13) None (3)	YouTube (21) TikTok (8) WhatsApp (4)	TikTok (11) YouTube (9) Snapchat (9) Instagram (9)

\*Several parents have children in more than one age group

### Online groups connect, inform...and confuse

**Groups are a great resource for connection, community and referrals**  
"People who are dealing with some stuff I am." -- PB, Under 6 & 7-12, Non-user  
"I mostly use them to find recommendations and reviews on local childcare, schools, babysitters, and buy and sell children's items." -- PB, 13-18, User

**It can be hard to know if the information in groups is reliable**  
"You have to be able to discern what is good information and what is nonsense." -- Broward, Under 6 & 7-12, User  
"Sometimes they're just oversaturated with information. It becomes overwhelming." -- Broward, 7-12, Non-user

**Moms want more expert voices and smaller, more personal groups, including the chance to meet "in real-life"**  
"If there were a group run by pediatric doctors answering general questions for parents, it could help prevent parents from misapprehending their kids and only trusting the opinions of fellow parents." -- Broward, Under 6, Non-user  
"I would like a more personal online group of moms to share day-to-day parenting struggles with. Perhaps a smaller group that lives near me and that could meet up once a month." -- Miami-Dade, Under 6, User

### Lucy | SAHM

Palm Beach | 41 to 55 | Married | GIRL-4, BOY-10, GIRL-17  
Some college | Hispanic | \$125K+

**Who I am**  
I am a Colombian mom that homeschools my 3 kids, mostly due to my autistic child which has been a challenge.  
I feel it's important to keep my kids on track academically, and I often question myself as to whether "I'm doing things right."

**Worries and struggles**  
The ability to afford good health insurance and to make the right decisions when it comes to my children's health is a major challenge.  
I worry about having enough money to pay for all their medical needs. My husband makes a good living, but medical costs are increasing, as is the cost of living.

**What I worry about**  
I wonder if I'm doing things right, worry about my child's mental health, finding information I can trust about my family's health, and knowing if I've made the right decisions when it comes to my children's health.

**Social media and information seeking**  
Go to's, Kaltura.com, Reddit, Facebook, Pinterest, WebMD, and Mayo Clinic.  
"I would prefer to hear about health from a medical specialist (pediatrician), even better if they are also a parent."

41 to 55 | Married | GIRL-4, BOY-10, GIRL-17  
Some college | Hispanic | \$125K+

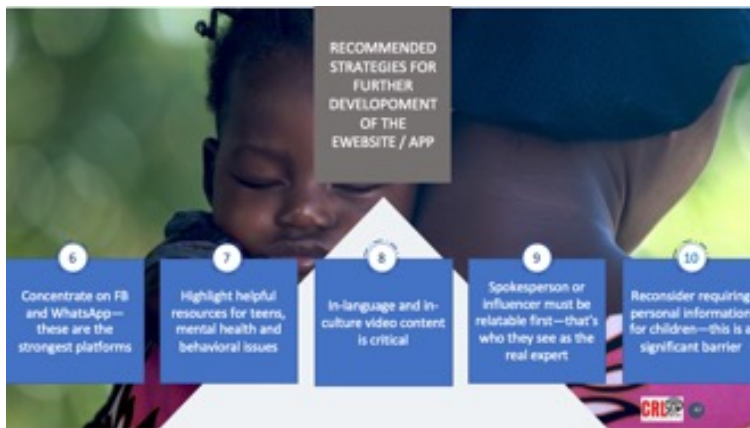
44 "My family is my LIFE"

# Project Plan: Deliverables, continued

## 4. Individual Interviews

### Deliverables:

- Introduction script for e-mails
- Participant grid
- Videos of interviews
- Transcripts of interviews (Computer generated)
- Incentives and fulfillment
- Full analysis and reporting in PowerPoint



## 5. Town Hall Meetings

### Deliverables:

- Ongoing updates as to who/how/when partners have been contacted
- Coordination of logistics—set up, clean up afterward, etc.
- Light snacks and drinks
- Purchase of door prizes
- Summary reporting, including prioritization of action items and recommendations

# Key Staff: Claudia Ruiz Levy



## Claudia Ruiz Levy

### *President & CEO*

#### Experienced Leader

15 years at the helm of CRL Media, named one of the Top 10 PR Firms in PBC for past 4 years

Recognized expert and leader in multicultural and community topics

#### Basis for Team Selection

Established success as a DEI consultant to corps and non-profits

Relationship with community and civic leaders and journalists

Served on the Board of Directors for several local non-profit organizations

#### Credentials

Goldman Sachs 10K Small Business Alumni, Hispanic Woman of Distinction, Latina Entrepreneur of PBC

B.A. in Advertising from Catholic University at Manizales - Colombia

Journalism, from Autonomia University, Cali, Colombia

#### Experience

Ms. Ruiz Levy has more than 20 years' experience in advertising, marketing and public relations. She launched CRL Media in 2007, a Florida-based multicultural shop. The firm has grown and evolved with the dynamic changes in the Florida community, increasingly attracting integrated and general market work in addition to its Hispanic roots, and earning several awards.

Ms. Ruiz Levy started her career at one of the largest ad agencies in the world: McCann Erickson, where she managed multinational accounts such as Bayer Pharmaceuticals and Gillette.

Her passion for giving back to the local community is evidenced throughout her work. She served as Chair of Volunteers for the American Red Cross, Board member of NSU Palm Beach County Advisory Board, Hispanic Chamber of Commerce, Aspira, and Walk Chair for St. Jude's Children's Research Hospital local Walk,

#### Relevant Experience

- **Children's Services Council of Palm Beach County**—ongoing research, awareness and engagement campaigns and consulting for digital strategies for the Hispanic and Haitian markets in Palm Beach County
- **Kravis Center for the Performing Arts.** Ms. Ruiz Levy and her CRL team are responsible for the Kravis Center's Spanish language communications and promotions to the Hispanic community which in less than a year received over \$250,000 in earned media and increased the Center's Spanish audience by 10%.
- **Helix Urgent Care of Palm Beach and Broward**—Marketing, PR, Event Management & Community Outreach. CRL Media has been with this rapidly-growing chain of urgent care centers and now virtual health provider, since its inception. An important part of its growth strategy has been successful community outreach events among a variety of local residents/populations, including marginalized and underprivileged communities.
- **La Reina Supermarkets**—Marketing, Public Relations, Event Management & Community Outreach. Ms. Ruiz Levy was responsible for creating large events for the community as well as creating marketing and public relations material, media placements and community outreach for the company. The "Free Breakfast and Community Bail Out Campaign" attracted over 5,000 people and created over \$90,000 in earned media.

# Key Staff: Donna Russell



**Donna Russell**  
*EVP, Research*

## Experienced Leader

20 years' experience as a consultant and researcher teaming with major brands, agencies and government agencies

Pioneered several techniques that have become standard practice in Hispanic, Multi-ethnic and Whole Market branding

Wheelhouse that includes advanced Quantitative and Qualitative research techniques, Corporate immersion events, Data Analytics and Visualization

## Credentials

B.S. in Marketing and Spanish,  
Virginia Commonwealth University

Fluent in Spanish

## Experience

Ms. Russell was tapped to launch the research division of CRL Media in response to clients' growing need for data-driven research and "human connection" insights.

Her early career as a consultant with her own firm for 12 years, focused primarily on consulting global organizations (Kraft, MasterCard, ConAgra, Target, Hershey's etc.) to navigate the increasingly multicultural environment in which they do business. As a "gringa" who has lived and worked in several Latin American countries and cultures, she developed a knack for translating cultural nuances and insights into the boardrooms of US-based firms, enabling them to craft relevant branding.

Ms. Russell is a seasoned researcher and RIVA-trained moderator, with expertise in quantitative and qualitative techniques, data analytics and visualization.

Her career path has enabled her to indulge in exploration of several aspects of interest, including "tech initiatives for whole humans" (Microsoft, Apple, SAP and others), Data Analytics for a Top 3 Research firm (Kantar) and more recently, advanced studies in Data Visualization. As part of "The Great Resign" trend during the pandemic, Ms. Russell decided to leave the corporate grind and return to her first love and passion—making a difference for non-profits and growing local firms. She joined CRL Media as head of its research department in 2020.

## Relevant Experience

- **Children's Services Council of Palm Beach County**—research lead for ongoing initiatives
- **Nicklaus Children's Hospital**—Creation and execution of a major longitudinal community and advisory panel of parents throughout South Florida
- **Atlanta Children's Hospital and Strong4Life**—various studies among underserved communities including Hispanic, AA and economically disadvantaged
- **Variety of child-focused research** for major corporate and governmental organizations such as Kraft Mac-n-Cheese, Center for Disease Control (CDC), US Census, Target and Toys-R-Us

# Key Staff: Tatiana Munevar, Juana Mejia and Jannette Matos



## Tatiana Munevar, Field Manager

Ms. Munevar's has a background in journalism for The Sun Sentinel and other publications, where she honed valuable skills such as identifying and making connections with community leaders, and knowing how to extract the most relevant information from an interview.

She is a multimedia and bilingual editor and journalist with experience in content generation and design and implementation of digital strategies.

Ms. Munevar holds a B.A in Journalism from Javeriana University (Colombia).



## Juana Mejia, Project Manager

Ms. Mejia oversees the day-to-day PM of several accounts. Her meticulous organizational skills and ability to keep projects on budget and timeline were first by working as a legal assistant for a top area legal firm and at the Palm Beach State Attorney Office.

Ms. Mejia holds an Associate's Degree from Palm Beach State Honors College and is currently enrolled in Florida Atlantic University to earn her BA in Sociology and minor in Communications.

She actively volunteers with La Esperanza Center, committed to improving the experiences of immigrant families and building strong ties with the community



## Jannette Matos, Recruiter and Field Supervisor

Ms. Matos is an experienced recruiter, field service coordinator, on-the-ground field supervisor, project coordinator, interviewer and interpreter. She is fully bilingual and bicultural. Ms. Matos has been a valued team leader and go-to freelance talent for a variety of market research studies that CRL and senior staff have conducted over the years.

Some of the projects she has supervised include CDC, Corona/InBev group, Mercantil Bank, Delta Airlines and many others.

Ms. Matos studied Business Administration at the University of Puerto Rico.



# Subcontracting

## Individuals and Firms proposed for subcontracting

**Approximately 10% of budgetary resources for this job will be subcontracted.** This is primarily for programming, hosting and A/V needs. (Breakdown: 75% In-house labor, including planning, admin, moderating, interviewing, field coordination; 10% Outsourced/Subcontracted programming & hosting; 8% Incentives and prizes; 7% Facility rental and travel.

### 1. In-person Focus Groups

TASKS	PERSON(S) ASSIGNED
Client Point Person, Oversees all aspects, Lead moderator for Spanish Charlas, Co-moderator for English	Claudia Ruiz-Levy, Principal
Client Co-Point Person, Lead moderator for English groups, Co-moderator for Spanish, Discussion Guide development, analysis and reporting	Donna Russell, EVP Research
Field service management, programming screeners, participant management, report support as needed	Juana Mejia, CRL Program Manager and Jannette Matos, Contractor, Tatiana Munevar, Field Manager
Audio-visual support (video recording of English-language groups, livestream if available, video management)	Contractor—at each facility

### 2. Online Bulletin Boards

TASKS	PERSON(S) ASSIGNED
Client Point Person, Oversees all aspects, Co-Moderator	Claudia Ruiz-Levy, Principal
Client Co-Point Person, Guide/Task development, programming checks, Lead Moderator, analysis and reporting	Donna Russell, EVP Research
Field service management, report support as needed	Juana Mejia, CRL Program Manager and Jannette Matos, contractor
Provide platform and programming, Participant management—send invites and reminders, track participation, tech support, Incentive fulfillment	Contractor—our preferred vendor is UK-based; however, a similar US firm may be used if required <a href="http://www.incling.com">www.incling.com</a>

# Subcontracting



## Individuals and Firms proposed for subcontracting

### 4. Individual Interviews and Advisory Council Session

TASKS	PERSON(S) ASSIGNED
Client Point Person, Oversees all aspects, Contact potential respondents and schedule interviews, Executive Interviewer for IDIs	Claudia Ruiz-Levy, Principal
Client Co-Point Person, Lead Executive Interviewer for IDIs, Discussion Guide development, analysis and reporting	Donna Russell, EVP Research
Administrative support, participant management, report support as needed	Juana Mejia, CRL Program Manager and Jannette Matos, contractor, Tatiana Munevar, Field Manager

### 4. Community Forums

TASKS	PERSON(S) ASSIGNED
Client Point Person, Oversees all aspects, Moderator	Claudia Ruiz-Levy, Principal
Client Co-Point Person, Moderator, reporting	Donna Russell, EVP Research
Administrative support, logistics coordination, report support as needed	Juana Mejia, CRL Program Manager and Jannette Matos, contractor, Tatiana Munevar, Field Manager
A/V needs	Provided through venues or local contractor.

# Price

<b>Budget Overview</b>	<b>\$</b>	<b>98,242</b>
<b>Summary of Costs</b>		
In-house labor, including planning, admin, moderating, field coordination	\$ 73,225	75%
Outsourced: Programming, hosting	\$ 10,200	10%
Incentives, Prizes	\$ 7,700	8%
Facility Rental	\$ 4,500	5%
Travel	\$ 2,617	3%
<b>Project Total</b>	<b>\$ 98,242</b>	<b>100%</b>

<b>Planning Sessions and Review of Previous Initiatives</b>		<b>\$ 15,000</b>
In-house	Includes review of previous research and initiatives, 2-3 hours of team sessions with CTAC	\$ 15,000
	<i>Sub-total, Planning</i>	<i>\$ 15,000</i>
<b>2. Focus Groups among Parents: In-person, 5 groups total (1 Spanish, 4 English)</b>		<b>\$ 36,443</b>
	4 general market in-person focus groups, Recruit 9 to seat 5-7	
Facilities	Facility rental 2 days, possibly 2 locations, incl A/V, snacks	\$ 3,000
In-house	Recruiting @ \$125 pp, 36 people	\$ 5,625
In-house	Moderators @ \$2500 per group	\$ 10,000
Incentives	Incentives @ \$75 pp, 36 people	\$ 2,700
Outsourced	A/V equipment and tech. @1K per day	\$ 2,000
In-house	Administrative/Field Management	\$ 2,000
In-house	Analysis and reporting	\$ 3,000
	<i>Sub-total, General Market Focus Groups</i>	<i>\$ 28,325</i>
	Spanish-language "Charla/Chat" informal focus group	
Facilities	Facility rental one day	\$ 500
In-house	Administrative--coordinate with facility director, publicize/invite/remind participants, screening and scheduling, 30 hours \$25/hour	\$ 750
In-house	Moderators (2)	\$ 2,500
Incentives	Incentives @ \$50 pp, 20 people or similar raffle	\$ 1,000
In-house	Translation of materials, analysis and reporting	\$ 2,000
	<i>Sub-total, Spanish Charlas</i>	<i>\$ 6,750</i>
	Travel including Spanish and English groups (held on 2 consecutive days)	
Travel	Mileage from West Palm Beach 700 miles @ \$.62/mile	\$ 438
Travel	Hotel-3 nights, 2 rooms @ \$96/night	\$ 576
Travel	Meals @ \$59 per diem, 3 days, 2 people	\$ 354
	<i>Sub-total, Travel includes all groups if done over 3 days</i>	<i>\$ 1,368</i>

Continued on next page

# Price, continued

## Detailed Budget

<b>2. Online Community Bulletin Boards (2): Service Providers (1) and Potential Providers (1)</b>		<b>\$ 25,700</b>
<b>Online Bulletin Boards up to 20 participants each (recruit 20 to seat 15)</b>		
In-house	Recruiting/field coordination @ \$125pp, 25 to seat 20 in each group	\$ 6,250
In-house	Guide development	\$ 2,000
Outsourced	Programming and hosting, set up, tech support, invites/reminders	\$ 8,200
In-house	Incentives @\$125 pp includes fulfillment	\$ 6,250
In-house	Reporting	<b>\$ 3,000</b>
<i>Sub-total, OBB</i>		<b>\$ 25,700</b>
<b>3. Key Informants--Zoom IDIs</b>		<b>\$ 12,250</b>
<b>N=10, 45-60 minute Individual interviews plus a live online session</b>		
In-house	Recruiting @\$125 pp	\$ 1,250
In-house	Interviews/Moderating @\$500 each	\$ 5,000
In-house	Reporting	<b>\$ 3,000</b>
Incentives	Incentives of \$250 each plus admin processing	\$ 3,000
<i>Sub-total, IDIs and Advisory Meeting</i>		<b>\$ 12,250</b>
<b>4. Community Meetings Town Hall</b>		<b>\$ 8,850</b>
<b>Two (2) Town Hall-style meetings in different geographic locations</b>		
In-house	Publicity, coordinate with community leaders that have been identified and worked with CTAC previously	2000
Facility Rent	Facility rental (2 locations)	1000
In-house	A/V equipment and personnel (2 days)	1000
In-house	Light snacks	300
Incentives	Raffles at \$500 per meeting	1000
In-house	Misc. equipment as needed (Visuals, tables, chairs, whiteboards, etc.)	300
In-house	Reporting	2000
<i>Sub-total, Town Halls</i>		<b>\$ 7,600</b>
<b>Travel</b>		
Travel	Mileage from West Palm Beach RT, 700 miles	\$ 438
Travel	Hotel-3 nights, 2 rooms @ \$96/night	\$ 576
Travel	Meals @ \$59 per diem, 2 days, 2 people	\$ 236
<i>Sub-total, Travel</i>		<b>\$ 1,250</b>

# Attachment B: Insurance Commercial General Liability



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
02/28/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**


PRODUCER Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328	CONTACT NAME:		
	PHONE (A/C, No. Ext): (888) 202-3007	FAX (A/C, No):	
	E-MAIL ADDRESS: contact@hiscox.com		
	INSURER(S) AFFORDING COVERAGE	NAIC #	
INSURED CRL MEDIA LLC 120 S Olive Ave Ste 704 West Palm Beach FL 33401	INSURER A:	Hiscox Insurance Company Inc	10200
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

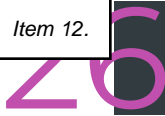
**COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADD'L SUBR INSD. WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		UDC-5097113-CGL-22	02/28/2022	02/28/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 0 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPI/OP AGG \$ S/T Gen. Agg. \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N <input type="checkbox"/> N/A If yes, describe under DESCRIPTION OF OPERATIONS below					PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION
	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 



# Attachment B: Insurance Workers Comp and Employers Liability

## Technology Insurance Company, Inc.

A Stock Insurance Company  
20 Trafalgar Square, Suite 459  
Nashua, NH 03063

WORKERS COMPENSATION  
AND EMPLOYERS LIABILITY  
INSURANCE POLICY

WC 99 00 01 B

INFORMATION PAGE

Ncci Code: 39071

1.	Insured:	<b>Policy Number:</b>	<b>TWC4074225</b>
	<b>CRL Media LLC</b> 201 South Olive Avenue Suite 704 West Palm Beach, FL 33401	<input type="checkbox"/> Individual	<input type="checkbox"/> Partnership
	Other workplaces not shown above: See Extension of Information Page	<input type="checkbox"/> Corporation or	<input checked="" type="checkbox"/> LLC
	Producer:	Federal Tax ID:	68-0646152
	AmTrust North America, Inc. c/o CoverWallet, Inc DBA CWALLET Insurance Services in CWALLET Insurance Services in CA P. O. Box 6718 Somerset, NJ 08875	Risk ID:	
		Renewal of:	TWC3962521
2.	The policy period is from	3/1/2022 to 3/1/2023	12:01 a.m. at the insured's mailing address.
3.	A. Workers Compensation Insurance: Part One of the policy applies to the Workers Compensation Law of the states listed here: Florida		
	B. Employers Liability Insurance: Part Two of the policy applies to work in each stated listed in item 3.A. The limits of our liability under Part Two are:		
	Bodily Injury by Accident	\$ 100,000	each accident
	Bodily Injury by Disease	\$ 500,000	policy limit
	Bodily Injury by Disease	\$ 100,000	each employee
	C. Other States Insurance: Part Three of the policy applies to the states, if any, listed here: All states except ND, OH, WA, WY and State(s) Designated in Item 3A.		
	D. This policy includes these endorsements and schedules: See attached endorsement schedule.		
4.	The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates and Rating Plans. All information required below is subject to verification and change by audit.		
	See Extension of Information Page		
	<b>TOTAL ESTIMATED ANNUAL PREMIUM</b>		<b>192</b>
	<b>STATE ASSESSMENT</b>		<b>0</b>
	<b>TOTAL ESTIMATED COST</b>		<b>192</b>
	Minimum Premium		192
	Deposit Premium		192
	Issue Date:	1/28/2022	
	Countersigned By:	_____	
		Authorized Representative	

# Attachment B: Insurance Professional Liability



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/14/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Hiscox Inc. 5 Concourse Parkway Suite 2150 Atlanta GA, 30328	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (888) 202-3007 FAX (A/C, No): E-MAIL ADDRESS: contact@hiscox.com			
	<b>INSURER(S) AFFORDING COVERAGE</b>			
<b>INSURED</b> CRL MEDIA LLC 120 S Olive Ave Ste 704 West Palm Beach, FL 33401	INSURER A:	Hiscox Insurance Company Inc	NAIC #	10200
	INSURER B:			
	INSURER C:			
	INSURER D:			
	INSURER E:			

**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		Y/N	N/A			<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability		N	UDC-4340116-EO-21	11/26/2021	11/26/2022	Each Claim: \$ 1,000,000 Aggregate: \$ 1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES** (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
Marketing firm

<b>CERTIFICATE HOLDER</b> CRL MEDIA LLC	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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# Form 1- Prospective Contractor Certification

## FORMS

### FORM 1 - Prospective Contractor Certification

By submitting this proposal, the prospective contractor certifies the following:

1. The contractor representative who signs below certifies that they have carefully read and understand the provisions of the solicitation and associated documents attached thereto, and hereby submits the attached proposal to perform the work specified therein, all in accordance with the true intent and meaning thereof.
2. The contractor representative further understands and agrees that by signing this certification all of the following information in the certification is true and accurate to the best of their knowledge. If this certification cannot be made unequivocally, a written description of all instances wherein the prospective contractor cannot unequivocally make this certification is provided with this proposal.
3. Prospective Contractor is:
  - Sole Proprietor
  - Partnership
  - Corporation\* if yes, what state? \_\_\_\_\_
  - Joint Venture
  - Other (Specify)
4. Other entities or individuals shall not be allowed to perform work or take contracted-related information or data outside the United States without advance written authorization from the CTAC's Project Manager. All personnel provided for work under this contract, who are not United States citizens, will have executed a valid I-9 form, Employment Eligibility Form, and presented valid employment authorization documents.
5. This proposal is signed by a representative who is authorized to commit the prospective contractor.
6. The entity identified below is the prime contractor.
7. The prospective contractor's insurance carrier(s) can provide insurance certificates as required within ten calendar days following notice of award.
8. The proposed prices have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such process with any other organization or with any competitor.
9. Unless otherwise required by law, the prices proposed have not been knowingly disclosed by the prospective contractor on a prior basis directly or indirectly to any other organization or to any competitor.
10. No attempt has been made, or will be made, by the prospective contractor to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
11. The price and availability of all equipment, materials, and supplies associated with performing the services described, including associated indirect costs and profit, herein have been determined and included in the proposed price. All labor costs, direct and indirect, and profit have been determined and included in the proposed price. The incremental costs expected to be incurred by the CTAC, should it enter into this contract, have also been estimated to the best ability of the prospective contractor. It is understood that the life cycle cost includes the total of the contract price plus the estimated costs to be incurred by the CTAC should it enter into this contract.
12. The prospective contractor can and shall provide the specified performance bond or alternate performance guarantee (if applicable) at no added cost to the CTAC.
13. In submitting its proposal, the prospective contractor agrees not to discuss or otherwise reveal the contents of the proposal to any source outside of the using or contracting CTAC, government or



# Form 1- Prospective Contractor Certification

- private, until after the award of the contract. Prospective contractors not in compliance with this provision may be disqualified, at the option of the CTAC, from contract award. Only discussions authorized in advance and in writing by the contracting CTAC are exempt from this provision.
14. The prospective contractor hereby certifies that it and all of its affiliates collect appropriate taxes and remits them as provided by law.
  15. The prospective contractor certifies that all insurance policies required by this contract shall remain in full force and effect during the entire term of this contract. All insurance policies and any extensions or renewals thereof, shall not be cancelled or amended except with the advance written approval of the CTAC. The Contractor agrees to submit certificates of insurance, which indicate coverage and notice provisions as required by this contract, to the CTAC upon execution of this contract. The insurance certificates shall be subject to approval by the CTAC. The insurance certificates shall include a statement in the certificate that no cancellation of the insurance shall be made without at least thirty calendar days' prior written notice to the CTAC. Approval of the insurance certificates by the CTAC shall not relieve the contractor of any obligation under this contract.
  16. The prospective contractor has read and understands the conditions set forth in this ITN and agrees to them with no exceptions. (If exceptions are taken, attach a written description of each exception to this certification.)
  17. The prospective contractor warrants, represents, and certifies that no elected or appointed official or employee of the CTAC has, or will, personally or indirectly benefit financially or materially from this contract.
  18. In the event any part of this Agreement or work is to be funded by federal, state, or other local agency monies, the Contractor hereby agrees to cooperate with the CTAC in order to assure compliance with all requirements of the funding entity applicable to the use of the monies, including providing access to and the right to examine relevant documents related to the work and as specifically required by the federal or state granting agency, and receiving no payment until all required forms are completed and submitted.
  19. Any contract and/or award arising from this ITN may be terminated for default by the CTAC if it is determined that gratuities of any kind were either offered to, or received by, any of the aforementioned officials or employees, or their close relatives or friends, from the prospective contractor, the prospective contractor's agent(s), representative(s), or employee(s). Any contract and/or award arising from the ITN may also be terminated for default if it is determined that the contract and/or award was obtained by fraud, collusion, conspiracy, or other unlawful means, or if the contract and/or award conflicts with any statutory or Constitutional provision of the State of Florida or of the United States.
  20. Prohibition Against Contingent Fees. The Contractor warrants that it has not employed or retained any company or person other than an employee working solely for the Contractor to solicit and secure this Agreement and that it has not paid or agreed to pay any person, entity, company, or firm any fee, commission, gift, or other consideration contingent upon or resulting from award or making of this Agreement.
  21. Therefore, in compliance with this Invitation to Negotiate, and subject to all conditions herein, the undersigned offers and agrees, that if this proposal is accepted within 90 days from the date of the opening, to furnish the subject services for a Not-to-Exceed Contract Price of \$100,000\_\_\_\_\_.

# Form 1- Prospective Contractor Certification



The following addenda have been received, and considered in the preparation of this proposal:

Invitation to Negotiate (ITN) Addendum

Attachment A: scope of services    Attachment B: Insurance requirement

Attachment C: deliverables

I affirm and certify that: neither I, nor to the best of my knowledge, information, and belief, the entity identified below, or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies has been convicted of, or has had probation before judgment imposed pursuant to criminal proceedings, or has pleaded nolo contendere to a charge of bribery, attempted bribery, or conspiracy to bribe in violation of any state or federal law, except as indicated on the attachment [indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved, and their current positions and responsibilities with the business]:

Prospective Contractor Name: CRL MEDIA LLC

Business Street Address: 120 S. Olive Ave. Suite 704

City, State, & Zip + 4: West Palm Beach, FL 33401

Payment Address (if different): \_\_\_\_\_

Payment City, State, & Zip + 4: \_\_\_\_\_

Federal Employer ID Number: 68-0646152

E-mail Address: info@crlmediaadvertising.com

By: *Claudia R Levy* Title: President  
(Signature)

Name: Claudia R Levy  
(Typed or Printed)

*Unsigned certifications may result in a determination that the proposal is non-responsive.*

# Invitation to Negotiate (ITN) Addendum

Item 12.



**CHILDREN'S TRUST**  
OF ALACHUA COUNTY

## Invitation to Negotiate (ITN) Addendum

6/30/2022

Addendum No.: 2

Invitation to Negotiate: 2022-05

Project Title: Listening Project

Date of Addendum: 6/30/2022

ITN Due date: July 15, 2022 at 3:00 PM ET

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This Addendum No. 2 contains the following Questions

**1. When sharing the results of the project will the youth or their families who engage in the listening project have the opportunity to become part of the larger strategic plan? Will the communities be notified of which recommendations from the listening project are elevated to the strategic plan? In a nutshell I would just like to know how the Childrens Trust will engage in continuing the work beyond the listening project?**

Answer: The results and report from the Listening Project will be shared with the public when the contractor provides project updates to the Board.

The Listening Project will guide the steering committee and feed into the Strategic Plan. It will elevate the voices of the community regarding how the Children's Trust can best serve children based on the resources, strengths, and gaps in services within the county. The Strategic Plan, Listening Project Report, and related Communication Products will be available on the Children's Trust website and will likely also be shared through other communication venues such as: social media, newsletters, press release, etc.

The Listening process, relationships, results, etc. will be used by CTAC's community engagement and communications team to further engage the project's participants.

**2. I would like to know if the application submission is required via mail or in person, printed and how many copies of the application we would need to submit. Additionally, I would like to know if can submit the application via email with an electronic document attached?**

# Invitation to Negotiate (ITN) Addendum

Item 12.

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Answer: Yes, response to the ITN should be emailed to the Trust using the following email: [procurement@childrenstrustofalachuacounty.us](mailto:procurement@childrenstrustofalachuacounty.us). Only one electronic copy is needed. Please remember to sign and submit all with your ITN submission.

This addendum will become part of the Invitation to Negotiate and acknowledgement of its receipt should be submitted with the Invitation to Negotiate response. A signature on this addendum does not substitute for a signature on the original response. The original Invitation to Negotiate document must be signed.

RESPONDER NAME: Claudia Ruiz Levy/ CRL Media LLC

SIGNATURE: *Claudia R Levy*

TITLE: President

DATE: 7/14/22

# Frankel:

## Invitation to Negotiate

**Children's Trust of Alachua County**  
**Invitation to Negotiate - Listening Project**  
RFP Number: 2022-05

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JULY 15, 2022

# : Cover Letter

Hello.

First and foremost, it is a tremendous honor to be considered for such an important mission that will serve the children and families of Alachua County. As a company that's headquartered here in Gainesville and has been part of the community for over 17 years, we are big believers in your mission. And with our long history of working for the county and UF/IFAS, as well as forging deep relationships with county board members, we understand the sensitivities surrounding your project.

Developing winning strategies through diligent, comprehensive research is our core strength. The proprietary research and analysis tools we employ, and the skill of our local team, has proven effective and aligns perfectly for this engagement. We also take pride in our ability to move quickly, jump on opportunities, get results and provide great value to our clients.

The experience we have in this area working with clients across different industries is vast. From community listening to insights gathering to sentiment analysis and more, we will take the pulse of residents from rural and urban populations alike to deliver for Children's Trust of Alachua County. Again, thank you for this exciting opportunity. We look forward to working with you.

Sincerely,



Ryan Frankel

Frankel:

## : Executive Summary

The Children's Trust of Alachua County (CTAC) listening project is a critical component to support the needs of children in our community. All voices will be heard across all nine county municipalities using a comprehensive set of data gathering tools, including Artificial Intelligence, to determine an effective and efficient use of funds. The CTAC is about making a positive impact on the lives of children from birth to 18 years old, and this research will help create it.

## FORMS

### FORM 1 - Prospective Contractor Certification

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1. The contractor representative who signs below certifies that they have carefully read and understand the provisions of the solicitation and associated documents attached thereto, and hereby submits the attached proposal to perform the work specified therein, all in accordance with the true intent and meaning thereof.
2. The contractor representative further understands and agrees that by signing this certification all of the following information in the certification is true and accurate to the best of their knowledge. If this certification cannot be made unequivocally, a written description of all instances wherein the prospective contractor cannot unequivocally make this certification is provided with this proposal.
3. Prospective Contractor is:
  - Sole Proprietor
  - Partnership
  - Corporation\* if yes, what state? Florida
  - Joint Venture
  - Other (Specify)
4. Other entities or individuals shall not be allowed to perform work or take contracted-related information or data outside the United States without advance written authorization from the CTAC's Project Manager. All personnel provided for work under this contract, who are not United States citizens, will have executed a valid I-9 form, Employment Eligibility Form, and presented valid employment authorization documents.
5. This proposal is signed by a representative who is authorized to commit the prospective contractor.
6. The entity identified below is the prime contractor.
7. The prospective contractor's insurance carrier(s) can provide insurance certificates as required within ten calendar days following notice of award.
8. The proposed prices have been arrived at independently, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to such process with any other organization or with any competitor.
9. Unless otherwise required by law, the prices proposed have not been knowingly disclosed by the prospective contractor on a prior basis directly or indirectly to any other organization or to any competitor.
10. No attempt has been made, or will be made, by the prospective contractor to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
11. The price and availability of all equipment, materials, and supplies associated with performing the services described, including associated indirect costs and profit, herein have been determined and included in the proposed price. All labor costs, direct and indirect, and profit have been determined and included in the proposed price. The incremental costs expected to be incurred by the CTAC, should it enter into this contract, have also been estimated to the best ability of the prospective contractor. It is understood that the life cycle cost includes the total of the contract price plus the estimated costs to be incurred by the CTAC should it enter into this contract.
12. The prospective contractor can and shall provide the specified performance bond or alternate performance guarantee (if applicable) at no added cost to the CTAC.
13. In submitting its proposal, the prospective contractor agrees not to discuss or otherwise reveal the contents of the proposal to any source outside of the using or contracting CTAC, government or

private, until after the award of the contract. Prospective contractors not in compliance with this provision may be disqualified, at the option of the CTAC, from contract award. Only discussions authorized in advance and in writing by the contracting CTAC are exempt from this provision.

14. The prospective contractor hereby certifies that it and all of its affiliates collect appropriate taxes and remits them as provided by law.
15. The prospective contractor certifies that all insurance policies required by this contract shall remain in full force and effect during the entire term of this contract. All insurance policies and any extensions or renewals thereof, shall not be cancelled or amended except with the advance written approval of the CTAC. The Contractor agrees to submit certificates of insurance, which indicate coverage and notice provisions as required by this contract, to the CTAC upon execution of this contract. The insurance certificates shall be subject to approval by the CTAC. The insurance certificates shall include a statement in the certificate that no cancellation of the insurance shall be made without at least thirty calendar days' prior written notice to the CTAC. Approval of the insurance certificates by the CTAC shall not relieve the contractor of any obligation under this contract.
16. The prospective contractor has read and understands the conditions set forth in this ITN and agrees to them with no exceptions. (If exceptions are taken, attach a written description of each exception to this certification.)
17. The prospective contractor warrants, represents, and certifies that no elected or appointed official or employee of the CTAC has, or will, personally or indirectly benefit financially or materially from this contract.
18. In the event any part of this Agreement or work is to be funded by federal, state, or other local agency monies, the Contractor hereby agrees to cooperate with the CTAC in order to assure compliance with all requirements of the funding entity applicable to the use of the monies, including providing access to and the right to examine relevant documents related to the work and as specifically required by the federal or state granting agency, and receiving no payment until all required forms are completed and submitted.
19. Any contract and/or award arising from this ITN may be terminated for default by the CTAC if it is determined that gratuities of any kind were either offered to, or received by, any of the aforementioned officials or employees, or their close relatives or friends, from the prospective contractor, the prospective contractor's agent(s), representative(s), or employee(s). Any contract and/or award arising from the ITN may also be terminated for default if it is determined that the contract and/or award was obtained by fraud, collusion, conspiracy, or other unlawful means, or if the contract and/or award conflicts with any statutory or Constitutional provision of the State of Florida or of the United States.
20. Prohibition Against Contingent Fees. The Contractor warrants that it has not employed or retained any company or person other than an employee working solely for the Contractor to solicit and secure this Agreement and that it has not paid or agreed to pay any person, entity, company, or firm any fee, commission, gift, or other consideration contingent upon or resulting from award or making of this Agreement.
21. Therefore, in compliance with this Invitation to Negotiate, and subject to all conditions herein, the undersigned offers and agrees, that if this proposal is accepted within 90 days from the date of the opening, to furnish the subject services for a Not-to-Exceed Contract Price of \$ 88,000.000\_\_\_\_\_.



The following addenda have been received, and considered in the preparation of this proposal:

- Addendum 1
- Addendum 2

I affirm and certify that: neither I, nor to the best of my knowledge, information, and belief, the entity identified below, or any of its officers, directors, partners, or any of its employees directly involved in obtaining or performing contracts with public bodies has been convicted of, or has had probation before judgment imposed pursuant to criminal proceedings, or has pleaded nolo contendere to a charge of bribery, attempted bribery, or conspiracy to bribe in violation of any state or federal law, except as indicated on the attachment [indicate the reasons why the affirmation cannot be given and list any conviction, plea, or imposition of probation before judgment with the date, court, official or administrative body, the sentence or disposition, the name(s) of the person(s) involved, and their current positions and responsibilities with the business]:

Prospective Contractor Name: Frankel Media Group, LLC (DBA Frankel Agency)

Business Street Address: 5001 Celebration Pointe Ave, Suite 520

City, State, & Zip + 4: Gainesville, FL, 32608

Payment Address (if different): Same address as above.

Payment City, State, & Zip + 4: \_\_\_\_\_

Federal Employer ID Number: 20-5957319

E-mail Address: aflanders@frankelagency.com

By:   
(Signature)

Title: President & CEO

Name: Ryan Frankel  
(Typed or Printed)

*Unsigned certifications may result in a determination that the proposal is non-responsive.*

**Section 1**

**: Record of  
Past Experience**

# : Alachua County

## Animal Resources & Care

### Audience Research and Stakeholder Listening Ahead of Marketing Campaign

- **In Depth Interviews**
- **Stakeholder Interviews**
- **Digital Surveys**
  - Adopters
  - Volunteers
- **Marketing Plan Development**

Frankel was hired to support Alachua County Animal Resources & Care (formerly Alachua County Animal Services) by identifying areas of opportunity to effectively build awareness and strengthen perception, primarily amongst potential adopters and those who volunteer with the organization. Before building a campaign, Frankel analyzed existing research and industry trends to uncover valuable target audience characteristics. Then, we conducted primary research inclusive of one-on-one interviews with staff, commissioners and key partners. We also created and sent digital surveys to recent adopters and volunteers to determine what messages stand out, where there may be gaps in knowledge and where they find information - all in an effort to inform a strategic marketing and communications plan for the department.

## Resource Recovery Park - EcoLoop

### Community Research to Inform Branding and Communications Ahead of Park Development

- **Digital Survey Among County Residents**
- **Marketing Plan Development**
- **Individual Interviews**

Frankel has worked with Alachua County Waste Alternatives and Waste Collection for several years conducting research and launching initiatives concerning recycling, trash collection and more. Recently, we developed the name and logo for the new EcoLoop industrial park where companies turn recycled materials into thriving businesses. Through our research with county officials and the general public we uncovered the benefits of the Circular Economy and used those insights for naming and branding purposes.



# ECOLOOP

# : FCL Timber, Land & Cattle

Community Listening Ahead of Real Estate Development

- Digital Survey Among County Residents
- Marketing Plan Development
- Social Media Listening
- Stakeholder Interviews
- Community Hearings

Frankel was retained to represent FCL Timber, Land & Cattle, which owns approximately 4,067 acres of land in Western Alachua County. Our role is to handle client communications, government relations, crisis management and strategy while options are explored for the property's future, which represents billions of dollars in development over the next 20 years. We have also been meeting with the community and conducting ongoing research among local constituents and stakeholders to hear their concerns and better understand the needs of all audiences. This information has helped form strong and effective strategic communications.

Frankel:

## FCL Timber, Land & Cattle, LLLP FCL Special Area Study Report Fact Sheet



### AT A GLANCE

**PROPERTY OWNER**  
FCL Timber, Land & Cattle, LLLP

**PROPERTY LOCATION**  
SW 122nd Street/Parker Road

**PROPERTY SIZE**  
±4,067 Acres

**EXISTING USES**  
Large-scale Silviculture, Pasture and Rangeland

FCL Timber, Land & Cattle, LLLP, a local family-owned entity, which has owned approximately ±4,067 acres of land in western Alachua County since the 1950's, is exploring options for the future of its property. FCL has been working closely with Alachua County on a Special Area Study (SAS) to identify potential future uses for the property. FCL takes great pride in the land and some of the limited partners still reside on site.

The six square-mile study area consists of 14 parcels west of and 12 parcels east of Parker Road, on which agricultural and silvicultural activity has occurred for the past 100 years. FCL maintains the land, its cattle, and silviculture operations. This planning effort is part of a multi-year effort to evaluate short- and long-term plans for the property as a whole.

### QUESTIONS OR COMMENTS? CONTACT OUR TEAM:

**GERRY DEDENBACH, AICP**  
Executive Vice President  
CHW Professional Consultants  
gerryd@chw-inc.com  
(352) 331-1976

**PATRICE BOYES, ESQ.,**  
Land Use Attorney  
Patrice Boyes, P.A.  
pboyes@boyeslaw.com  
(352) 372-2684

**Media Contact:**  
**RYAN FRANKEL**  
Frankel Agency  
ryan@frankelagency.com  
(352) 331-5558



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# : First Solar - Archer Solar Project

Community Listening, Stakeholder Engagement and Strategic Communications

- In Depth Interviews
- Stakeholder Interviews
- Community Hearings
- Social Listening

We were hired to conduct community listening, coordinate community engagement, PR, web and digital reputation monitoring and management for an industrial scale solar project in Alachua. Part of our role was to hear concerns from the community and then work with experts to explain solar energy and its benefits. Then we adapted that information and distributed it to audiences ranging in elementary to advanced understandings - all in an effort to educate the community.

## : Social Media Listening Dashboard

**ARCHER SOLAR DIGITAL MONITORING**

**Top 5 Posters**

USERNAME	ADDRESS	POST
John Duffusa	17121 SW 83rd Ave, Archer FL, ...	5
Tara Quirella	8817 1326th Pl, Archer, FL 32618	1
David A. Sloan	17820 103rd Pl, Archer, FL 32618	1
Jean White	304 Church St, Archer, FL 32618	1
Stacey Swanson Ho	8889 1474th Ave, Archer, FL 32618	1

**Individuals by Address**

**Top 5 Commenters**

USERNAME	ADDRESS	COMMENT
John White	304 Church St, Archer, FL, ...	34
David A. Sloan	17820 103rd Pl, Archer, F., ...	22
Ramona Owens	18442 1388th Ave, Archer, ...	21
Linda Moore	8014 126th St, Archer, FL, ...	19
Laura McMillan	4022 143rd St, Archer, F., ...	16

**Project Overview**

**AT A GLANCE**

- First Solar 74.9MW ac
- 200+ construction jobs
- Ground-Mount PV
- 200 ac construction jobs
- 23,000 ac construction jobs
- 86,000 ac construction jobs
- 31,500 ac construction jobs

**PROJECT BENEFITS**

- Generates 14,000 ac of other power
- Generates 14,000 ac of other power
- Generates 14,000 ac of other power
- Generates 14,000 ac of other power
- Generates 14,000 ac of other power

**ENVIRONMENTAL IMPACT**

Construction starting on the project will include the implementation of appropriate dust control measures, as well as best practices for soil erosion control.

Frankel:

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## : First Solar Educational Toolkit

This comprehensive informational packet was used to educate the public at large and stakeholders about the benefits, the preparation in place and the future positive environmental impact of the solar project.



# : Nutrition Program (SNAP-Ed)

## Audience Research and Community Listening Ahead of Marketing Campaign

- **Target Audience Analysis**
  - Geographic Heat Mapping
  - Age + Demographic Analysis
- **Secondary Research**
  - Audience Motivation Analysis
  - Barriers + Challenges
- **County Focus Groups**
  - Dixie/Gilchrist/Levy
  - Orange
  - Osceola

The Family Nutrition Program, a subsidiary of the University of Florida Institute of Food and Agricultural Sciences (UF/IFAS), asked us to conduct research in rural and urban markets across 5 different counties in order to inform a future campaign promoting healthy eating among SNAP-eligible residents. A strong recruitment approach was important for this research project since we wanted to get a good mixture of qualitative and quantitative data and an even representation of county residents (urban v. rural; male v. female; variety of age ranges). Additionally, we are developing a pilot marketing campaign with test messaging rooted in research to help create better nutritional outcomes.

Frankel:

## Frankel:

5001 Celebration Pointe Ave, Ste 520 Gainesville, FL 32608  
352.331.5558  
info@frankelagency.com  
FrankelAgency.com

### UF/IFAS Snap-Ed Focus Group Moderator Guide

*NOTE: Please keep in mind this won't be read verbatim, it is just a guide to be made conversational and adapted to the interviewee.*

#### Introduction-Explanation of the Project

Hello everyone, I'm Ryan Frankel with Frankel Agency. We are conducting research on behalf of the Family Nutrition Program, a University of Florida IFAS Extension, and the Department of Children and Families. Thank you for taking the time to participate in this focus group.

Simply put, the goal of this research is to learn how to motivate more people to eat more fruits and vegetables. We want to understand what types of fruit and vegetables you currently buy, where you buy them from, how frequently you buy them. Also, if you don't purchase much fruit or vegetables, we want to understand why.

Additionally, we are hoping to uncover what you think would be the best platform for messages about fruits and vegetables to be found (Facebook, Email, TV, Schools, etc.)

During this conversation, we want you to know that we value your honest opinions. We encourage you to speak candidly. Also, we want to encourage you to ask any questions that may arise during the process, at any time.

#### Directions

**We will be recording today's discussion.** Please be assured that all of your responses will be kept confidential. You will not be identified at any point in any report or deliverables, and your statements will remain anonymous.

Before we begin, does anyone have any questions or concerns?

**[Start Recording]**

#### Ice Breaker

To start off, I'd like to go around the group and have everyone introduce themselves.

#### Setting the Stage

As I mentioned before, we're here to understand a little more about the food you buy and how we can convince you in the future to eat more fruits and vegetables (and buy them for your family!) But we don't know what we don't know. Before we make any presumptions or ask any questions, we'd like you to candidly tell us what you think would make you, your friends, and



## : References

### Alachua County EcoLoop

**Name:** Sean McLendon, Strategic Initiatives Manager

**Org:** Alachua County BOCC

**Email:** smclendon@alachuacounty.us

**Mailing Address:** 12 SE 1st St. Gainesville, FL 32601

**Telephone:** 352-548-3765

### Alachua County

**Name:** Gina Peebles, Assistant County Manager - Chief of Staff

**Org:** Alachua County BOCC

**Email:** gpeebles@alachuacounty.us

**Mailing Address:** 12 SE 1st Street • Gainesville • FL • 32601

**Telephone:** 352-337-6279 (office) • 352-538-8265 (mobile)

### FCL Timber, Land & Cattle

**Name:** Patrice Boyes

**Org:** Boyes Law

**Email:** pboyes@boyeslaw.com

**Mailing Address:** 5700 SW 34th St Suite 1120, Gainesville, FL 32608

**Telephone:** (352) 372-2684

### First Solar (Archer Solar Project)

**Name:** Patrice Boyes

**Org:** Boyes Law

**Email:** pboyes@boyeslaw.com

**Mailing Address:** 5700 SW 34th St Suite 1120, Gainesville, FL 32608

**Telephone:** (352) 372-2684

### Nutrition Program (SNAP-Ed)

**Name:** Karla Pagan Shelnett

**Org:** UF IFAS Family Nutrition Program, Associate Professor and Extension Nutrition Specialist

**Email:** kpagan@ufl.edu

**Mailing Address:** UF, Institute of Food + Agricultural Sciences, 3028-A McCarty D, PO Box 110310, Gainesville, FL ZIP

**Telephone:** (352) 273-3535

**Section 2**

**: Project Plan**



# : Our Approach to the Project

Hearing the voices of those who have previously interacted with CTAC or who might have future contact with the organization is critical to the project’s success. We will engage in meaningful conversations across Alachua County’s nine municipalities in order to help build bridges for future engagement and strong future communication.

Achieving that will involve a comprehensive and systematic research effort to ensure all residents have a say. Therefore we will take a qualitative approach designed to capture individual experiences as well as a quantitative approach to yield statistically significant data responses capable of being analyzed by geography or demographic.

It is our aim to identify key themes, trends and common issues from a wide range of people. We want the input of key stakeholders and elevate voices that have not often been heard. We will also facilitate a channel to share opinions on CTAC’s programs and approaches.

Frankel:

Frankel will use a comprehensive suite of data gathering and analytical tools in order to reach all audiences and stakeholders.



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# :Phase 1

*In this phase we will assess the situation, align on our approach, develop the game plan, and hire appropriate 3rd party vendors.*

## **Phase 1: Planning & Secondary Research - 1 MONTH**

### **Assess Market Dynamic**

- Establish a theoretical framework for how we have arrived at this point
- Formulate a hypothesis of what the listening project might uncover

### **Develop + Finalize Project Plan (Refine the Research Approach)**

- Hone in on our audience and define them more specifically
- Evaluate additional staffing needs/3rd party vendors
  - Add research and recruitment specialist to the team
  - Recruit community partner volunteers in Gainesville and surrounding cities; include English, Spanish and Creole-speaking individuals
  - Contract with phone survey organization
- Confirm research incentives being used
- Primary research preparation
  - Create focus group moderator & coding guide
  - Survey tool development

### **Document + Data Review**

- Community needs assessments
  - UF Health
  - UF HealthStreet
  - Alachua County - WellFlorida
  - Alachua County Health Department
  - School Board of Alachua County
- Peer reviewed research review

### **Observation + Preliminary Research**

- Stakeholder & board interviews to determine future state and goals of the Alachua County Children's Trust and confirm assessment measures
- Develop framework for assessing key priorities
- Set up social listening + sentiment dashboard
  - Key phrases to track
  - Key accounts to follow

# :Phase 2

*This phase is the longest of the engagement and focuses on information gathering through a wide range of tactics intended to reach specific audiences.*

## **Phase 2: Data Collection (Remote, Phone + In Person) - 4 MONTHS**

### **In-Depth Interviews**

- Recruitment through 1:1 outreach
- Board members, key informants
- Phone/Zoom

### **Oral Histories With:**

- Those who helped establish CTAC and set up the initial campaign
- Long-standing partners + program participants

### **Focus Groups (In Person + Via Zoom)**

- Recruit using panel service to ensure response rate and demographic mix of parents and caregivers
- Use AI data to read participant sentiment on Zoom focus groups
- In person for audiences without internet access

### **Conduct Intercept Surveys at Community Events**

#### **County-wide Phone Surveys**

- Recruitment through UF Survey Research Center to achieve representative sample of urban and rural, etc.

#### **County-wide Digital Surveys**

- Recruitment through provided list by CTAC or panel service for broad representation of urban and rural, etc

#### **Online Tracking**

- Place cookies on CTAC and partner webpages to track consumer journey through website content

#### **Social Media Listening**

- Sentiment analysis
- Key themes + commentary
- Identification of supporters and opponents

#### **Quality Control/Validity**

- Variety of data collection points includes:
  - All audiences can be reached
  - All geographics within the county can be reached
- Ensure accessibility and inclusion
- Ensure key questions are asked of each group
- Ensure proper documentation of findings

# :Audiences By Tactics

*The following is a breakdown of audiences we need to reach and tools we will employ to reach them. Our goal is to use tactics appropriate for meeting each audience where they are.*

## **Parents + Caregivers:**

- In Person and/or Zoom Focus Groups
- Digital Surveys
- Intercept Surveys
- Social Media Monitoring
- County-Wide Phone Surveys\*

## **Children\*:**

- In Person and/or Zoom Focus Groups
- Intercept Surveys

## **Service Providers (Current + Potential):**

- Digital Surveys

## **Partners (Current + Potential):**

- Digital Surveys
- Online Tracking
- Oral Histories

## **Key Informants (Community Leaders, Pediatricians, Faith Groups, Etc.):**

- In Depth Zoom and/or Phone Interviews
- Oral Histories

*\*Phone surveys will only be conducted if participation through the digital and intercept surveys is low*

# : Audiences By Tactics

## Participant Recruitment

Careful consideration has been given to how to best recruit each audience to ensure a strong methodological approach, yield a representative sample, and ensure ease of participation.

- Audiences composed of a finite list of people with busy schedules (e.g. key informants) will be contacted individually to talk during a time that would be convenient for them.
- Parents and caregivers will be reached through a number of avenues. They will be comprehensively contacted via telephone interviews, focus groups, and digital and intercept surveys.
- Recruitment for focus groups will take place through community partners (e.g., Partnership for Strong Families, Boys + Girls Club).
- Digital survey participation will be through Facebook recruitment, or through an email list that the CTAC provides, a voter registration list, or a panel service\* (if a list is not available).
- Intercept surveys will reach this audience directly when they drop off/pick children up from school or after-school programs or at other community events. Intercept surveys will be kept short to encourage response.
- For time and cost efficiency, Zoom focus groups will be utilized. For audiences that do not have access to technology and the Internet (e.g., rural areas of the county), we will hold our focus groups in person.
- Partners and service providers will be reached by digital survey since they have an existing relationship and are more likely to respond.
- Children\*\* under the age of 18 years old account for approximately 20% of the Alachua County population. Broken into age group bands, this audience will be reached via school and after-school partner programs to ensure parents have visibility and are able to provide consent.

*We recommend incentives be used to encourage participation; every focus group participant should receive an incentive for their time. For cost efficiencies, participants in phone interviews, intercept interviews and digital surveys should be entered to win an incentive.*

*\*The questions asked of children would be designed to assess the needs and areas of opportunity for CTAC. Zoom would only be used for high-school-aged children who have written parental permission. Otherwise, all intercept surveys and focus groups would be conducted in person, with appropriate oversight.*

*\*\*Panel services will be enlisted and phone interviews will be conducted if there is a lower than anticipated participation rate. Costs for these services are not included in the Pricing section as they are a contingency option.*

# : Phase 3 & 4

*Here, we will compile and sort through all gathered data, analyze it and develop clear, cohesive next steps.*

## **Phase 3: Analysis - 2 MONTHS**

### **Preliminary Data Processing + Analysis**

#### **Oral Histories**

- Recordings\* and/or notes

#### **Interview Notes**

- Coded + summarized
- Key themes identified

#### **Focus Groups**

- Coded + summarized
- Key themes identified

### **Intercept Survey Analysis + Reporting**

### **Digital Survey Analysis + Reporting**

### **Phone Survey Analysis + Reporting**

### **Needs + Gap Analysis**

## **Phase 4: Next steps for strategic communications - 1 MONTH**

*In this phase we will communicate our findings through a comprehensive presentation with recommendations.*

### **Develop Board Presentation**

- Overview of listening project
- Analysis of findings
- Key themes + what they mean
- Inclusive of charts/graphs to digest data set

### **Recommend a Course of Action for Strategic Communications**

### **Package Raw Notes and Files from Data Collection Sources**

\*Recordings provided if participant allows us to record

# : Leadership Resumes



**Ryan Frankel**  
President & CEO

With an endless imagination, inherent skill for marketing and an intense passion for each client's success, Ryan's the big-picture guy with an emphasis on creating big ideas to grow great brands. No matter what the challenge or circumstance happens to be, he guides clients through it.

Ryan lives and breathes creativity and brand development, using a lifetime of business experience to create campaigns, strategies and communications for a wide range of organizations including Mack Trucks, Nextran Corporation, REV Group, E-ONE, Hospital Corporation of America (HCA), University of Florida, Florida State University, and many others.



**Ashleigh Flanders**  
Vice President

Ashleigh, who holds a Ph.D from the University of London, brings many years of marketing and advertising management experience to the Frankel team, with the bulk of those years being in the agency world. In the past two years alone, she has worked closely with several Frankel clients responding quickly to manage crisis situations brought on by COVID; helping them to adjust their business models to successfully navigate economic uncertainty.

Her work creating and executing fully-integrated campaigns designed to build memorable brands and deliver a strong return on investment has been acknowledged with multiple FPRA Image and ADDY awards. Notable client experiences include: Kellogg's, Hendrick's Gin, Lexus, Pure Barre, and Gold's Gym.

# : Staff Resumes

The Frankel Team servicing the CTAC’s project is composed of research experts with previous experience on Alachua County initiatives. Their hours are carefully considered to ensure costs are kept manageable.

## Megan MacPherson

Senior Brand Manager and Research Strategy Lead



**EDUCATION**  
B.A. in Business Administration  
University of Florida

**:Responsibilities**

Strategy, planning, questionnaire writing, analysis and reporting

**:Experience**

- Senior Brand Manager, Frankel
- Associate Director of Communications, UF Clinical & Translational Science Institute
- Communications Manager, UF College of Medicine
- Communications Director, Interdisciplinary Center for Biotechnology Research & Genetics Institute
- Referral Coordinator, UF College of Veterinary Medicine
- Marketing Assistant, Fetching Communications
- Account Director, 352 INC.
- Project Manager & Traffic Manager, 352 INC.

## Julia Slawek

Project Manager



**EDUCATION**  
B.A. in PR & Advertising  
UNC Chapel Hill  
B.A. Women and Gender Studies

**:Responsibilities**

Project timeline creation, scheduling and reporting

**:Experience**

- Project Manager, Frankel
- Account Manager, Liquid Creative
- Account Support Intern, 3 Birds Marketing
- Account Management Intern, Cramer-Krasselt
- Ticket Services Coordinator, Carolina Performing Arts

## Katrina Alber

Social Media Manager



**EDUCATION**  
B.S. in Political Science  
Florida State University

**:Responsibilities**

Social listening setup and management, analysis and recommendations

**:Experience**

- Social Media Manager, Frankel
- Development Director, Arthritis Foundation
- Sales Manager/Associate Director, Keiser University
- Senior Sales Counselor, Keiser University
- Sales Counselor, Keiser University

## Nick Frye

Digital Marketing Specialist



**EDUCATION**  
BBA, Business Management  
Colorado Mesa University

**:Responsibilities**

Digital survey programming and distribution

**:Experience**

- Digital Marketing Specialist: Frankel
- Digital Advertising Specialist: McFadden/Gavender Advertising
- Administrative Assistant: Advance Title Company



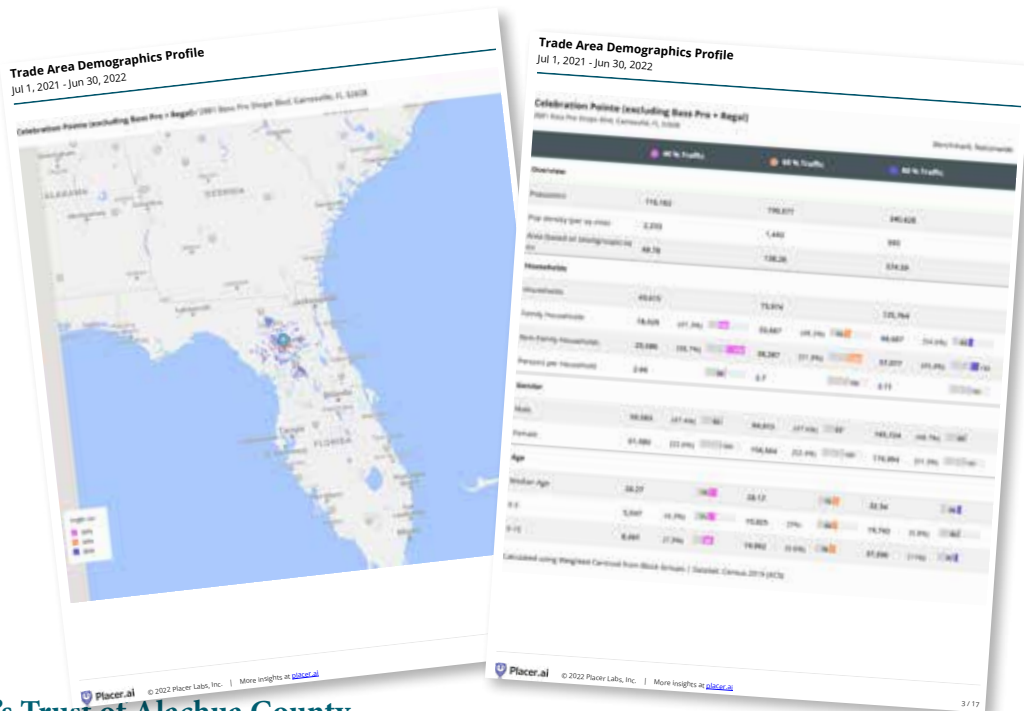
# : Sample Data Collection Tools

## AI with Zoom Focus Groups



Frankel:

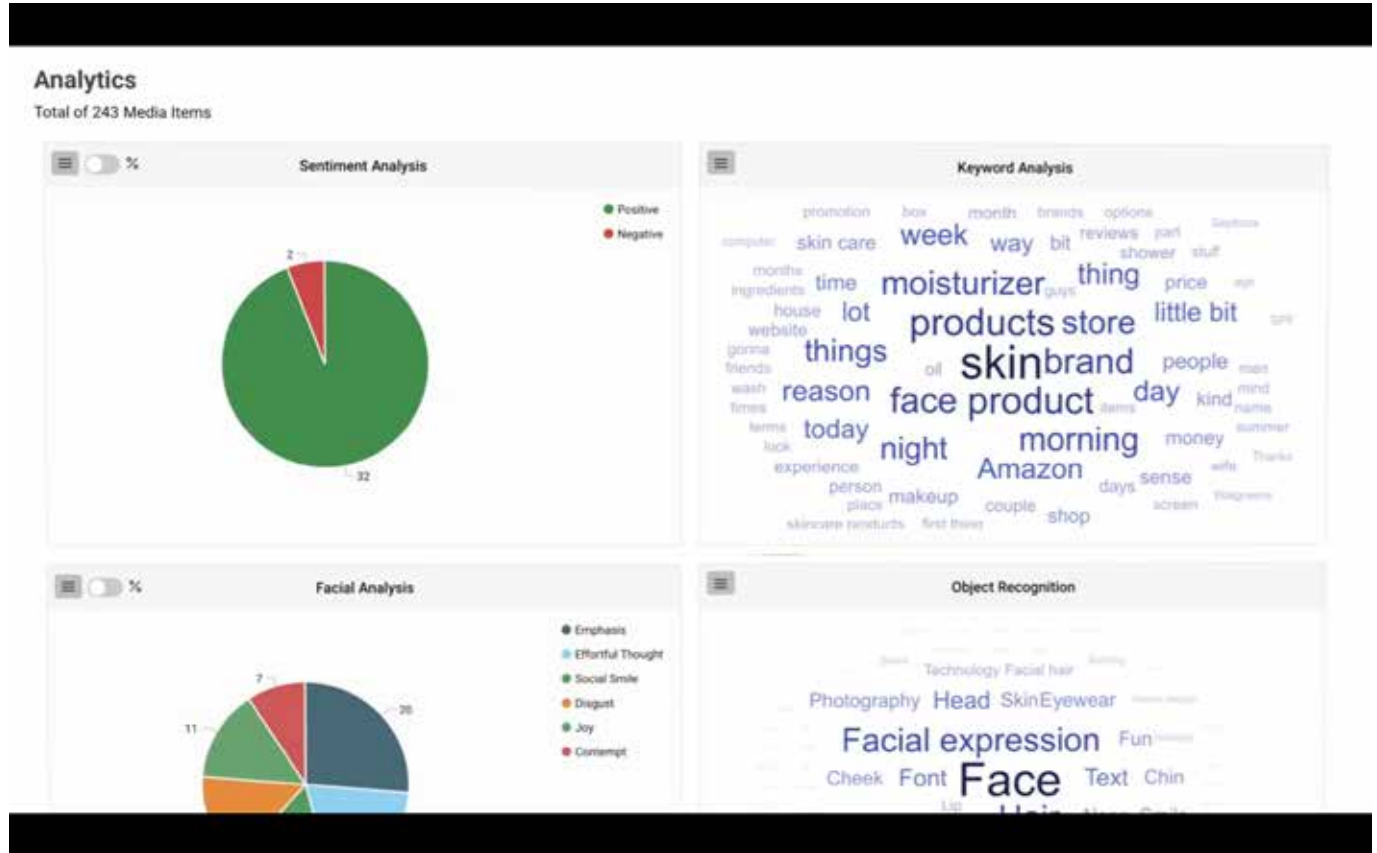
## Audience Segmentation Data Via Placer.AI



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# : Sample Data Collection Tools

## Social Media Listening Dashboard



Frankel:



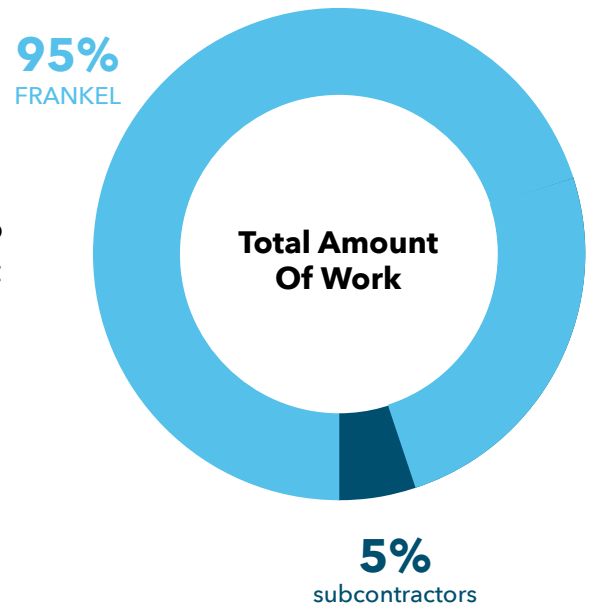
**Section 3**

**: Subcontracting**

## : Subcontracting

The vast majority of the work, 95%, will be performed by current Frankel employees, headquartered in Gainesville, Florida. The other 5% will be subcontracted resources. We intend to partner with a research and recruitment specialist (consultant) and a phone survey researcher in subcontracted roles.

*None of the work will be performed out of the United States.*



## : Subcontractor Profiles

### Elizabeth Flood-Grady Ph.D

**About:** Visiting Assistant Professor, STEM Translational Communication Center Manager, Clinical Translational Science Institute Recruitment Center (UF College of Journalism). An interdisciplinary, mixed-methods, health communication scientist who studies translational health communication in clinical, online, and family decision-making contexts.

**Role:** Research recruitment, message development and compliance advisor. Will provide guidance on question design and overall methodological approach.

### Perks:

- Local to Alachua County
- Strong qualitative and quantitative research background
- Expert in strategic message design for research participation and recruitment
- Expert in recruitment of research participants, particularly on digital platforms (Email, social media, etc.)

# : Subcontractor Profiles

## UF Survey Research Center

**About:** One of the largest university-based survey programs in the country and one of only two currently accredited by the National Center for Quality Assurance for conducting HEDIS health care surveys. The UFSRC is also a member of the Association of Academic Survey Research Organizations.

**Project Role:** Conduct telephone surveys among local constituents to ensure broad audience participation in the listening project

### Perks:

- Local to Alachua County
- Record Calls for Quality Control + Data Collection: Use a state-of-the-art voice-over-Internet protocol (VOIP) telephone system that uses Asterisk open source technology. This allows them to record 100% of the phone calls for quality and control purposes.
- Speedy Data Capture: 200+ interviewers on staff, with 20-30% fluent in Spanish and English. Open 7 days a week, 9a-9p.
- Strong Answer and Call-Back Rates: Use a toll-free phone number in place for more than a decade (1-888-536-2434) and rings straight to the supervisor desk. Incoming calls can be quickly turned over to an interviewer to conduct the appropriate interview for a particular study (even if the caller doesn't remember the survey name, any sample phone number can be looked up in our Scheduler software).
- Guaranteed Productivity: Project managers can directly access and edit survey sample, specifications, and questionnaires to determine survey productivity and identify the status of particular projects.

*This subcontractor will only be used if phone surveys are needed as a result of lower than anticipated participation in the digital and intercept surveys.*



**Memorandum of Understanding**

**THIS MEMORANDUM OF UNDERSTANDING** (the “Document”) made as of this 15th day of July, 2022 (the “Execution Date”),

**BETWEEN:**

Frankel Media Group, LLC, DBA Frankel of 5001 Celebration Pointe Ave, Ste 520, Gainesville, FL 32608

(the “Client”)

- AND -

Elizabeth Flood-Grady, Ph.D. of 2042 Weimer, College of Journalism, University of Florida, Gainesville, FL 32611

(the “Contractor”)

**BACKGROUND:**

- A. The Contractor is available for hire to perform certain services.
- B. The Client wishes to hire the Contractor to perform services.

This Document will establish the basic terms used in a future service agreement between the Contractor and the Client. The terms contained in this Document are not comprehensive and it is expected that additional terms may be added, and existing terms may be changed or deleted. The basic terms are as follows:

**Non-Binding**

- 1. This Document does not create a binding agreement between the Client and the Contractor and will not be enforceable. Only the future service agreement, duly executed by the Client and the Contractor, will be enforceable. The terms and conditions of the future service agreement will supersede any terms and conditions contained in this Document. The Client and the Contractor are not prevented from entering into negotiations with third parties with regard to the subject matter of this Document.

**Transaction Description**

- 2. The Services for hire are described as follows:

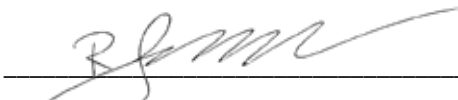
p. 352.331.5558 | 5001 Celebration Pointe Ave | Ste 520 | Gainesville, FL 32608 | [frankelagency.com](http://frankelagency.com)

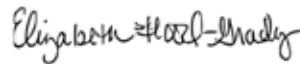
- Research consultancy, review of the questionnaire, methodological guidance, and recommendations on recruitment strategy for Children’s Trust of Alachua County Listening project.

**Purchase Price**

3. The Contractor will charge the Client a flat fee of \$8,750 USD for the services (the “Compensation”).
4. The Client will pay to the Contractor the deposit amount of \$4,375 USD (the “Deposit”) on or before the 15th day of August, 2022 (the “Deposit Date”).
5. The Client will pay the to The Contractor the balance amount of \$4,375 USD on or before the 19th day of December, 2022 (the “Closing Date”) as final payment in full for the services.

This Document accurately reflects the understanding between the Contractor and the Client, signed on this 15th day of July, 2022.

Per:  (Seal)  
Frankel Media Group, LLC, DBA Frankel (Client)



\_\_\_\_\_  
Elizabeth Flood-Grady, Ph.D. (Contractor)

Frankel:

frankelagency.com



Frankel:

**Section 4**  
**: Price**

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# : Price Breakdown

## Personnel Costs

- Job Titles: President and Vice President, Brand Manager + Research Lead, Project Manager, Social Media Manager, Digital Marketing Specialist
- Hourly Rate (Blended)
  - \$185/hr
- Total Hours: 188
- Personnel Costs: \$34,780

## Travel Expenses

- Mileage from Frankel HQ to each focus group location (round trip)
  - *Estimated at 300 miles @ \$.585*
- Total Travel: \$175.50

## Other Costs

- Social Advertising for Digital Survey Recruitment = \$2,500
- Focus Group Participant Incentives
  - *Focus Groups (\$50 pp, 10 ppl per group, 18 groups in total) = \$9,000*
  - *Digital Surveys (Enter to Win Drawing for \$500)*
- Tech Fees
  - *AI for Focus Group Theme and Sentiment Analysis = \$15,000*
  - *Social Listening + Sentiment Dashboard = \$2,500/month for 4 months = \$10,000*
  - *Audience Segmentation via Placer.AI = \$5,000*
- Research Consultant Subcontractor = \$2,200/month for 5 months = \$11,000

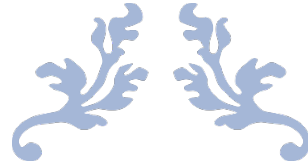
**FINAL FIXED PRICE = \$88,000**

Frankel:

# : Thank You

Ashleigh Flanders, Vice President  
aflanders@frankelagency.com  
(352) 331-5558

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# THE REFLEXIVE LISTENING PROJECT

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For the CTAC Listening Project



JULY 15, 2022

VALENTINE CONSULTING LLC DBA "THE VARIABLE SCOOP"  
[www.variablescoop.com](http://www.variablescoop.com)

## **Executive Summary**

Valentine Consulting LLC (VC) proposes to work with the Children’s Trust of Alachua County (CTAC) in developing and implementing the Reflexive Listening Project, a forum for community stakeholders to have their lived experience inform the strategies and investments of the Trust.

The Reflexive Listening Project is founded by community members playing a central role at every step. The activities of this project include the development of an advisory committee to guide the project, receive insight into the business and service provider community through focus, and hear the community's voices through coordinated listening sessions and an in-person or online survey.

## About Valentine Consulting LLC

Dawn Valentine (she/her/WE) is the founder of Valentine Consulting LLC dba “The Variable Scoop,” an independent strategic planning and evaluation firm. We use an asset-based approach to framing a strategic plan and developing a theory of change.

An asset-based approach builds on the assets found in the community. It mobilizes individuals, families, nonprofits, and institutions to come together, becoming aware of how they are interconnected and the strength of those connections and assets. Asset-based approaches differ from deficit ones focusing solely on identifying and servicing needs.

Our ambition is to support the proliferation of inclusive, bottom-up community transformation. We aim to achieve this by offering our tools to build organizational capacity; improve community community-based programs that are citizen-led; enable community members to take action or take accountability; or identify and connect people to assets. We believe people are not problems to be solved, and communities thrive with increasing interdependence in their community.

We accomplish this work through strategic partnerships. For this invitation to negotiate, Dawn Valentine will partner with Allison Shurilla (she/they), founder and Lead Consultant of AS Community Consulting.

## Project Plan

Valentine Consulting LLC (VC) proposes to work with the Children’s Trust of Alachua County (CTAC) in developing and implementing the Reflexive Listening Project, a forum for community stakeholders to have their lived experience inform the strategies and investments of the Trust. The overarching goal of this project is to activate discussions about positive youth development: what is missing, what needs to be done and who has the capacity to do it. In this capacity VC aims to maintain the spirit of Fran Peavey, a revolutionary advocate of change who sat on park benches across the world with a sign that simply read “American Willing to Listen”. Her simple actions taught organizers and peace activists across the world that simple conversations bring issues to life in the minds and hearts of those being interviewed and generate change not by telling but by listening. Additionally, listening projects simultaneously discover or reveal community concerns and people who want to do something about them.

In response to this invitation to negotiate, VC will engage residents of Alachua County. The Reflexive Listening Project is founded community members playing a central role in this project, not just as focus group members, listening circle or survey participants, but also serving on the project advisory board, by helping to structure and conduct the focus groups, playing a role in the creation, revision, and administration of the survey, and making meaningful recommendations on data interpretation. The activities of this project include: the development of an advisory committee to guide the project, receive insight in the business and service provider community through focus, to hear the voices of the community through coordinated listening sessions and an in-person or online survey. Specifically, the goals for the listening project are:

- Identify key community problems, issues, and priorities for positive youth development of children in the county.
- Recruit stakeholders and organizations to include often unheard or unheeded voices (e.g. voices from youth in transition, voices from youth returning from detention, youth or the parents of youth with a disability and grandparents who have become the primary caregiver, etc.)
- Generate generative conversations designed to build empathy, understanding and common ground among people with different or conflicting views.
- Generate creative solutions among parents, service providers, youth and other stakeholders.
- Encourage the development of new community leaders for uncommon coalitions and alliances.
- Create recommendations that encourage the CTAC to build long-term capacity for collaborative community action that incorporates the issues and priorities of parents, grandparents, child advocates and local activists.

### Advisory Committee

Valentine Consulting is not a known organization in Alachua County, and we view this as an opportunity for partnerships with CTAC, its current grantees as well as community stakeholders who invested in the mission of CTAC.

Our process begins with recruitment for an Advisory Committee. We will begin by engaging staff as well as previous stakeholders of the CTAC, people such as Sunshine Moss (education consultant and parent

advocate), Chanae Jackson, Community-Based Researcher, Dr. Diedre F Houchen, Manager, Equity & Community Outreach at Alachua County as well as founding member and co-organizer of the Black Parent Support Network. Prior grantees of CTAC such as Christi Arrington from Girls Place, Jonathan Leslie from Project Youth Build, or care coordinators from Help Me Grow and dentists from the Saving Smiles Oral Health Program. We also would like to reach out to government officials such as Sheriff Clovis Watson Jr or members of his staff who oversee the Teen Court or Veita Jackson-Carter who works with the Teenage Parent Program (TAP). Community members such as Bishop Stokes, Executive Director of Willie Mae Stokes Community Center or staff from the Hawthorne Area Resource Center. From these types of stakeholders we would ask them to invite parents and youth to become part of the Reflective Listening Project.

The initial recruitment process is also the very first data collection point. These conversations will not be recorded but detailed notes will be maintained. These informal discussions often lead the individual to insights about the community and perceived needs of the Trust as well as community assets. The notes are then formalized into a stakeholder map which will help the VC program staff determine the best way to engage their interest and develop strategies around their availability, interests, and level of community influence.

These diverse groups of stakeholders who would become the Advisory Committee would be compensated for their time with a small stipend. One purpose for the Advisory Committee members is to act as a guide to ensure the VC program staff are working with (rather than working 'on') communities throughout the county. Another purpose is the ability to lean into the lived experiences and community expertise to ensure outreach, training, tools and recommendations are culturally competent. There is an expectation some members of the committee will support the cultivation of networks and relationships and while other members of the committee will support the making of the final data analysis and craft recommendations to CTAC.

The advisory committee will add to this Reflexive Listening Project by:

- Ensuring connections are more meaningful, respectful, and built on trust.
- Certify our activities are culturally and linguistically appropriate.
- Providing a foundation of trust adds credibility to the final product.
- Potentially become a sustainable alliance for CTAC to maintain relationships with caregivers, parents, service providers and youth.

### **Focus Groups**

Utilizing CTAC 4 priorities: all children are born healthy and remain healthy, : all children can learn what they need to be successful, all children have nurturing, supportive caregivers and relationships and all children live in a safe community. We will work with the advisory committee to develop a list of known businesses owners (i.e. licensed daycare providers or 21st Century After School Programs), services providers (i.e. members of ACSNC, Pediatrics and Primary Care Doctors, care management staff, social workers, work-force development program staff, etc.), and parent groups (i.e. PTA programs in schools, Alachua County Parent Support Group for children with special needs, faith-based organizations).

Our initial ask is not if these organizations want to participate in a focus group but if they wish to facilitate a focus group. By engaging the community in this way there is a natural opportunity to develop



one strong focus group protocol and script for everyone to follow. It is also a community empowerment tool that will increase the number of focus groups, increase the number of participants because there are more opportunities to ensure the focus groups occur at optimal times and places that are best suited to the participants. For those organizations who want to have a focus group but cannot facilitate them, VC will facilitate those groups or train other community members who expressed interest in the Reflexive Listening Project to facilitate on the program's behalf. These focus groups will also act as a lever to introduce the project to local community places as the remaining focus groups would be held in public community spaces such as community libraries or the Suwannee River Area Health Education Center.

All of the focus groups will follow a structure of completing a demographic survey, an informed consent statement, the focus group itself will be audio recorded and participants as well as facilitators will be compensated for their time. The data will be analyzed using content analysis. Which includes coding, categorizing (creating meaningful categories into which the units of analysis – words, phrases, sentences etc.), comparing (categories and making links between them). VC will invite members of the advisory board as well as members of CTAC who are not involved in the advisory board to help draw conclusions. The conclusions will then be utilized to frame discussions for the listening circles, survey development and feedback to CTAC and CTAC's strategic planning team.

### **Listening Circles**

Listening circles (or sharing circles) are a form of dialogue inspired by Indigenous populations. These practices have many different names and variations. The common theme in utilizing circles is deep listening through the sharing of stories. The focus of a circle is on the dialogue where people in the circle are exploring each other's circles and learning together. While we will have an agenda based on the findings from the focus group the goal is not to get somewhere but to receive the stories of success, needs, or barriers in promoting positive youth development through the eyes of a parent, a stakeholder, a youth, or a community member.

Circles offer exploration into generative conversation because circles provide people with an opportunity to speak and listen to each other in an atmosphere of safety, decorum, and equality. They are grounded in the participants' experience of what is, which considers feelings, experiences and things that are truly important to the person speaking. Data collection from circles occurs differently. Like the focus groups, circle participants will need to complete a demographic survey and informed consent. Unlike the focus groups there is not a recording, instead two circle keepers or circle facilitators are present in each circle both will take notes throughout the process and at the end of each circle the participants will determine what will be shared with VC for the Reflexive Listening Project.

Recruitment for the listening circles will become part of a larger social media campaign using Eventbrite, Facebook and tick tock ads as well as requesting support from organizations who hosted focus groups and the advisory committee. Listening circles will be offered for communities by geography and in locations such as Alachua, Archer, Micanopy, Hawthorne, Newberry, High Springs, Lacrosse, Waldo and throughout the city of Gainesville. They will also be offered by type of community, for example circles for teens, parents of children with disabilities, youth who have been in juvenile detention and other unifying community themes as advised by the advisory committee. Circles will be offered in person and virtually. Participants of circles will be offered a small stipend. Once a participant has sat in circle, they

will be offered the opportunity to become part of the data party for analysis or to become a co-circle keeper.

Data generated from listening circles will be analyzed using grounded theory because we want to preserve the complexity of context and avoid pre-determined theory. “Grounded theory starts with data, which are then analyzed and reviewed to enable the theory to be generated from them; it is rooted in the data and little else” (Cohen, Manion and Morrison 2007: 492). Due to the complexity of grounded theory certain parts such as coding data, analyzing data, writing memos and diagrams will be left to program staff and potential advisory committee members who have experience with grounded theory. Generating theory will be done by inviting back people who participated in the listening circle, members of the advisory committee as well as members who participated in the focus groups. The conclusions will be shared with the CTAC CTAC’s strategic planning team.

### Survey

The survey is an opportunity to quantitatively understand the problems members of the community are experiencing. The survey will run concurrently with the listening circles and the questions are based on the findings of the focus groups.

The goal is to distill the focus groups responses into broad categories with introductory questions which as if there was a problem in a certain category with a binary response (yes or no) which leads to an open-ended question like “what problem did you have” and a follow up question with specific checkboxes. For example

*In the last three years, have you had children in your care? Yes/no*

*In that time have you had problems with child custody or child support? Yes/no*

*What problems did you have?*

*Did you have any of these additional problems (only the problems the person has not named are read)*

#### *Child Support*

- *Other parent will not pay child support*
- *You do not know how to get the support you are owed*
- *The child support obligation is more than you could afford?*
- *Unable to prove paternity*
- *Unable to agree on the amount of child support?*

#### *Child custody*

- *Disagreement over child custody*
- *Disagreement over child visitation*
- *Difficulty agreeing to major decisions about the children (i.e. school, religion, travel, etc.)*

#### *Other*

- *Caring for grandchildren or other relatives who are under 18*
- *Under investigation by child protective services*

The survey will ask parents or caregivers about a variety of problems without characterizing them as parenting or youth problems. The reason for this was twofold. First, many people have serious problems that preoccupy them, but if asked would not consider them to be a parenting problem or susceptible to resolution by community programs. Second, as people who are engaged in the space of promoting positive youth, we naturally tend to view the world and problems through our own position. The survey will go through a pilot test with a minimum of ten people to improve and refine the survey questions, responses and flow.

The survey will be administered in person, at health clinics, pre-schools, community fairs, grocery stores, public parks near playgrounds, laundromats, apartment buildings, places of worship, PTA meetings, rehabilitation centers, shelter (homeless and domestic violence), etc. Survey administration will be done by people in communities, data collection will be incentivized with a stipend for the return of every ten surveys completed. For people who want to complete the survey on their own, community surveyors will have cards with a QR code that can take people to a mobile ready website with the survey. For people who choose to leave their name and contact information they will be entered into a raffle for a \$50 or \$100 gift card.

To ensure the reliability of the data collection effort, program staff will utilize connections with University of Florida and Santa Fe College to recruit students and network connections with community members through the advisory board and CTAC grantees. These individuals will be trained on standard field research procedures. The challenges with this type of data collection are the respondents may not assure widespread representation among the different subgroups throughout the county.

For members who hear about the Reflexive Listening Project and are unable to attend a listening circle and are unable to complete a survey they will be invited to make a comment on a community phone line. The community phone line is simply an answering machine where people will have up to ten minutes to make a comment about the CTAC, concerns with youth development in the county or just want to share the barriers their family is facing which prevents them from supporting the development of their child. People will have the ability to leave their information for continued conversations. The phone number will be attached to the same card as the QR code and will also be attached to the social media campaigns for the listening circles.

The data from both the survey and the community comment line will be descriptive in nature and comments will be coded using content analysis. Stakeholders who are interested in interpreting the findings will be invited to a data party. A data party is a process that teaches the community about data distribution for the survey data – specifically how data is distributed relative to the mean. We also work together to place meaning back into the data and offer conclusions as to what a finding could indicate. For example, increased utilization of food banks could be related to the COVID pandemic and a loss of community WIC sites. Placing the data back in context will improve the reporting back to CTAC

### **Interpretation and Dissemination plan**

The conclusion of data analysis for the project will largely occur with VC program staff and input with the Advisory Committee. This is a comfortable step because the community has been engaged in data interpretation at each step. The final interpretations will be presented to the advisory committee, as well as people who participated in the process will be invited to a presentation on the final results. They will also be invited to craft language around what are the recommendations for programming and

community investment from CTAC. Overall, this step both re-engages the community and creates accountability for CTAC on adopting or rejecting a recommendation in the final strategic plan.

Working with CTAC we will develop a plan to disseminate this information more formally to the Board and the Office of the County Commissioner if needed.

The final products to CTAC will be a copy of the presentation, a written report detailing the tools and procedures of the project, copies of the audio recordings and their associated transcripts, with approved notes from the Listening Circles and results of the survey.

## Record of Past Experience

### Dawn's Past Experience of Co-Learning with Community

Dawn's first primary research study was at Children's National Medical Center (CNMC). She started as a Research Assistant collecting data from young mothers who had preschool children with lived experience with violence—sitting with over two hundred women, playing with their children, and documenting their experiences with a survey that brought the data to life. Graduate studies in Epidemiology at George Washington taught understanding the world's health status is the totality of facts. In advancing to Program Coordinator and analyzing the data from the study, the stories encouraged opportunities to take a closer look at the outliers and not to disregard them to make a model work.

As the project with CNMC wound down, there was a desire to bring the stories and the community into research. A new opportunity at Johns Hopkins became available as a Program Director to manage a home safety study that had a participatory approach. There were challenges with this study because most of the research team thought of the community as a complex mass of needs and problems. Working with community health workers and walking through neighborhoods that had been foreign taught her the gift of humanity. During the pilot study knocking on doors again, the stories would return. This time she used their stories to understand a diverse and capable web of gifts and assets in the community. People who had shown commitment and leadership in the past began to emerge from the stories. These community leaders became a core group willing to support the Home Safety Study because of how we engaged them. They became motivated to use their strengths and gift to open a network of other relationships in the community. This core group became the people who would help get the message out and helped to refine the study message and the study protocol to become more inclusive to the community.

Working in partnership with a city health department on an ethnographic study on the transmission of HIV among men who have sex with men (MSM), Dawn learned just how important it is to engage the broader community as actors, not just the recipients of the services. The county invested heavily in developing a community health center where people could come in for testing and services. The staff all received culturally competent training. The communication strategy was LGBTQ inclusive, yet no one went to the clinic. Eighteen months later, the city needed to understand why. For two weeks, Dawn and another community researcher visited the community each day, engaged in community conversations and staff conversations, and conducted two focus groups with men who identified as MSM. At the end of the research period, Dawn and the rest of the research team learned the site selection for the clinic was poor. The clinic was in the middle of a deeply religious community, and the stigma around the clinic being LGBTQ-friendly made it uncomfortable for residents who needed those services to utilize them.

In primary research and evaluation, there is always a need to identify stakeholders. Working in public health stakeholders' groups often includes convening "the usual suspects," and other stakeholders in the community are often left out. One way to avoid this is by utilizing a stakeholder map to identify people with a passion for the issue and people with positions related to addressing the issue at hand. Using a map helps determine who can help influence or advocate for the issue at hand and who is a connector to other community members. By understanding who is showing up, everyone can collaborate. Everyone may not be invited to the leadership team or the core group; there is still another

opportunity in other aspects of the work that is still meaningful. This strategy was particularly useful in understanding who was engaged in the DC Tobacco Free Coalition and equally helpful in understanding which stakeholders could help advocate for Sexual Assault Prevention efforts throughout the District of Columbia.

Not all strategies go as planned. Some seem to go wrong only to end up as life-changing lessons. As an evaluator, Dawn has conducted hundreds of focus groups, developed probably a hundred surveys, and presented the results to as many stakeholders. The project that did not go well involved a community research project involving 20 key informant interviews and ten focus groups with very targeted questions regarding youth in transition. The initial report was presented to a tiny group of community stakeholders, and it did not go well. The hour-long meeting turned into four. The first hour recognized that there was not enough asking and inviting key community members. The government agency had predetermined the list of community members, the questions, and the theme. Dawn's agreement meant we had failed to ask the community to join us, and we needed them. The remaining three hours became my first full listening session, where Dawn learned that the agency and the community stakeholders felt trapped by perceived apathetic responses and services treating only the symptom. Throughout the project, we were bad listeners; everyone was so busy focusing on services that we lost sight of the communities' assets and people's motivation to improve things. After the meeting and conclusion of the project, Dawn went back to the communities and held listening conversations; she simply shared a draft copy of the report and asked what was missed. In a nutshell, while we had addressed many of the concerns – we had missed the human element of supporting youth in transitions, dreams and personal talents. Missing this vital component allowed the community to perceive the project as apathetic.

The reflexive lesson in this experience for Dawn was rethinking the epistemological position of the community, the context, and the purpose of the research. There are times when traditional focus groups, defined as a top-down approach, careful selection of a low number of participants are not only valid but instrumental. There are other times when a bottom-up design approach and the group size is based on local, social, cultural, and physical conditions is more effective. This realization led to additional study in restorative circles, decolonizing & feminist methodologies, and transformational frameworks.

As a circle keeper, Dawn has conducted circles for organizations that have been struggling with racial equity. These circles were designed to empower the participants, reveal places where there was performative allyship, and develop a shared vision for their workplace. Dawn also utilizes a sharing circle for people suffering from addiction to support one another and communicate their needs as they move into their first sixteen weeks of sobriety. Other community circles include grief circles that occur after traumatic events of community violence, which have resulted in the loss of life in addition to community grief circles throughout the COVID-19 pandemic.

### **Dawn Valentine Bio**

Dawn Valentine (she/her/WE), founder and Lead Consultant of Valentine Consulting, has more than twenty-five years of experience in community-based public health, direct healthcare services, and social science research, and more than eight years of experience consulting in program evaluation and continuous quality improvement. She has worked as the Project Coordinator/Director on multiple research projects funded by NIH and CDC; Program Director for long term care facilities funded by CMS;

lead evaluator for DC Tobacco Control, CDC Community Transformation Grant, Chronic Disease Program: Million Hearts and DC Rape Prevention Program. She has consulted with Baltimore City government, DC government, and Montgomery County government in addition to a host of nonprofit organizations and coalitions.

As a consultant Ms. Valentine frequently works at the intersection of public policy and health (e.g., alternative health, mental health and public health) where policy change can have a significant impact at all levels, and supports her clients on understanding the impact or the potential impact of large and small policy decisions. To this end she has participated in BRFSS development for the District of Columbia; developed and supported the implementation the Adult Tobacco Survey; she has also developed survey instruments for evaluation purposes; worked with stakeholders to develop a theory of change; developed logic models, conducted needs assessments; provided technical assistance in administrative requirements for allowable expenses for improved program outcomes; community ethnographic studies as preparatory work for interventions; conducted focus groups as well as long and short form interviews in person.

Ms. Valentine studied Healthcare Administration at Washington Adventist University, Public Administration and Public Policy at Walden University, and Public Health with an emphasis in epidemiology at George Washington University. Her dissertation on “The Lived Experiences in Tenured Homeownership Among American Black Households in Washington DC: will be published in December 2022.

### **Allison Shurilla Bio**

Allison Shurilla (she/they), founder and Lead Consultant of AS Community Consulting, has over 12 years of experience consulting nonprofits, schools, and public agencies on their evaluation and research goals. In addition to her consulting experience, she has 20 years of experience working in the education and nonprofit sector as a staff member, volunteer, educator, and board member, including extensive experience in education and youth work. She also has backgrounds in public health, community engagement, and the arts in a local, national, and international capacity.

Shurilla has experience working with a variety of community-based organizations as well as state and local governments and has led a number of projects focused on community-based research, needs assessments, and coordination of diverse sets of stakeholders. Her company, AS Community Consulting, also specializes in finding usable data and research solutions for the organizations it works with. This expertise will be valuable in ensuring that ongoing research and community feedback strategies will be appropriate and sustainable after this initial project is completed.

Shurilla’s approach to research and evaluation uses a combination of traditional evaluation consulting, social justice-based research methodologies, community organizing principles, and coaching techniques. She founded AS Community Consulting, Inc. with the mission of using her evaluation and research expertise to contribute to social change through honoring and uplifting the expertise of communities that are often disenfranchised, especially in the research world.

Shurilla holds a BA in sociology from the University of Minnesota and a Masters in Public Policy (MPP) from the Humphrey School of Public Affairs where she studied social and global policy, nonprofit

management, and research methodology. You can learn more about Allison and AS Community Consulting here: <https://www.asevaluation.com>.

**Relevant past project examples include:**

Research consultant for statewide interagency PDG (Preschool Development Grant) strategic planning process. This project engaged a community advisory committee and community-based listening sessions led by community members to assess and provide recommendations for the state's programs serving young children. Our role included analysis of 75 community-based focus groups, coordination of the research team, collaborating with an overall project team that included multiple state agencies, and coordinating a participatory analysis process with the community advisory committee.

Coordinated evaluation of a community-based public health effort that incorporated in-person survey distribution via Community Health Workers.

Conducted analysis of statewide needs assessment with a University Extension department. The project included analysis of interviews and community listening sessions conducted by community members and coordination with those community members to gather information and feedback throughout the analysis process.

Lead a statewide research project assessing programs and policies to reduce the educational gap for the Minnesota Latino community through community assets and a positive focus on cultural reputation and heritage. Our work included case study analysis of exemplary educational programs, individual interviews, and data review, as well as consultation on a second phase pilot project. Products include identification of best practices, policy recommendations, and written and verbal reports and presentations.

**Tecorai Jones Bio**

Tecoria Jones (she/her) community advocate has 15 years of experience advocating for positive youth development programs with local, state and federal government. She has managed incubator programs, developed summer camp curriculum and acted as a service provider. Jones has been a consultant with the Standards Review Committee with National Family Support Network, Chair for 2022 Together For Families Parent Lead with ACF/ECD Radical Family Engagement Think Tank, Thriving Families, Safer Children-South Carolina Initiative and National Committees Board Member, Be Strong Families, National Children's Trust Fund Parent Leader with the Birth Parent National Network (BPNN) and Birth and Foster Parent National Network. Jones also has lived experience with the foster care system and caregiver to children other than her own.

As a community advocate Jones often moderates and facilitates difficult conversations. She has utilized her skills in supporting nonprofit organizations as a board member in maintaining connection to their community. She is also a trained circle keeper and facilitates difficult conversations around racial equity. She has facilitated conversations across the United States within organizations and within universities.



## Budget Narrative

Budget Category	Requested Funds
Personnel	\$57,500
Travel and Space Rental	\$7,500
Marketing	\$2,500
Supplies and Printing	\$7,500
Stipends and Gift Cards	\$20,000
Training Fees	\$5,000
Total	\$100,000

### Budget Justification

#### Staff Salaries

- Dawn Valentine – Co-Program Lead – \$50/hour estimated 500 hours - \$25,000
- Allison Shurilla – Co-Program Lead - \$50/hour estimated 500 hours - \$25,000
- Tecoria Jones – Listening Circle Lead - \$40/hour estimated 187 hours - \$7,500

#### Travel and Space Rental

- Allocation for hotel fees, milage reimbursement and air fare is \$5000
- Allocation of local office space during the funding period \$2500

#### Marketing

- Social media marketing ads and WordPress website with domain for one year \$2,500

#### Supplies and printing

- General office supplies \$2,000
- Printing for surveys, training materials, signage, final storyboard etc. \$5,500

#### Stipends and gift cards

- Survey stipends for community members (250 surveys @ \$20) and raffle for survey completion (10 @ \$50 and 5 @ \$100) -
- Stipends for advisory board (\$100), focus group facilitators (\$100) focus groups participants (\$20) and listening circle participants (\$20) - \$14,000

#### Training Fees

- Training consultant fees for focus groups \$5,000

## Principal Evaluation Consultant

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### PERSONAL PROFILE

Program evaluator, researcher and strategic planner with fifteen years of experience applying participatory and culturally responsive methodology for elevating stakeholders in program evaluations and increasing individual & organizational evaluation capacity building.

### AREAS OF EXPERTISE

- Appreciative Inquiry
- Contemplative Inquiry
- Developmental and Utilization Focused Evaluation
- Empowerment and Participatory Frameworks
- Intersectionality of Race, Gender, Class and Disability
- Policy Analysis through Critical Race Theory
- Social Movements, Politics and Social Change of American Black Peoples
- Qualitative Research Methodology (e.g. oral history, grounded theory, narrative analysis, content analysis) and Statistics

### CONTACT:

Phone: +1 240 401 8975  
Email: dawn@variablescoop.com  
www.variablescoop.com

### WORK EXPERIENCE AND CONSULTING

Principal Consultant 2012- Current  
Valentine Consulting  
Silver Spring, Maryland

Independent evaluation and research projects include Association of Community Services Howard County, African American Health Association of Montgomery County, Baltimore Health Department, CHEER, DC Department of Behavioral Health, DC Tobacco Free Coalition, Women's Collective. In this work, Dawn utilizes contemplative inquiry and an interpretive approach in the research process to better understand assets in communities or to understand the dynamics of a problem a program is trying to solve. Dawn partners with mission driven organizations and programs to advance equity and supports this transformation through a culturally responsive and participatory evaluation approach to advance equitable outcomes through inclusivity by working with affected marginalized communities in the evaluation design, implementation, and meaning-making process.

Lead Program Evaluation Consultant 2015-2020  
DC Department of Health  
Washington, DC

Designed and evaluated multi-year CDC funded grants for DC Health: Community Transformation Grants, Chronic Disease, Rape Prevention and Tobacco Control. Facilitated program key indicator development meetings with internal stakeholders within the Department of Health, decision makers of local coalitions and developed logic models as well as formative and summative evaluation designs. Managed collaborative partnerships with coalitions, content area experts, technical assistance providers, funding agencies, data analysts, and curriculum designers for fidelity in implementation studies. Provided technical assistance to grantees and stakeholders. Convene stakeholder meetings as part of community improvement or participatory evaluation process. Led the development and customization of user-friendly data collection systems aligned with funder workplans that increase grantee and evaluator efficiency. Adapted surveillance tools for program utilization such as BRFSS and developed the DC Adult Tobacco Survey. Performed data analysis and supported performance reporting. Utilized culturally responsive and utilization-focused evaluation deliverables that leverage case studies from other states and national associations, data visualization community presentations to support data-informed decisions with a feedback loop.

# DAWN VALENTINE

## WORK EXPERIENCE AND CONSULTING

Program Director 2009-2010

Johns Hopkins University  
Baltimore MD

Program Director for a dual NIH and CDC grant funded community based participatory research study on home safety in East Baltimore. Supported the grants with supplemental funding for supplies. Coordinated with principal investigator and ten co-principal investigators in conjunction with Baltimore City Fire Department and Baltimore Office of the Mayor to develop a scope of work which included timelines and protocols. Developed and managed neighborhood community working groups; train and managed community health workers in motivation interviewing techniques. Foster and maintain relationships with various local community organizations through community outreach with neighborhood associations in East Baltimore. Administrative support with all budget expenditures and management of IRB applications and documents.

Project Coordinator | Research Associate & Assistant 2005-2009

Children's National Medical Center  
Washington DC

Program Coordinator, NIH funded research project for young African American and Latina mothers in the Washington DC metro area. Research Associate, locally funded DC CHIP evaluation and impact study. Research Assistant for a parent provider study, pediatric residents and young mothers study. Specific duties: developed protocols for data collection and recruitment; managed participant and recruitment database; managed the Center Six recruitment for research studies within the Goldberg Centers; interviewed and trained research assistants; maintained a log of all key decisions senior investigators; annual report writing IRB and NIH progress reports; managed all budget expenditures and IRB documents for additional amendments. Analyzed data using quantitative statistical analysis; Designed evaluation tools and data collection systems, conducted data analysis for CHIP program, Assisted in researching CHIP programs in other states; conducted literature reviews and wrote annotated bibliographies for papers and new grant proposals; drafted outlines for formal papers and policy documents.

## ACADEMIC BACKGROUND

### Walden University

PhD in Public Policy | December 2022

Masters of Public Administration

- Pi Alpha Alpha Honor Society

- Doctoral Thesis: Lived Experience of American Black Tenured Homeownership in the District Of Columbia

### George Washington University

Masters of Public Health | Epidemiology

### Columbia Union College

Bachelor of Science: Healthcare Administration

# DAWN VALENTINE

## PROFESSIONAL AFFILIATIONS

- American Evaluation Association
- Washington Evaluators
- Oral History Association
- International Association of Yoga Therapists
- American Society for Public Administration

## CONTACT ME AT:

Phone: +1 240 401 8975  
 Email: dawn@variablescoop.com  
 www.variablescoop.com

## COMMUNITY SERVICE

Committee Member, Environmental Program Evaluation TIG	
Committee Member, Feminist Issues in Evaluation TIG	
Program Chair, Advocacy and Policy TIG	
American Evaluation Association	2020-Present
Co-Chair Committe Member Measurement and Evaluation Subcommittee	2014-2017
Co-Chair Mental Health Committe Member African American Health Program	2013-2018
Committe Member HEAA Community Working Group	2013-2014

## METHODOLOGICAL TRAINING

Introduction to Oral History American University & DC Public Library	2020
Talking with Photovoice Photovoice Worldwide	2019
Developmental Evaluation Michael Patton	2016
Utilization Focused Evaluation Michael Patton	2016
Exploratory Factor Analysis University of MD College Park	2013
Social Policy for Disability Services Disability Advocate Training	2012
Time Series Analysis National Institute of Health	2011
Utilizing Interviews and Focus Groups Johns Hopkins University	2010
Program Evaluation for Public Health Centers for Disease Control	2008
Tools for Scientific Writing George Washington University	2008

# Allison B. Shurilla, M.P.P.

Brooklyn, NY

Phone: (612)205-4947  
E-mail: alli@asevaluation.com

## Work Experience:

### Lead Research and Evaluation Consultant (2014-present)

AS Community Consulting, Inc.

- Qualitative data analyst for Minnesota's interagency PDG (Preschool Development Grant) strategic planning process. Role included analysis of 75 community-based focus groups, collaborating with multiple state agencies, and coordinating a participatory analysis process with a statewide community advisory committee.
- Conducting qualitative data collection and analysis of the collaborative care model of mental health services through a Brooklyn hospital serving low-income and underserved community members. Evaluation includes annual focus groups and interviews with hospital patients, interviews and focus groups with hospital staff, analysis of qualitative and quantitative data, and annual report of findings.
- Designed a qualitative evaluation plan and tools for an education-based NGO in El Salvador. Work included determination of short, medium, and long-term qualitative goals, evaluation plan design, tool design, and consultation on implementation and analysis. Evaluation also included incorporation of iPad and virtual technology for community-facilitated data collection and analysis.
- Provided evaluation consulting and coaching to a community-based nonprofit serving the South Bronx community. Evaluation focused on a community-based arts initiative sponsoring jazz ensemble performance in open community spaces. All summaries included visual representation of data (charts), basic analysis, text summary, and recommendations.
- Lead development of the Minneapolis Public Schools' Youth Participatory Evaluation program. This program engages students in all district schools serving grades 6-12 in leading evaluation projects in their school. Role included developing program, coaching students and school staff, coordinating and facilitating large group workshops and summits, and facilitating action initiatives based on findings.

### Research Associate (2012-2014)

HACER- Hispanic Advocacy and Community Empowerment through Research

- Provided evaluation technical assistance to the Minnesota Department of Health Eliminating Health Disparities Initiative grantees- involved consulting on evaluation activities for 6 Latino, Native American, and African American serving organizations.
- Lead on a research project assessing programs and policies to reduce the educational gap for Latinos through community assets and a positive focus on cultural reputation and heritage. Included case study analysis of exemplary educational programs, individual interviews, and data review, as well as consultation on a second phase pilot project. Products include identification of best practices, policy recommendations, and written and verbal reports and presentations.
- Conducted program evaluations and prepared final reports for 3 community-based health initiatives serving Latinos. Evaluations included regular communication with partner organization, modifications to evaluation design, and data analysis.

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**Skill Highlights:**


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**Research and Evaluation Skills:**

- In depth experience in program evaluation design, consulting, analysis, and reporting.
- Extensive experience in community-based research and evaluation methods
- Demonstrated ability to design and complete qualitative and quantitative research projects for a variety of clients and audiences, including nonprofit, education, state and local government, foundation, and the general public.
- Adept at literature review, interpretation of research for multiple audiences, identification of recommendations, presentation of findings, and production of written documents.
- Comprehensive experience in QSR NVivo and Dedoose; proficient in SPSS, STATA, and data analysis, including regression and multivariate statistical techniques.
- Highly skilled at synthesis of data and recognition of themes.
- Skilled with computers and able to quickly adapt new computer skills.
- Strong critical thinking, written and verbal communication, and presentation skills.

**Program Management and Community Experience:**

- Work with diverse communities, including in-depth experience with Latine, East African, Hmong, and low-income populations.
- Coordination of programming with community organizations.
- Direct experience with nonprofit and community-based organizations, including grant writing, event coordination, and meeting facilitation.
- Fluent in Spanish, proficient in Portuguese.
- Extensive experience in out of school time education.
- Understanding of the local, state, and national political process.
- International experience and awareness; direct experience in El Salvador, Mexico, and the Dominican Republic.

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**Education:**


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University of Minnesota: Twin Cities

Hubert H. Humphrey Institute of Public Affairs; 2008-2010

**Masters in Public Policy: Education, Immigration, and International Policy**

University of Minnesota: Twin Cities; 2003-2007

**B.A. in Sociology and Spanish Studies**

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**Publications**


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- Shurilla, A., Deal-Marquez, G., Ebinger, C., Gutierrez, R. (2012) *Opportunities and Challenges: The Education of Latinos in Minnesota*.
  - Aleixo, M., Chin, J., Fennelly, K., & Shurilla, A. (2011). Analysis of Policies toward Applications from Undocumented Students at Big Ten Schools in 2009. *Law and Inequality: A Journal of Theory and Practice*. Vol. 30, Issue 1.
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# Tecoria A Jones

## CONSULTANT

Facilitator, Co-Design Specialist, Communicator

[tecoriaajones@gmail.com](mailto:tecoriaajones@gmail.com); (803) 989-0202

208 Sheridan Drive; Columbia, SC; 29223

- I create intentional connection to create relationships, trust and collective action.
- I serve parents, families, and communities.
- I value and pursue data, narrating and illustrating it with expertise and varied lived experiences.
- I prioritize strength-based languages and approaches in co-design and communication.

### RECENT CONSULTANT WORK

Standards Review Committee with National Family Support Network  
 Chair for 2022 Together For Families  
 Parent Lead with ACF/ECD Radical Family Engagement Think Tank  
 Thriving Families, Safer Children-South Carolina Initiative and National Committees  
 Board Member, Be Strong Families  
 Circle Keeper and Circle Keeper Trainer  
 National Children's Trust Fund Parent Leader with the Birth Parent National Network (BPNN) and Birth and Foster Parent National Network

### PRIOR EXPERIENCE

**February 2018-August 2020** *Referral and Outreach Coordinator SC Child Care Inclusion Collaborative, Child Development Research Center, UofSC-Columbia's College of Education*: Provided resources childcare, special needs and concrete supports for parents/caregivers-Administrative assistant duties-Agency-based outreach

**April 2016 - January 2017** *Federation of Families/Continuum of Care, SC State Capitol Complex*  
 Parent Peer Support Provider: Establish and build relationships with youth and their families- Establish and build relationships with community partners- Hold trainings- Coordinate meetings- Data entry

**October 2012 - September 2015** *Whole Foods Market, Columbia, SC* Buyer: Operate on a budget within margin -Compile comprehensive reports in a timely manner -Train and supervise team members - Effective Communication

**April 2009 - August 2010** *Growing New Farmers Incubator Program & Joseph Fields Farm; John's Island, SC* Farmer's Apprentice: Create, maintain online market for farm-to-chef operations -Set-up, manage open air markets - Train and supervise farm workers and new apprentices -Farm hand duties - Administrative duties

### EDUCATION

**July 1991** Dreher High School, Columbia, SC HSD with Honors

**1991-1992** COURSEWORK: Columbia College, Columbia, SC: Chemistry Education Major

**MAY 1998** University of South Carolina, Columbia, SC Bachelor of Arts in Interdisciplinary Studies in Social Studies, Criminology, Urban Geography, Politics and International Studies

**2006-2007** COURSEWORK: Colorado Technical University, MA Project Management

VOLUNTARY SERVICE

**June 2020-present** FoodShare delivery driver

**March 2019-February 2022** PRISMA Children's Hospital Family Advisory Council-Member, Current Chair.

**August 2018-June 2021**

School Improvement Council, current Chair at JCE  
Richland Two PAC

**August 2018-present**

Birth Parent National Network, Birth Parent  
Birth and Foster Parent Partnership, Birth Parent

**April 2017-present**

Children's Trust Child Wellbeing Coalition; Leadership Team  
Parent Matters of the Midlands Lead Parent

**November 2016-June 2017**

Clemson Road Child Development Center  
Parent Volunteer, Assist Teacher and TA to reinforce Conscious Discipline techniques

**May 2011-February 2012**

WJB Dorn Medical Center, Columbia, SC  
Nutrition Clinic/TeleMove: Provide program support, Data entry, Direct service to veterans

CERTIFICATIONS & TRAININGS

Trauma- Recovery Needs Awareness/Protective Factors

**Adverse Child Experiences  
(Trainer)**

Parent Peer Support Provider

**Protective Factors Framework  
(Trainer)**

W.R.A.P. Wellness Recovery  
Action Plan

Be Strong Families Parent Cafe

Massage Therapist (licensing application in process)



**File Attachments for Item:**

13. Billboard Advertisements (Dan Douglas)

**Item:**

Billboard Advertisements (Dan Douglas)

**Requested Action:**

Receive update on Billboard Advertisement

**Background:**

Dr. Karen Cole-Smith has asked for a report on the use of billboard advertising. The goal is to generate more awareness of the Children's Trust of Alachua County throughout the County.

We are working with Clear Channel Outdoors to identify billboards in the community that would be desirable for the Trust. We are focused on identifying high-traffic areas in the community and not on Interstate 75. We are currently personally viewing sites provided by a billboard vendor.

Factors affecting billboard advertising:

1. Inventory: There are only a handful of vacant (or soon to be vacant) billboard and available billboards change on a weekly basis.
2. Costs vary by location and size.
3. Effective billboards have 6 to 10 words and 1 or 2 images, depending on size of the billboard.

**Attachments:**

None

**Programmatic Impact:**

None

**Fiscal Impact:**

TBD

**Recommendation:**

Receive report