



REGULAR MEETING AGENDA

August 03, 2020 at 4:00 PM

Virtual Meeting (see last page for information)

Call to Order

Roll Call

Agenda Review, Revision and Approval

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

Consent Agenda

Any member of the Trust may ask that an item be moved from the Consent Agenda to the Regular Agenda. Consent Agenda items will not be discussed unless moved to the Regular Agenda.

1. [06.29.2020 Approval of Regular Meeting Minutes](#)
2. [3rd Quarter Report to the Alachua County Board of County Commissioners](#)
3. [June 2020 Checks and Expenditures Report](#)
4. [Budget Amendment – Star Center Children’s Theatre, Inc.](#)
5. [Purchase Authorization – Office Environments](#)
6. [Authorization to Execute Contracts through 9.30.2021](#)
7. [Joint Meeting Requests](#)

Executive Director Report

8. [8.3.2020 Executive Director's Report](#)

Finance Report

9. [3rd Quarter Budget Review](#)

Action Items

10. [Adoption of Resolution 2020-8 Employee Handbook](#)
11. [Adoption of Resolution 2020-9 Employee Classification and Compensation Plan](#)
12. [Adoption of Resolution 2020-10 Membership into the Florida Retirement System](#)

General Public Comments

Board Member Comments

For Your Information

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

13. [Star Center Children's Theatre Inc. in the News](#)

14. [ACES Articles from the Gainesville Sun \(2017\)](#)

Next Meeting Date

Workshop - Monday, August 17, 2020 @ 3:00 PM (VIRTUAL MEETING)

Regular Meeting - Monday, August 31, 2020 @ 4:00 PM (VIRTUAL MEETING)

Regular Meeting - Monday, September 14, 2020 @ 4:00 PM 602 E. University Ave (or VIRTUAL MEETING)

Regular Meeting - Monday, September 21, 2020 @ 4:00 PM 602 E. University Ave (or VIRTUAL MEETING)

Adjournment

Virtual Meeting Information

There are four (4) ways for the public to participate in the meeting.

1) Public comments can be emailed to
childrenstrust@childrenstrustofalachuacounty.us.

Comments must be received by **2:00 PM on Monday, August 3rd**.

2) View the meeting as a webinar at this link:
https://us02web.zoom.us/webinar/register/WN_jxUPNcHLTUyOptErWnfrFQ.

Those who wish to participate this way must register. Registering serves the function of a “sign-in” sheet at a Regular Trust Meeting.

3) View the meeting on Facebook Live
at <https://www.facebook.com/ChildrensTrustofAlachuaCounty>.

4) Call **+1 312 626 6799; and Use Meeting ID 891 4336 8721**

File Attachments for Item:

06.29.2020 Approval of Regular Meeting Minutes



REGULAR MEETING MINUTES

DRAFT

June 29, 2020 at 4:00 PM

Virtual Meeting (see last page for information)

Call to Order

Chair Lee Pinkoson called the meeting to order at 4:03 pm

Roll Call

PRESENT

Chair Lee Pinkoson
Vice Chair Maggie Labarta
Member Patricia Snyder
Member Susanne Wilson Bullard
Member Tina Certain
Member Karen Cole-Smith
Member Ken Cornell
Member Nancy Hardt

ABSENT

Member Cheryl Twombly
Member Karen Clarke

Agenda Review, Revision and Approval

There were no changes to the agenda.

Consent Agenda

Motion made to approve the Consent Agenda by Member Certain. Seconded by Member Cornell.

Voting Yea: Chair Pinkoson, Vice Chair Labarta, Member Snyder, Member Wilson Bullard, Member Certain, Member Cole-Smith, Member Cornell, Member Hardt

1. 6.15.20 Trust Meeting Minutes

2. Resolution 2020-05 - Appreciation for the work of the Technical Advisory Committee.

Executive Director Report

ED Murphy discussed asked for feedback on the workshop that the Trust proposed to hold to discuss the findings and next steps following the presentation by the Technical Advisory Committee.

Vice Chair Labarta asked that the measures presented be ones that carry the most impact, as well as the ones that are the most significantly behind, or most indicative of a serious problems.

Member Hardt said she was hoping for more time together as a board to share expertise. Member Certain agreed that more time together as a board was important.

Member Cornell agreed with all the previous comments. He spoke of the importance of leveraging expertise in both the preK world and the afterschool and in-school world.

Chair Pinkoson said that it was important for Trust members to review the information of the Technical Advisory Committee prior to the meeting to determine if there were items of interest that Trust members wanted to include in the workshop.

Vice Chair Labarta said that if the data was organized around the goals, members can bring their expertise. She said that ED Murphy's assignment will be to make it clear what data the Trust members would need to know the story behind.

ED Murphy introduced Anna Dilernia as a consultant. Ms. Dilernia has a background as a research and evaluation specialist to discuss the scope of the portfolio review to be presented to the Trust at the August workshop.

Member Cornell asked Ms. Dilernia if she has reviewed the Technical Advsiory Report. Ms. Dilernia said she has not, however, Member Cornell was interested in hearing what other communities have done that may have faced similar challenges as Alachua County.

Member Hardt discussed root cause analysis and how different programs connect together. Ms. Dilernia discussed the importance of agency capacity.

Member Hardt discussed the importance of programs working together. Member Cole-Smith asked Ms. Dilernia how to deal with agencies frustrated with slow progress. Ms. Dilernia discussed the importance of closing the loop with agencies.

Member Snyder said that it will be important to look at the RFP's of the three early learning programs because those have the aspirations.

Member Cornell asked for recommendations as to who should be funding what.

ED Murphy said that many of the questions from Trust members may turn into topics for additional research.

ED Murphy discussed beginning to develop a Transformational Professional Development program for out-of-school time programs.

Member Cole-Smith asked if this was affiliated with BOOST. ED Murphy said that this would be developed in conjunction with BOOST.

Member Certain said she supported this idea and recognized the need for groups, especially smaller groups, to receive support.

Motion to hold the workshop on August 17, 2020 and add a meeting on August 31, 2020 was made by Member Cornell, Seconded by Member Certain.

Vice Chair Labarta said that she would like to make sure that the workshop is long enough to have an adequate discussion.

There were no comments from the public.

Voting Yea: Chair Pinkoson, Vice Chair Labarta, Member Snyder, Member Wilson Bullard, Member Certain, Member Cole-Smith, Member Cornell, Member Hardt

3. Report for 6.29.20

Action Items

4. Proposed Millage Rate and Tentative Budget for FY2020/2021

Motion made to approve a proposed millage rate of 0.500 mills in Resolution 2020-06 by Member Cornell, Seconded by Member Certain.

There were no comments from the public.

Voting Yea: Vice Chair Labarta, Member Snyder, Member Certain, Member Cole-Smith, Member Cornell, Member Hardt

Voting Nay: Chair Pinkoson

Voting Abstaining: Member Wilson Bullard

Motion made to approve a tentative budget of \$9,105,116 in Resolution 2020-07 by Member Cornell, Seconded by Member Certain.

Voting Yea: Vice Chair Labarta, Member Snyder, Member Wilson Bullard, Member Certain, Member Cole-Smith, Member Cornell, Member Hardt

Voting Nay: Chair Pinkoson

There were no comments from the public.

For Your Information

ED Murphy said that the Executive Order permits virtual meetings through the month of July.

5. Executive Order 20-150

General Public Comments

There were no public comments.

Board Member Comments

Commissioner Cornell said that the Interlocal Agreement with the County expires on October 1. He also suggested joint meetings with the School Board, the City of Gainesville, and the Board of County Commissioners in the months of October, November, and January. He also said that the Board of County Commissioners is having a meeting on July 7, 2020 to discuss how to allocate \$46 million in CARES funding. The priorities will be to provide relief for citizens in the form of housing, food, shelter, and utilities.

Adjournment

Chair Pinkoson adjourned the meeting at 5:17 pm.

File Attachments for Item:

2. 3rd Quarter Report to the Alachua County Board of County Commissioners

**Item:**

3rd Quarter Report to the Alachua County Board of County Commissioners

Requested Action:

The Trust is asked to 1) approve the report, and 2) authorize the Chair to transmit the report to the Alachua County Board of County Commissioners.

Background

Pursuant to Florida Statute 125.901(3)(f) and Alachua County Board of County Commissioners Ordinance 26.04 (5)(f), the Children's Trust of Alachua County is required to present to the Alachua County Board of County Commissioners a report that lists the expenditures, receipts, statement of funds on hand invested or deposited with a qualified public depository, and total administrative costs for the quarter annual period.

A summary Year-to-Date for the 3rd Quarter is as follows:

1) Expenditures:	\$ 970,157
2) Receipts:	\$ 7,340,113
3) Statement of Funds on Hand:	\$ 6,369,956
4) Total Administrative Costs:	\$ 315,801

Attachments

Transmittal Memo

Programmatic Impact:

NA

Fiscal Impact:

NA

Recommendation:

Staff recommends approval



TO: ROBERT HUTCHISON, CHAIR
ALACHUA COUNTY BOARD OF COUNTY COMMISSIONERS

FROM: LEE PINKOSON, CHAIR
CHILDREN'S TRUST OF ALACHUA COUNTY

SUBJECT: 3RD QUARTER FINANCIAL REPORT

DATE: AUGUST 3, 2020

Pursuant to Florida Statute 125.901(3)(f) and Alachua County Board of County Commissioners Ordinance 26.04 (5)(f), the Children's Trust of Alachua County presents to the Alachua County Board of County Commissioners its FY 2020 3rd Quarter Financial Reports for Period Ending June 30th that lists the expenditures, receipts, statement of funds on hand invested or deposited with a qualified public depository, and total administrative costs for the quarter annual period.

A summary Year to Date for the 3rd Quarter is as follows:

- 1) Expenditures: \$ 970,157
- 2) Receipts: \$ 7,340,113
- 3) Statement of Funds on Hand: \$6,369,956 4
- 4) Total Administrative Costs: \$ 315,801

CC: Michele Lieberman, County Manager
Alachua County Board of County Commissioners
J.K. "Jess" Irby, Esq. Clerk of the Court & Comptroller
Children's Trust of Alachua County Board
Colin Murphy, Executive Director, Children's Trust of Alachua County



Income Statement

FY20 YTD 3rd Quarter Ending June 30, 2020

Item 2.

	FY 2020 Annual Budget	MTD Actual	FY 2020 YTD Actual	FY 2020 YTD Encumbrances	Budget to Actual Variance	% of Budget
Governmental Funds						
REVENUE						
Ad Valorem Taxes Current Real & Personal Property	7,238,758.00	217,361.26	7,329,564.97	.00	(90,806.97)	101
Ad Valorem Taxes Delinquent Taxes	.00	(4,347.23)	(7,058.74)	.00	7,058.74	ss
Interest And Other Earnings Int Earn - Tax Collector	.00	.00	1,235.07	.00	(1,235.07)	+++
Interest And Other Earnings General Government Interest	.00	3,944.17	16,372.16	.00	(16,372.16)	+++
Non-Operating Sources Ending Fund Balance	(361,938.00)	.00	.00	.00	(361,938.00)	0
Revenue Totals	\$6,876,820	\$216,958	\$7,340,113	\$0	(\$463,293)	107%
Financial and Administrative						
EXPENSE						
Professional Services Professional Services	500,000.00	466.66	134,577.97	.00	365,422.03	27
Professional Services Property Appr / Tax Collector	144,775.00	5,881.52	145,664.08	(5,881.52)	4,992.44	97
Other Services Other Contractual Services	163,250.00	.00	35,250.00	.00	128,000.00	22
Other Current Charges and Obligations Other Current Chgs & Obligations	.00	159.23	308.55	.00	(308.55)	+++
Financial & Administrative Totals	\$808,025	\$6,507	\$315,801	(\$5,882)	\$498,106	38%
Other Human Services						
Professional Services Professional Services	277,784.00	.00	3,400.00	6,593.27	267,790.73	4
Travel and Per Diem Travel & Per Diem	5,000.00	.00	500.79	.00	4,499.21	10
Communications Services Communication Services	1,848.00	.00	.00	.00	1,848.00	0
Utility Services Utility Services	.00	.00	220.00	.00	(220.00)	+++
Rental and Leases Rental and Leases	22,360.00	7,125.00	7,125.00	4,750.00	10,485.00	53
Insurance Insurance	1,000.00	.00	.00	.00	1,000.00	0
Repairs and Maintenance Services Repairs and Maintenance	1,000.00	.00	.00	.00	1,000.00	0
Promotional Activities Promotional Activities	10,000.00	.00	402.81	.00	9,597.19	4
Other Current Charges and Obligations Other Current Chgs & Obligations	15,309.00	.00	.00	.00	15,309.00	0
Office Supplies Office Supplies	19,595.00	.00	428.19	4,571.81	14,595.00	26
Operating Supplies Operating Supplies	64,936.00	8,360.10	9,754.74	11,234.90	43,946.36	32
Books Publications Subscriptions and Memberships Memberships	.00	.00	9,309.00	.00	(9,309.00)	+++
Capital Outlay Capital Equipment	30,000.00	.00	.00	.00	30,000.00	0
Aid to Private Organizations Aid to Private Organizations	2,224,908.00	.00	.00	.00	2,224,908.00	0

	FY 2020	MTD	FY 2020	FY 2020	Budget to Actual	Item 2.
	Annual Budget	Actual	YTD Actual	YTD Encumbrances	Variance	Budget
Aid to Private Organizations Healthy Start of North Centrl FL	400,000.00	.00	142,330.61	257,669.39	.00	100
Aid to Private Organizations The Child Center	439,228.00	18,721.85	163,882.89	275,345.11	.00	100
Aid to Private Organizations Meridian Behaviorial Healthcare	354,636.00	23,289.83	176,466.20	178,169.80	.00	100
Aid to Private Organizations Alachua County Sheriff's Office	113,995.00	44,270.00	44,270.00	69,725.00	.00	100
Aid to Private Organizations BOOST Project Alliance	36,060.00	.00	.00	.00	36,060.00	0
Aid to Private Organizations Cade Museum Foundation	104,960.00	.00	37,475.00	30,010.00	37,475.00	64
Aid to Private Organizations CDS Family-Behavioral Health Svc	65,325.00	.00	.00	65,325.00	.00	100
Aid to Private Organizations Children Beyond our Borders	14,909.00	133.25	133.25	14,775.75	.00	100
Aid to Private Organizations City of Alachua	135,002.00	.00	.00	.00	135,002.00	0
Aid to Private Organizations City of Gainesville - GPD	49,453.00	.00	.00	.00	49,453.00	0
Aid to Private Organizations Cultural Arts Coalition	22,044.00	.00	.00	.00	22,044.00	0
Aid to Private Organizations City of Gville - PRCA SkyBridge	14,802.00	.00	.00	14,802.00	.00	100
Aid to Private Organizations Girls Place, Inc - ACHIEVE	22,403.00	.00	.00	41,995.00	(19,592.00)	187
Aid to Private Organizations FL Institute for Workforce Innov	96,874.00	.00	.00	.00	96,874.00	0
Aid to Private Organizations Gainesville Police Department	8,450.00	.00	.00	.00	8,450.00	0
Aid to Private Organizations Peacefull Paths, Inc	27,500.00	.00	.00	.00	27,500.00	0
Aid to Private Organizations Girls on the Run-Alachua County	7,007.00	2,090.66	2,090.66	4,916.34	.00	100
Aid to Private Organizations Manhood Youth Development	22,500.00	.00	.00	.00	22,500.00	0
Aid to Private Organizations Mt. Carmel Baptist Church	14,655.00	.00	.00	.00	14,655.00	0
Aid to Private Organizations National Alliance Mental Illness	38,577.00	3,978.00	6,161.00	32,416.00	.00	100
Aid to Private Organizations Junior Achievement	10,000.00	.00	.00	.00	10,000.00	0
Aid to Private Organizations New Technology Made Simple Now	91,173.00	.00	.00	.00	91,173.00	0
Aid to Private Organizations PALS THRIVE (UF Health Program)	80,275.00	.00	.00	.00	80,275.00	0
Aid to Private Organizations Renaissance JAX (Swampbots FTC)	31,380.00	.00	.00	.00	31,380.00	0
Aid to Private Organizations River Phoenix Peacebuilding Ctr	19,500.00	.00	.00	19,500.00	.00	100
Aid to Private Organizations Star Center Childrens Theatre	60,284.00	4,870.25	4,870.25	55,413.75	.00	100
Aid to Private Organizations Together Gainesville	25,500.00	.00	.00	.00	25,500.00	0
Aid to Private Organizations United Church-Rawlings Food4Kids	8,900.00	.00	.00	.00	8,900.00	0
Aid to Private Organizations Boys & Girls Club Alachua County	36,000.00	.00	.00	.00	36,000.00	0
Aid to Private Organizations Early Learning Coalition	47,400.00	.00	.00	47,400.00	.00	100
Aid to Private Organizations United Way of Central Florida	5,812.00	.00	.00	5,812.00	.00	100
Aid to Private Organizations University of Florida	20,824.00	.00	.00	.00	20,824.00	0
Aid to Private Organizations UF Board/Trustees-FL Mus Nat His	40,163.00	.00	.00	.00	40,163.00	0
Aid to Private Organizations UF College of Dentistry	73,437.00	.00	.00	.00	73,437.00	0
Aid to Private Organizations UF College of Nursing FPA	15,569.00	.00	.00	.00	15,569.00	0

	FY 2020	MTD	FY 2020	FY 2020	Budget to Actual	
	Annual Budget	Actual	YTD Actual	YTD Encumbrances	Variance	Budget
Aid to Private Organizations Vineyard Christian Fellowship	77,690.00	27,034.76	32,870.16	44,819.84	.00	100
Aid to Private Organizations City of Gville - PRCA SummerCamp	19,302.00	.00	.00	19,302.00	.00	100
Aid to Private Organizations Girls Place Inc - Transportation	19,592.00	.00	.00	.00	19,592.00	0
Aid to Private Organizations Florida Organic Growers	11,704.00	.00	.00	11,704.00	.00	100
Aid to Private Organizations United Church Gville-Read to Win	43,823.00	.00	.00	43,823.00	.00	100
Aid to Private Organizations Gville Tennis Assoc-FitLite Proj	28,266.00	.00	.00	28,266.00	.00	100
Aid to Private Organizations Gville Tennis Assoc-After School	24,250.00	.00	.00	24,250.00	.00	100
Aid to Private Organizations Equal Access Clinic Network	7,475.00	.00	.00	.00	7,475.00	0
Aid to Private Organizations Planned Parenthood SENFL	25,000.00	.00	.00	.00	25,000.00	0
Aid to Private Organizations PACE Center for Girls, Inc	111,832.00	.00	.00	.00	111,832.00	0
Aid to Private Organizations Kids Count in Alachua County Inc	66,032.00	.00	.00	66,032.00	.00	100
Aid to Private Organizations Black on Black Crime Task Force	14,000.00	.00	.00	.00	14,000.00	0
Aid to Private Organizations Big Brothers Big Sisters	29,554.00	4,534.50	12,666.00	16,888.00	.00	100
Other Human Services Totals	\$5,706,857	\$144,408	\$654,357	\$1,395,510	\$3,656,990	36%
Other Non Operating Other Uses Appropriated Reserves	361,938.00	.00	.00	.00	361,938.00	0
REVENUE TOTALS	6,876,820.00	216,958.20	7,340,113.46	.00	(463,293.46)	107%
EXPENSE TOTALS	6,876,820.00	150,915.61	970,157.15	1,389,628.44	4,517,034.41	34%
Grand Total Net Gain (Loss)	\$0	\$66,043	\$6,369,956	(\$1,389,628)	\$4,980,328	+++

File Attachments for Item:

3. June 2020 Checks and Expenditures Report

**Item:**

June 2020 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

June 2020 Bank Activity Report

Programmatic Impact:

NA

Fiscal Impact:

NA

Recommendation:

Receive the Report

Children's Trust of Ala Cty LIVE

Monthly Bank Account Activity Report June 2020

Item 3.

Reconciled

From Date: 06/01/2020 - To Date: 06/30/2020

Bank	Bank Account						
Bank of America	ZBA Accounts Payable						
Deposits:	Date	Type	Deposit Information		Description	Department	Amount
No Transactions Exist							
Checks:	Status	Check Number	Payment Date	Reconciled	Source	Payee Name	Amount
No Transactions Exist							
	Reconciled	10035	06/03/2020	06/26/2020	Accounts Payable	BIG BROTHERS BIG SISTERS OF TAMPA BAY, INC.	8,131.50
	Reconciled	10036	06/03/2020	06/22/2020	Accounts Payable	CDW GOVERNMENT	1,237.79
	Reconciled	10037	06/03/2020	06/25/2020	Accounts Payable	HEALTHY START OF NORTH CENTRAL FL	13,023.41
	Reconciled	10038	06/03/2020	06/10/2020	Accounts Payable	REAL ESTATE ACQUISITION FOR CHILDREN, LLC	4,750.00
	Reconciled	10039	06/03/2020	06/26/2020	Accounts Payable	THE CHILDREN'S HEALTH IMAGINATION LEARNING & DEV	18,571.30
	Reconciled	10040	06/12/2020	06/18/2020	Accounts Payable	BANK OF AMERICA	152.28
	Reconciled	10042	06/12/2020	06/18/2020	Accounts Payable	Matson-Charlton Surety Group	200.00
	Reconciled	10043	06/12/2020	06/17/2020	Accounts Payable	MUNICODE	5,625.00
	Reconciled	10044	06/12/2020	06/18/2020	Accounts Payable	RIVERS, JENNIFER	155.50
	Reconciled	10045	06/19/2020	06/26/2020	Accounts Payable	ALACHUA COUNTY SHERIFF'S OFFICE	44,270.00
	Reconciled	10046	06/19/2020	06/26/2020	Accounts Payable	Alachua County Tax Collector	5,881.52
	Reconciled	10049	06/19/2020	06/26/2020	Accounts Payable	MERIDIAN BEHAVIORAL HEALTHCARE INC	23,289.83
	Reconciled	10050	06/19/2020	06/25/2020	Accounts Payable	NAMI GAINESVILLE, INC.	3,978.00
	Reconciled	10051	06/19/2020	06/24/2020	Accounts Payable	VINEYARD CHRISTIAN FELLOWSHIP OF GAINESVILLE, INC	27,034.76
							\$156,300.89
EFTs:	Status	EFT Number	Payment Date	Reconciled	Source	Payee Name	Amount
No Transactions Exist							
Returned Checks:	Date	Payer	Check Number		Amount		
No Transactions Exist							

Children's Trust of Ala Cty LIVE

Monthly Bank Account Activity Report June 2020

Item 3.

Reconciled

From Date: 06/01/2020 - To Date: 06/30/2020

Bank	Bank Account					
.	Wire Transfers:	Type	Date	Vendor	Description	Internal Account Amount
.	No Transactions Exist					
.	Adjustments:	Type	Date	Description		Amount
.	No Transactions Exist					

File Attachments for Item:

4. Budget Amendment – Star Center Children’s Theatre, Inc.

**Item:**

Budget Amendment – Star Center Children’s Theatre, Inc.

Requested Action:

The Trust is asked to approve the proposed budget amendment to contract #11571, Star Center Children’s Theatre.

Background

When the Star Center Children’s Theatre was awarded funding through RFP20-937, \$15,000 was in capital funding, divided between \$11,000 for a vehicle and \$4,000 for onsite storage/workshop. Technically, \$4,000 was below the capital threshold and this expense should have been classified as an operational expense in the procurement award and the agreement.

Following the award, the vendor realized that \$4000 was not sufficient to cover the costs of the onsite storage and workshop. The vendor recognized some savings as a result of COVID-19 in the contractual services line item, for costumes, and background checks, and has asked to use those funds towards covering the additional costs of \$3500 towards the onsite storage and workshop.

Resolution 2020-4 gives the Executive Director the authority to approve budget amendment requested by contracted providers so long as they don’t change the scope of work or exceed 10% of the overall contract value. In this case, both conditions hold; however, the Executive Director did want the Trust’s approval to increase the amount of capital funding as the amount of capital funding for each contract was explicit when the Trust approved the awards for RFP 20-937.

Attachments

Budget Revision and Amendment Request Form

Programmatic Impact:

NA

Fiscal Impact:

NA

Recommendation:

Staff recommends approval



BUDGET REVISION AND AMENDMENT REQUEST FORM (<10%)

A Budget Amendment Request Form must be submitted for CTAC approval. Please answer the questions below to support your request.

Organization Name:	Star Center Children's Theatre	Preparer's Email	spotlighttalk@gmail.com
Project Title:	Summer and Afterschool Program	Preparer's Phone:	(352) 870-0064
Request for Award ID:	RFA-937	Revision # (1, 2, 3)	1
Agreement Number:	11571	Amendment # (1, 2, 3)	
Budget Contact Name & Phone:	Rhonda Wilson Executive Director		
Request Date:	06/24/20		

Please answer the following qualifying questions (IF REQUESTING AMENDMENT TO ORIGINAL AWARD AMOUNT)

- 1 Is there a change in the scope or the objective of the project?
- 2 Is there a change in key personnel specific to the award amount?
- 3 Does this budget amendment or the cumulative sum of amendments increase the budget more than 10% of award amount

Select Yes/No
No
No
No

If your answer is "Yes" to at least one of the above questions, STOP & CONTACT CTAC TO DISCUSS YOUR REQUEST.



Attachment #	PROJECT BUDGET	Approved Budget	Expensed Y-T-D	DECREASE AMOUNT	INCREASE AMOUNT
	Personnel Expenses Salaries & Wages (List position and indicate FT or PT)				
	Background Checks	750.00	-	300.00	
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
		-	-	-	-
	Total Salaries & Wages	\$ 750.00	\$ -	\$ 300.00	
Attachment #					
	Total Personnel Expenses (Amendment)	\$ 750.00	\$ -	\$ 300.00	\$ -

Att	Operating Expenses (Non-Personnel)	Approved Budget	Expensed YTD	Decrease Amount	Increase Amount
	Supplies	400.00	82.98	-	1,200.00
	Travel	-	-	-	-
	Equipment	-	-	-	-
	Training	-	-	-	-
	Insurance(Van)	-	-	-	1,000.00
	Professional Services	-	-	-	-
	Contractual Services	31,600.00	2,000.00	4,200.00	-
	Printing & Copying	1,000.00	-	-	-
	Postage & Delivery	-	-	-	-
	Communications (Telephone / Fax / Internet)	-	-	-	-
	Other Operating Expenses (List Below):	-	-	-	-
	Costume/Sets	7,934.00	1,802.27	1,200.00	-
	Performance Rights	3,600.00	985.00	-	-
	Capital	-	-	-	-
	Onsite Storage/Workshop	4,000.00	-	-	3,500.00
	Van	11,000.00	-	-	-
Total Operating Expenses					
		\$ 59,534.00	\$ 4,870.25	\$ 5,400.00	\$ 5,700.00
TOTAL EXPENSES					
	(Personnel + Operating)	\$ 60,284.00	\$ 4,870.25	\$ 5,700.00	\$ 5,700.00
TOTAL ORIGINAL BUDGET					
		\$ 60,284.00			
INCREASE AMOUNT					
		\$ 5,700.00			
DECREASE AMOUNT					
		\$ 5,700.00			
INCREASE/DECREASE TOTAL					
		\$ -			
PERCENTAGE OF ORIGINAL BUDGET					
		0%			

For Office Use Only

Yes/No (Dropdown Box)

Request Approved:

Yes

Request Denied:

Authorized Approver:

Colin Murphy, Executive Director

Submit Amendment Request To:

invoice@childrenstrustofalachuacounty.us

(Email Preferred Method)

Children's Trust of Alachua County

Or Mail to PO Box

Attn: Finance & Administration Manager

PO Box 5669

Gainesville, FL 32627

Vendor #

File Attachments for Item:

5. Purchase Authorization – Office Environments

**Item:**

Purchase Authorization – Office Environments

Requested Action:

The Trust is asked to approve the purchase of 3 additional work stations in the amount of \$16,903.57, for a total purchase from Office Environments in the amount of \$57,514.46.

Background

The CTAC's policies authorize the Executive Director "enter into contracts within his signature authority without prior approval from the Trust in accordance with the Trust-approved procurement process." This authority is capped at \$50,000.

The Executive Director contracted with Office Environments to procure 5 work stations, furniture for 3 offices, a small reception area, and a break spot for the new Trust office location. The total amount of the purchase was \$40,610.89. The contract was procured by piggybacking on a State Term Contract, which is a purchasing tool whereby vendors are selected by the State of Florida through a competitive process to be on an approved purchasing list.

Following subsequent board discussions concerning the budget and future staffing needs, the Executive Director has determined that three additional work stations are needed, and would like to procure those stations using funds from FY20.

Notwithstanding the fact that the requested purchase is below the threshold, the total of the two purchases is above the \$50,000 threshold. As a general principle, purchases should not give the appearance of being broken into smaller purchases in order to avoid purchasing thresholds.

Attachments

3- Station quote

Original quote for 5 work stations, 3 offices, and waiting area

Office schematic – 8 work stations and 3 offices

Programmatic Impact:

None

Fiscal Impact:

\$16,903.57 from 001.15.1500.569.52.00

Recommendation:

Staff recommends approval

Office Environments
237 SW 7th Terrace
Suite B
Gainesville FL 32601
352-224-5161

CHILDREN'S TRUST OF ALACHUA
ADDITIONAL STATIONS - Option 1 & 2
PROPOSAL #G20944
STATE OF FLORIDA CONTRACT #425-001-12-1

1 OF 5
07/09/20 04:10 PM
Item 5.

Item	Mfg	Cat	Alias 3	Contract	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
1	HMG	HGC	LAYOUT OPTION 2 - 3 STATIONS	MH7375	3	AER1B23DW	+Work Chair, New Aeron, B Size, Std-Hgt Range Adj, Tilt Lim and Seat Angle, Fully Adj Arms, Non-Uphst Armpads +adjustable posturefit SL +mineral +satin aluminum +satin aluminum +2 1/2" caster, black yoke, hard floors or carpet +dark mineral +8Z Pellicle-Pr Cat 1 +8Z Pellicle mineral	\$ 736.63	\$ 2,209.89	64.500
2	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	24	EVCLVAR	Single Clamp (Fixed and Variable Height Posts)	\$ 2.73	\$ 65.52	61.000
3	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVCUSHION15X19X1	15"w x 19"d x 1"h, Pedestal Seat Cushion, Cushions are for use on EVS12xxBFLCM Mobile Pedestals Only ~GR04 Grade 04 Graded In Grade 04 Fabrics ~GPM4 Graded In Grade 04 Fabrics GPM4 Graded In Grade 04 Fabrics TOR CLFR, ENVIROLEATHER CALIFORNIA, CO...	\$ 81.90	\$ 245.70	61.000
4	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8CP16	16" - Jumper Cable, Panel to Panel	\$ 37.05	\$ 111.15	61.000
5	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8CP20	20" - Jumper Cable, Panel-Post-Panel	\$ 42.90	\$ 128.70	61.000
6	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS		1	EVE8FR1	72" Long, Reversible Floor Power Entry	\$ 103.74	\$ 103.74	61.000
7	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	7	EVE8PD36	36", Power Distribution Housing	\$ 63.57	\$ 444.99	61.000
8	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8RD1WHT	#1 Utility Circuit, Duplex Receptacle, White	\$ 10.53	\$ 31.59	61.000
9	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8RD2WHT	#2 Utility Circuit, Duplex Receptacle, White	\$ 10.53	\$ 31.59	61.000
10	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8RDAWHT	A, Dedicated Circuit, Duplex Receptacle, White	\$ 10.53	\$ 31.59	61.000

C:\Users\josbirn\Desktop\childrens trust G20778\G20944 CHILDREN'S TRUST OF ALACHUA - additional 3 stations.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

CHILDREN'S TRUST OF ALACHUA
ADDITIONAL STATIONS - Option 1 & 2
PROPOSAL #G20944
STATE OF FLORIDA CONTRACT #425-001-12-1

Item	Mfg	Cat	Alias 3	Contract	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
11	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVE8RDBWHT	B, Dedicated Circuit, Duplex Receptacle, White	\$ 10.53	\$ 31.59	61.000
12	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVHC18L	18", Left, Single Cantilever	\$ 32.60	\$ 97.80	61.000
						~STD TUN	Standard Paint Colors Tungsten			
13	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVHC18R	18", Right, Single Cantilever	\$ 32.60	\$ 97.80	61.000
						~STD TUN	Standard Paint Colors Tungsten			
14	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVHC24L	24", Left, Single Cantilever	\$ 37.32	\$ 111.96	61.000
						~STD TUN	Standard Paint Colors Tungsten			
15	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVHCB2	Corner Brackets Left and Right (Pair)	\$ 9.01	\$ 27.03	61.000
						~STD TUN	Standard Paint Colors Tungsten			
16	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	6	EVHFB1	Flat bracket (Available in Black Only)	\$ 5.07	\$ 30.42	61.000
17	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVHPB1	Pedestal Bracket	\$ 10.30	\$ 30.90	61.000
						~STD TUN	Standard Paint Colors Tungsten			
18	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	5	EVPCPA266	66"h, 2 Way Post, Includes Post, Hardware & Aluminum Trims	\$ 91.81	\$ 459.05	61.000
						~STD ~STD TUN	Standard Paint Colors Connectors w/ Matching Inlines (Use w/ Matc... Tungsten w/ Tungsten Inlines			

C:\Users\josbirn\Desktop\childrens trust G20778\G20944 CHILDREN'S TRUST OF ALACHUA - additional 3 stations.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
237 SW 7th Terrace
Suite B
Gainesville FL 32601
352-224-5161

CHILDREN'S TRUST OF ALACHUA
ADDITIONAL STATIONS - Option 1 & 2
PROPOSAL #G20944
STATE OF FLORIDA CONTRACT #425-001-12-1

3 OF 5
07/09/20 04:10 PM
Item 5.

Item	Mfg	Cat	Alias 3	Contract	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
19	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	2	EVPCPA366	66"h, 3 Way Post, Includes Post, Hardware & Aluminum Trims	\$ 119.26	\$ 238.52	61.000
						~STD	Standard Paint Colors			
						~STD	Connectors w/ Matching Inlines (Use w/ Matc...			
						TUN	Tungsten w/ Tungsten Inlines			
20	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	4	EVPERA66	66"h, End of Run Post, Includes Post, Hardware & Aluminum Trim	\$ 40.76	\$ 163.04	61.000
						~STD	Standard Paint Colors			
						~STD	Connectors w/ Matching Inlines (Use w/ Matc...			
						TUN	Tungsten w/ Tungsten Inlines			
21	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	12	EVPGTE2436	24"h x 36"w, Tempered Glass Extension Module	\$ 193.91	\$ 2,326.92	61.000
						~STD	Standard Paint Options			
						~STD	Panels w/ Matching Horizontal Reveal			
						TUN	Tungsten w/ Tungsten Horizontal Reveal			
						~Glazing	Glass Modules			
						I1	GT			
						CLR	Clear			
22	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	8	EVPH2S4236	42"h x 36"w, Laminate Panel, Double Sided	\$ 281.42	\$ 2,251.36	61.000
						~STD	Standard Paint Options			
						~STD	Panels w/ Matching Horizontal Reveal			
						TUN	Tungsten w/ Tungsten Horizontal Reveal			
						~Laminate	HP LAM			
						O1	HP			
						BRC	Brushed Cobalt			
						O2	HP			
						ACJ	Absolute Acajou			
						I1	HP			
						BRC	Brushed Cobalt			
						I2	HP			
						DWT	Designer White			

C:\Users\josbirn\Desktop\childrens trust G20778\G20944 CHILDREN'S TRUST OF ALACHUA - additional 3 stations.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

CHILDREN'S TRUST OF ALACHUA
ADDITIONAL STATIONS - Option 1 & 2
PROPOSAL #G20944
STATE OF FLORIDA CONTRACT #425-001-12-1

Item	Mfg	Cat	Alias 3	Contract	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
23	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	4	EVPH2S4236	42" h x 36" w, Laminate Panel, Double Sided	\$ 281.42	\$ 1,125.68	61.000
						~STD	Standard Paint Options			
						~STD	Panels w/ Matching Horizontal Reveal			
						TUN	Tungsten w/ Tungsten Horizontal Reveal			
						~Laminate	HP LAM			
						O1	HP			
						BRC	Brushed Cobalt			
						O2	HP			
						DWT	Designer White			
						I1	HP			
						BRC	Brushed Cobalt			
						I2	HP			
						DWT	Designer White			
24	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	5	EVPH2S6636	66" h x 36" w, Laminate Panel, Double Sided	\$ 422.14	\$ 2,110.70	61.000
						~STD	Standard Paint Options			
						~STD	Panels w/ Matching Horizontal Reveal			
						TUN	Tungsten w/ Tungsten Horizontal Reveal			
						~Laminate	HP LAM			
						O1	HP			
						BRC	Brushed Cobalt			
						O2	HP			
						ACJ	Absolute Acajou			
						O3	HP			
						BRC	Brushed Cobalt			
						I1	HP			
						BRC	Brushed Cobalt			
						I2	HP			
						DWT	Designer White			
						I3	HP			
						BRC	Brushed Cobalt			
25	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	7	EVPI66	66" h, Inline Panel Connector, Includes Post & Hardware, No Trim	\$ 30.03	\$ 210.21	61.000
						~STD	Standard Paint Options			
						~STD	Inline Connectors (Use w/ Matching Horizont...			
						TUN	Tungsten Inline (Use w/ Matching Horizontal ...			

C:\Users\josbirn\Desktop\childrens trust G20778\G20944 CHILDREN'S TRUST OF ALACHUA - additional 3 stations.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

CHILDREN'S TRUST OF ALACHUA
ADDITIONAL STATIONS - Option 1 & 2
PROPOSAL #G20944
STATE OF FLORIDA CONTRACT #425-001-12-1

Item	Mfg	Cat	Alias 3	Contract	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
26	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVS1219BFLCM	19" d x 24.125" h, B/F w/ 60 mm castors, Mobile	\$ 236.38	\$ 709.14	61.000
	✓					~STD TUN	Standard Paint Colors Tungsten			
27	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVS1223FF	23" d x 15" w x 27.75" h, F/F Pedestal, Freestanding or Worksurface Supporting, 1200 Series	\$ 197.77	\$ 593.31	61.000
	✓					~STD TUN	Standard Paint Colors Tungsten			
28	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVSODSGDL1336	22.4" h x 36" w, Double Wall Overhead w/Sliding Glass Doors, Shelf, Lockable, Frosted Glass Only	\$ 297.30	\$ 891.90	61.000
	✓					~STD TUN	Standard Paint Colors Tungsten			
29	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	3	EVWCC3624	24" d x 36" w, Curved Corner Worksurface, 3mm PVC Edge Trim	\$ 149.76	\$ 449.28	61.000
	✓					~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			
30	EVO	EFG	LAYOUT OPTION 2 - 3 STATIONS	STATE	6	EVWS2436	24" d x 36" w, Straight Rectangular Worksurface with Scoops, 3mm PVC Edge Trim	\$ 48.75	\$ 292.50	61.000
	✓					~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			
31	ERC	ERC	LAYOUT OPTION 2 - 3 STATIONS		1	SUBC	LABOR TO RECEIVE, DELIVER AND INSTALL PRODUCTS DURING NORMAL BUSINESS HOURS.	\$ 1,250.00	\$ 1,250.00	0.000
	ⓘ									
							Grand Total		\$ 16,903.57	59.702

C:\Users\josbirn\Desktop\childrens trust G20778\G20944 CHILDREN'S TRUST OF ALACHUA - additional 3 stations.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

1 OF 11
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
1	SIT	SIT	BREAK	4	1011FT1.PS	Lumin, Four-Leg Chair, Plastic Seat & Back, Armless	\$ 101.16	\$ 404.64	64.000
					FC2	Silver Frame			
					GL1	Standard Multi-Surface Glide			
					~	No Tablet Upgrade			
					SC8	Slate			
					~	No Selection			
					~	Std Packaging			
2	GLB	GCU	BREAK	1	GRB22	22" Dia x 28"h, Round Base, Seated Height, Plate Base w/ 3" Dia x 27.5"h Column, Fully Assembled, 1/2" Adj. Glides, Use w/ Either GxBTP24,30,36, GRxxNTP or GRxxTP Tops, SWAP, TABLES	\$ 225.72	\$ 225.72	62.000
					~SBASE	SWAP Base Finishes			
					TUN	1-Tungsten			
3	GLB	GCU	BREAK	1	GRBTP36	36" Dia x 1"h, Round, Top Only, 1 Base Required, Use w/ Either GRB22, GRB22H25, GRB22H35, GRB22H41 or GSB19, GSB19H25, GSB19H35, GSB19H41 Base, SWAP, TABLES	\$ 96.90	\$ 96.90	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~SLAM	SWAP Laminate Top Finishes			
					DWT	1-Designer White			
					~	Power Block Cut-Out Not Required- Center Postion			
sub			BREAK			BREAK Subtotal		\$ 727.26	63.139
4	HMG	HGC	OFFICE 1	1	AER1B23DW	+Work Chair,New Aeron,B Size,Std-Hgt Range Adj,Tit Lim and Seat Angle,Fully Adj Arms,Non-Uphst Armpads	\$ 736.63	\$ 736.63	64.500
					ALP	+adjustable posturefit SL			
					VPR	+mineral			
					SNA	+satin aluminum			
					SNA	+satin aluminum			
					C7	+2 1/2" caster, black yoke, hard floors or carpet			
					DVP	+dark mineral			
					231	+8Z Pellicle-Pr Cat 1			
					01	+8Z Pellicle mineral			
5	GLB	GCU	OFFICE 1	1	GRB22	22" Dia x 28"h, Round Base, Seated Height, Plate Base w/ 3" Dia x 27.5"h Column, Fully Assembled, 1/2" Adj. Glides, Use w/ Either GxBTP24,30,36, GRxxNTP or GRxxTP Tops, SWAP, TABLES	\$ 225.72	\$ 225.72	62.000
					~SBASE	SWAP Base Finishes			
					TUN	1-Tungsten			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
6	GLB	GCU	OFFICE 1	1	GRBTP36	36" Dia x 1"h, Round, Top Only, 1 Base Required, Use w/ Either GRB22, GRB22H25, GRB22H35, GRB22H41 or GSB19, GSB19H25, GSB19H35, GSB19H41 Base, SWAP, TABLES (STD) Thermally Fused Laminate, High Performance (1" Thick) SWAP Laminate Top Finishes 1-Absolute Acajou Power Block Cut-Out Not Required- Center Position	\$ 96.90	\$ 96.90	62.000
7	HMG	HGC	OFFICE 1	4	PIA4S1SP	+Verus Side Chair, 4-Leg Base, 4-leg base, Interweave 2 suspension back, fixed arms, not fire retardant +mineral +satin aluminum +iceberg +glide, carpet only @aristo-Pr Cat 2 +aristo green apple	\$ 181.50	\$ 726.00	63.700
8	GLB	GCU	OFFICE 1	1	Z16L2ES	23.4"d x 16"w x 28.5"h, Storage Shell w/2 File Drawers, ZIRA -ZBSE ACJ -HAN HQ K-STD Zira Storage Base Finishes 1-Absolute Acajou Handle Option (Required) P-Bar Handle - Silver C-Key Random (STD)	\$ 224.58	\$ 224.58	62.000
9	GLB	GCU	OFFICE 1	1	Z2448EL	24"d x 48"w x 29.5"h, Left Flush Return w/No Pedestal, ZIRA (STD) Thermally Fused Laminate, High Performance (1" Thick) Zira Top Finishes 1-Absolute Acajou F-1" Top, Standard Edge Zira Chassis Finishes 2-Absolute Acajou M-Full to Floor Modesty Panel Grommet/Electrical Not Required - Left Position Grommet Cover (Black), Cut-Out 3.25" x 1.875" - (STD) Center Position Grommet/Electrical Not Required - Right Position Grommet/Electrical Not Required - Custom Grommet Location	\$ 198.74	\$ 198.74	62.000

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4
PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.
CLIENT SIGNATURE:
DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

3 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
10	GLB	GCU	OFFICE 1	1	Z2472SCSC	24"d x 72"w x 29.5"h, Storage Cabinet Credenza, 2 Storage Cabinets Side by Side, Locking, ZIRA	\$ 625.11	\$ 625.11	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					~ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					~	Laminate Doors (STD)			
					~HAN	Handle Option (Required)			
					HQ	P-Bar Handle - Silver			
					K-401	C-Keyed for Lock #401			
					~	Grommet/Electrical Not Required - Custom Grommet Location			
11	GLB	GCU	OFFICE 1	1	Z3072F3R	29.69"d x 72"w x 29.5"h, Single Pedestal, Rectangular Top Desk, Box/Box/File Right, Faux Pedestal Left, Hutches Cannot be Used on Desk, ZIRA	\$ 555.56	\$ 555.56	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					~ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					~	Laminate Full to Floor Modesty (STD)			
					~	Handle Option			
					HQ	M-Bar Handle - Silver			
					SI	M-Silver Lock			
					K-401	C-Keyed for Lock #401			
					~POS1	Grommet/Electrical Cut-Out Options - Left Position			
					AG1	M-Grommet Cover (Black), Cut-Out 3.25" x 1.875" (Accepts Global Monitor Arms)			
					~	Grommet/Electrical Not Required - Center Position			
					~	Grommet/Electrical Not Required - Right Position			
					~	Grommet/Electrical Not Required - Custom Grommet Location			
sub			OFFICE 1			OFFICE 1 Subtotal		\$ 3,389.24	62.939

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4
PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.
CLIENT SIGNATURE:
DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

4 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
12	HMG	HGC	OFFICE 2	1	AER1B23DW	+Work Chair, New Aeron, B Size, Std-Hgt Range Adj, Tit Lim and Seat Angle, Fully Adj Arms, Non-Upst Armpads	\$ 736.63	\$ 736.63	64.500
					ALP	+adjustable posturefit SL			
					VPR	+mineral			
					SNA	+satin aluminum			
					SNA	+satin aluminum			
					C7	+2 1/2" caster, black yoke, hard floors or carpet			
					DVP	+dark mineral			
					231	+8Z Pellicle-Pr Cat 1			
					01	+8Z Pellicle mineral			
13	HMG	HGC	OFFICE 2	2	PIA4S1SP	+Verus Side Chair, 4-Leg Base, 4-leg base, Interweave 2 suspension back, fixed arms, not fire retardant	\$ 181.50	\$ 363.00	63.700
					VPR	+mineral			
					SNA	+satin aluminum			
					36501	+iceberg			
					G4	+glide, carpet only			
					3AR	@aristo-Pr Cat 2			
					08	+aristo green apple			
14	GLB	GCU	OFFICE 2	1	Z16L2ES	23.4"d x 16"w x 28.5"h, Storage Shell w/2 File Drawers, ZIRA	\$ 224.58	\$ 224.58	62.000
					-ZBSE	Zira Storage Base Finishes			
					ACJ	1-Absolute Acajou			
					-HAN	Handle Option (Required)			
					HQ	P-Bar Handle - Silver			
					K-STD	C-Key Random (STD)			
15	GLB	GCU	OFFICE 2	1	Z2448ER	24"d x 48"w x 29.5"h, Right Flush Return w/No Pedestal, ZIRA	\$ 198.74	\$ 198.74	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					-ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					-ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					~	M-Full to Floor Modesty Panel			
					~	Grommet/Electrical Not Required - Left Position			
					~	Grommet Cover (Black), Cut-Out 3.25" x 1.875" - (STD) Center Position			
					~	Grommet/Electrical Not Required - Right Position			
					~	Grommet/Electrical Not Required - Custom Grommet Location			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

5 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
16	GLB	GCU	OFFICE 2	1	Z3072F3L	29.69"d x 72"w x 29.5"h, Single Pedestal, Rectangular Top Desk, Box/Box/File Left, Faux Pedestal Right, Hutches Cannot be Used on Desk, ZIRA	\$ 555.56	\$ 555.56	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					~ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					~	Laminate Full to Floor Modesty (STD)			
					~	Handle Option			
					HQ	M-Bar Handle - Silver			
					SI	M-Silver Lock			
					K-STD	C-Key Random (STD)			
					~	Grommet/Electrical Not Required - Left Position			
					~	Grommet/Electrical Not Required - Center Position			
					~POS3	Grommet/Electrical Cut-Out Options - Right Position			
					AG3	M-Grommet Cover (Black), Cut-Out 3.25" x 1.875" (Accepts Global Monitor Arms)			
					~	Grommet/Electrical Not Required - Custom Grommet Location			
sub			OFFICE 2			OFFICE 2 Subtotal		\$ 2,078.51	63.219
17	HMG	HGC	OFFICE 3	1	AER1B23DW	+Work Chair, New Aeron, B Size, Std-Hgt Range Adj, Tilt Lim and Seat Angle, Fully Adj Arms, Non-Uphst Armpads	\$ 736.63	\$ 736.63	64.500
					ALP	+adjustable posturefit SL			
					VPR	+mineral			
					SNA	+satin aluminum			
					SNA	+satin aluminum			
					C7	+2 1/2" caster, black yoke, hard floors or carpet			
					DVP	+dark mineral			
					231	+8Z Pellicle-Pr Cat 1			
					01	+8Z Pellicle mineral			
18	HMG	HGC	OFFICE 3	2	PIA4S1SP	+Verus Side Chair, 4-Leg Base, 4-leg base, Interweave 2 suspension back, fixed arms, not fire retardant	\$ 181.50	\$ 363.00	63.700
					VPR	+mineral			
					SNA	+satin aluminum			
					36501	+iceberg			
					G4	+glide, carpet only			
					3AR	@aristo-Pr Cat 2			
					08	+aristo green apple			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

6 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
19	GLB	GCU	OFFICE 3	1	Z16L2ES	23.4"d x 16"w x 28.5"h, Storage Shell w/2 File Drawers, ZIRA	\$ 224.58	\$ 224.58	62.000
					~ZBSE	Zira Storage Base Finishes			
					ACJ	1-Absolute Acajou			
					~HAN	Handle Option (Required)			
					HQ	P-Bar Handle - Silver			
					K-STD	C-Key Random (STD)			
20	GLB	GCU	OFFICE 3	1	Z2448EL	24"d x 48"w x 29.5"h, Left Flush Return w/No Pedestal, ZIRA	\$ 198.74	\$ 198.74	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					~ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					~	M-Full to Floor Modesty Panel			
					~	Grommet/Electrical Not Required - Left Position			
					~	Grommet Cover (Black), Cut-Out 3.25" x 1.875" - (STD) Center Position			
					~	Grommet/Electrical Not Required - Right Position			
					~	Grommet/Electrical Not Required - Custom Grommet Location			
21	GLB	GCU	OFFICE 3	1	Z3072F3R	29.69"d x 72"w x 29.5"h, Single Pedestal, Rectangular Top Desk, Box/Box/File Right, Faux Pedestal Left, Hutches Cannot be Used on Desk, ZIRA	\$ 555.56	\$ 555.56	62.000
					~	(STD) Thermally Fused Laminate, High Performance (1" Thick)			
					~ZTOP	Zira Top Finishes			
					ACJ	1-Absolute Acajou			
					~ZCHASS	Zira Chassis Finishes			
					ACJ	2-Absolute Acajou			
					A3	F-1" Top, Standard Edge			
					~	Laminate Full to Floor Modesty (STD)			
					~	Handle Option			
					HQ	M-Bar Handle - Silver			
					SI	M-Silver Lock			
					K-STD	C-Key Random (STD)			
					~POS1	Grommet/Electrical Cut-Out Options - Left Position			
					AG1	M-Grommet Cover (Black), Cut-Out 3.25" x 1.875" (Accepts Global Monitor Arms)			
					~	Grommet/Electrical Not Required - Center Position			
					~	Grommet/Electrical Not Required - Right Position			
					~	Grommet/Electrical Not Required - Custom Grommet Location			
sub			OFFICE 3			OFFICE 3 Subtotal		\$ 2,078.51	63.219

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

7 OF 11
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
22	HMG	HGC	OPEN OFFICE	5	AER1B23DW	+Work Chair,New Aeron,B Size,Std-Hgt Range Adj,Tit Lim and Seat Angle,Fully Adj Arms,Non-Uphst Armpads	\$ 736.63	\$ 3,683.15	64.500
					ALP	+adjustable posturefit SL			
					VPR	+mineral			
					SNA	+satin aluminum			
					SNA	+satin aluminum			
					C7	+2 1/2" caster, black yoke, hard floors or carpet			
					DVP	+dark mineral			
					231	+8Z Pellicle-Pr Cat 1			
					01	+8Z Pellicle mineral			
23	EVO	EFG	OPEN OFFICE	20	EVCLVAR	Single Clamp (Fixed and Variable Height Posts)	\$ 2.66	\$ 53.20	62.000
24	EVO	EFG	OPEN OFFICE	5	EVCUSHION15X19X1	15"w x 19"d x 1"h, Pedestal Seat Cushion, Cushions are for use on EVS12xxBFLCM Mobile Pedestals Only	\$ 79.80	\$ 399.00	62.000
					-GR04	Grade 04			
					-GPM4	Graded In Grade 04 Fabrics			
					GPM4	Graded In Grade 04 Fabrics			
					TOR	CLFR, ENVIROLEATHER CALIFORNIA, COLOR: LAGOON CF81			
25	EVO	EFG	OPEN OFFICE	4	EVE8CP16	16" - Jumper Cable, Panel to Panel	\$ 36.10	\$ 144.40	62.000
26	EVO	EFG	OPEN OFFICE	4	EVE8CP20	20" - Jumper Cable, Panel-Post-Panel	\$ 41.80	\$ 167.20	62.000
27	EVO	EFG	OPEN OFFICE	1	EVE8FR1	72" Long, Reversible Floor Power Entry	\$ 101.08	\$ 101.08	62.000
28	EVO	EFG	OPEN OFFICE	1	EVE8PD24	24", Power Distribution Housing	\$ 43.32	\$ 43.32	62.000
29	EVO	EFG	OPEN OFFICE	10	EVE8PD36	36", Power Distribution Housing	\$ 61.94	\$ 619.40	62.000
30	EVO	EFG	OPEN OFFICE	5	EVE8RD1WHT	#1 Utility Circuit, Duplex Receptacle, White	\$ 10.26	\$ 51.30	62.000
31	EVO	EFG	OPEN OFFICE	5	EVE8RD2WHT	#2 Utility Circuit, Duplex Receptacle, White	\$ 10.26	\$ 51.30	62.000

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

8 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
32	EVO	EFG	OPEN OFFICE	5	EVE8RDAWHT	A, Dedicated Circuit, Duplex Receptacle, White	\$ 10.26	\$ 51.30	62.000
33	EVO	EFG	OPEN OFFICE	5	EVE8RDBWHT	B, Dedicated Circuit, Duplex Receptacle, White	\$ 10.26	\$ 51.30	62.000
34	EVO	EFG	OPEN OFFICE	5	EVHC18L	18", Left, Single Cantilever	\$ 31.77	\$ 158.85	62.000
					~STD TUN	Standard Paint Colors Tungsten			
35	EVO	EFG	OPEN OFFICE	5	EVHC18R	18", Right, Single Cantilever	\$ 31.77	\$ 158.85	62.000
					~STD TUN	Standard Paint Colors Tungsten			
36	EVO	EFG	OPEN OFFICE	5	EVHC24L	24", Left, Single Cantilever	\$ 36.37	\$ 181.85	62.000
					~STD TUN	Standard Paint Colors Tungsten			
37	EVO	EFG	OPEN OFFICE	5	EVHCB2	Corner Brackets Left and Right (Pair)	\$ 8.78	\$ 43.90	62.000
					~STD TUN	Standard Paint Colors Tungsten			
38	EVO	EFG	OPEN OFFICE	10	EVHFB1	Flat bracket (Available in Black Only)	\$ 4.94	\$ 49.40	62.000
39	EVO	EFG	OPEN OFFICE	5	EVHPB1	Pedestal Bracket	\$ 10.03	\$ 50.15	62.000
					~STD TUN	Standard Paint Colors Tungsten			
40	EVO	EFG	OPEN OFFICE	1	EVPCPA242	42"h, 2 Way Post, Includes Post, Hardware & Aluminum Trims	\$ 61.03	\$ 61.03	62.000
					~STD ~STD TUN	Standard Paint Colors Connectors w/ Matching Inlines (Use w/ Matching Horizontal Reveal) Tungsten w/ Tungsten Inlines			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

9 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
41	EVO	EFG	OPEN OFFICE	7	EVPCPA266	66"h, 2 Way Post, Includes Post, Hardware & Aluminum Trims	\$ 89.45	\$ 626.15	62.000
					~STD	Standard Paint Colors			
					~STD	Connectors w/ Matching Inlines (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten w/ Tungsten Inlines			
42	EVO	EFG	OPEN OFFICE	4	EVPCPA366	66"h, 3 Way Post, Includes Post, Hardware & Aluminum Trims	\$ 116.20	\$ 464.80	62.000
					~STD	Standard Paint Colors			
					~STD	Connectors w/ Matching Inlines (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten w/ Tungsten Inlines			
43	EVO	EFG	OPEN OFFICE	1	EVPERA42	42"h, End of Run Post, Includes Post, Hardware & Aluminum Trim	\$ 29.26	\$ 29.26	62.000
					~STD	Standard Paint Colors			
					~STD	Connectors w/ Matching Inlines (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten w/ Tungsten Inlines			
44	EVO	EFG	OPEN OFFICE	5	EVPERA66	66"h, End of Run Post, Includes Post, Hardware & Aluminum Trim	\$ 39.71	\$ 198.55	62.000
					~STD	Standard Paint Colors			
					~STD	Connectors w/ Matching Inlines (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten w/ Tungsten Inlines			
45	EVO	EFG	OPEN OFFICE	17	EVPGTE2436	24"h x 36"w, Tempered Glass Extension Module	\$ 188.94	\$ 3,211.98	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Glazing	Glass Modules			
					I1	GT			
					CLR	Clear			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

10 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
46	EVO	EFG	OPEN OFFICE	12	EVPH2S4236	42"h x 36"w, Laminate Panel, Double Sided	\$ 274.21	\$ 3,290.52	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Laminate	HP LAM			
					O1	HP			
					BRC	Brushed Cobalt			
					O2	HP			
					ACJ	Absolute Acajou			
					I1	HP			
					BRC	Brushed Cobalt			
					I2	HP			
					DWT	Designer White			
47	EVO	EFG	OPEN OFFICE	7	EVPH2S4236	42"h x 36"w, Laminate Panel, Double Sided	\$ 274.21	\$ 1,919.47	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Laminate	HP LAM			
					O1	HP			
					BRC	Brushed Cobalt			
					O2	HP			
					DWT	Designer White			
					I1	HP			
					BRC	Brushed Cobalt			
					I2	HP			
					DWT	Designer White			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4
PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.
CLIENT SIGNATURE:
DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

11 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
48	EVO	EFG	OPEN OFFICE	1	EVPH2S6624	66"h x 24"w, Laminate Panel, Double Sided	\$ 299.29	\$ 299.29	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Laminate	HP LAM			
					O1	HP			
					BRC	Brushed Cobalt			
					O2	HP			
					ACJ	Absolute Acajou			
					O3	HP			
					BRC	Brushed Cobalt			
					I1	HP			
					BRC	Brushed Cobalt			
					I2	HP			
					DWT	Designer White			
					I3	HP			
					BRC	Brushed Cobalt			
49	EVO	EFG	OPEN OFFICE	2	EVPH2S6636	66"h x 36"w, Laminate Panel, Double Sided	\$ 411.31	\$ 822.62	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Laminate	HP LAM			
					O1	HP			
					BRC	Brushed Cobalt			
					O2	HP			
					ACJ	Absolute Acajou			
					O3	HP			
					BRC	Brushed Cobalt			
					I1	HP			
					BRC	Brushed Cobalt			
					I2	HP			
					DWT	Designer White			
					I3	HP			
					BRC	Brushed Cobalt			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

12 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
50	EVO	EFG	OPEN OFFICE	4	EVPH2S6636	66"h x 36"w, Laminate Panel, Double Sided	\$ 411.31	\$ 1,645.24	62.000
					~STD	Standard Paint Options			
					~STD	Panels w/ Matching Horizontal Reveal			
					TUN	Tungsten w/ Tungsten Horizontal Reveal			
					~Laminate	HP LAM			
					O1	HP			
					BRC	Brushed Cobalt			
					O2	HP			
					DWT	Designer White			
					O3	HP			
					BRC	Brushed Cobalt			
					I1	HP			
					BRC	Brushed Cobalt			
					I2	HP			
					DWT	Designer White			
					I3	HP			
					BRC	Brushed Cobalt			
51	EVO	EFG	OPEN OFFICE	1	EVPI42	42"h, Inline Panel Connector, Includes Post & Hardware, No Trim	\$ 24.66	\$ 24.66	62.000
					~STD	Standard Paint Options			
					~STD	Inline Connectors (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten Inline (Use w/ Matching Horizontal Reveal)			
52	EVO	EFG	OPEN OFFICE	8	EVPI66	66"h, Inline Panel Connector, Includes Post & Hardware, No Trim	\$ 29.26	\$ 234.08	62.000
					~STD	Standard Paint Options			
					~STD	Inline Connectors (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten Inline (Use w/ Matching Horizontal Reveal)			
53	EVO	EFG	OPEN OFFICE	1	EVPTVA24	24"h, Variable Height Aluminum Trim, With End of Run Top Cap	\$ 13.38	\$ 13.38	62.000
					~STD	Standard Paint Colors			
					TUN	Tungsten			
54	EVO	EFG	OPEN OFFICE	1	EVPIVC66	66"h, Inline Variable Height Panel Connector, Includes Post & Hardware	\$ 29.68	\$ 29.68	62.000
					~STD	Standard Paint Options			
					~STD	Inline Connectors (Use w/ Matching Horizontal Reveal)			
					TUN	Tungsten Inline (Use w/ Matching Horizontal Reveal)			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
55	EVO	EFG	OPEN OFFICE	1	EVPVTFEA24	24"h, Vertical Flat Extension Aluminum Trim Only	\$ 4.60	\$ 4.60	62.000
	✓				~STD TUN	Standard Paint Colors Tungsten			
56	EVO	EFG	OPEN OFFICE	5	EVS1219BFLCM	19"d x 24.125"h, B/F w/ 60 mm castors, Mobile	\$ 230.32	\$ 1,151.60	62.000
	✓				~STD TUN	Standard Paint Colors Tungsten			
57	EVO	EFG	OPEN OFFICE	5	EVS1223FF	23"d x 15"w x 27.75"h, F/F Pedestal, Freestanding or Worksurface Supporting, 1200 Series	\$ 192.70	\$ 963.50	62.000
	✓				~STD TUN	Standard Paint Colors Tungsten			
58	EVO	EFG	OPEN OFFICE	5	EVSODSGDL1336	22.4"h x 36"w, Double Wall Overhead w/Sliding Glass Doors, Shelf, Lockable, Frosted Glass Only	\$ 289.67	\$ 1,448.35	62.000
	✓				~STD TUN	Standard Paint Colors Tungsten			
59	EVO	EFG	OPEN OFFICE	5	EVWCC3624	24"d x 36"w, Curved Corner Worksurface, 3mm PVC Edge Trim	\$ 145.92	\$ 729.60	62.000
	✓				~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			
60	EVO	EFG	OPEN OFFICE	9	EVWS2436	24"d x 36"w, Straight Rectangular Worksurface with Scoops, 3mm PVC Edge Trim	\$ 47.50	\$ 427.50	62.000
	✓				~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			
61	EVO	EFG	OPEN OFFICE	1	EVWSP2439	24"d x 39"w, Span a Post, Straight Rectangular Worksurface with Scoops, 3mm PVC Edge Trim	\$ 82.46	\$ 82.46	62.000
	✓				~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			
62	EVO	EFG	OPEN OFFICE	1	EVWTEV1536	15"d x 36"w, End Transaction Top w/ Cut-Out, Use at Variable Height Inline, 3mm PVC Edge Trim	\$ 45.60	\$ 45.60	62.000
	✓				~TF ACJ TUN	Thermally Fused Laminates (1" Thickness) Absolute Acajou Tungsten			

C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS

Office Environments
1211 Governors Square Boulevard
Suite 100
Tallahassee, FL 32301
850-241-1750

CHILDREN'S TRUST OF ALACHUA
REVISED PRICING
PROPOSAL #G20778
STATE OF FLORIDA CONTRACT

14 OF 14
05/19/20 04:31 PM
Item 5.

Item	Mfg	Cat	Alias 3	Qty	Part Number	Part Description	Sell	Ext Sell	Sell - %
sub			OPEN OFFICE			OPEN OFFICE Subtotal		\$ 23,782.87	62.410
63	GLB	GUS	RECEPTION	4	8032	DRIFT, Side Chair, Fully Upholstered w/ 4 Legged Polished Chrome Swivel Base, GLOBAL SEATING USA	\$ 539.60	\$ 2,158.40	62.000
					-03 -COU4 CE75	Grade 03 Couture (Global) 1-Neptune			
64	GLB	GCU	RECEPTION	1	GRB22H21	22" Dia x 21"h, Round Base, End Table Height, Plate Base w/ 3"Dia x 21"h Column, Fully Assembled, 1/2" Adj. Glides, Use w/ Either, GRBTPxx or GSBTPxx Tops, SWAP, TABLES	\$ 255.74	\$ 255.74	62.000
					-SBASE TUN	Swap Base Finishes 1-Tungsten			
65	GLB	GCU	RECEPTION	1	GRBTP24	24" Dia x 1"h, Round, Top Only, 1 Base Required, Use w/ Either GRB22, GRB22H25, GRB22H35, GRB22H41 or GSB19, GSB19H25, GSB19H35, GSB19H41 Base, SWAP, TABLES	\$ 65.36	\$ 65.36	62.000
					~ ~SLAM ACJ ~	(STD) Thermally Fused Laminate, High Performance (1" Thick) SWAP Laminate Top Finishes 1-Absolute Acajou Power Block Cut-Out Not Required- Center Postion			
sub			RECEPTION			RECEPTION Subtotal		\$ 2,479.50	62.000
66	ERC	ERC	zINSTALL	1	SUBC	LABOR TO RECEIVE, DELIVER AND INSTALL PRODUCTS DURING NORMAL BUSINESS HOURS.	\$ 6,075.00	\$ 6,075.00	0.000
sub			zINSTALL			zINSTALL Subtotal		\$ 6,075.00	0.000
						Grand Total		\$ 40,610.89	58.682

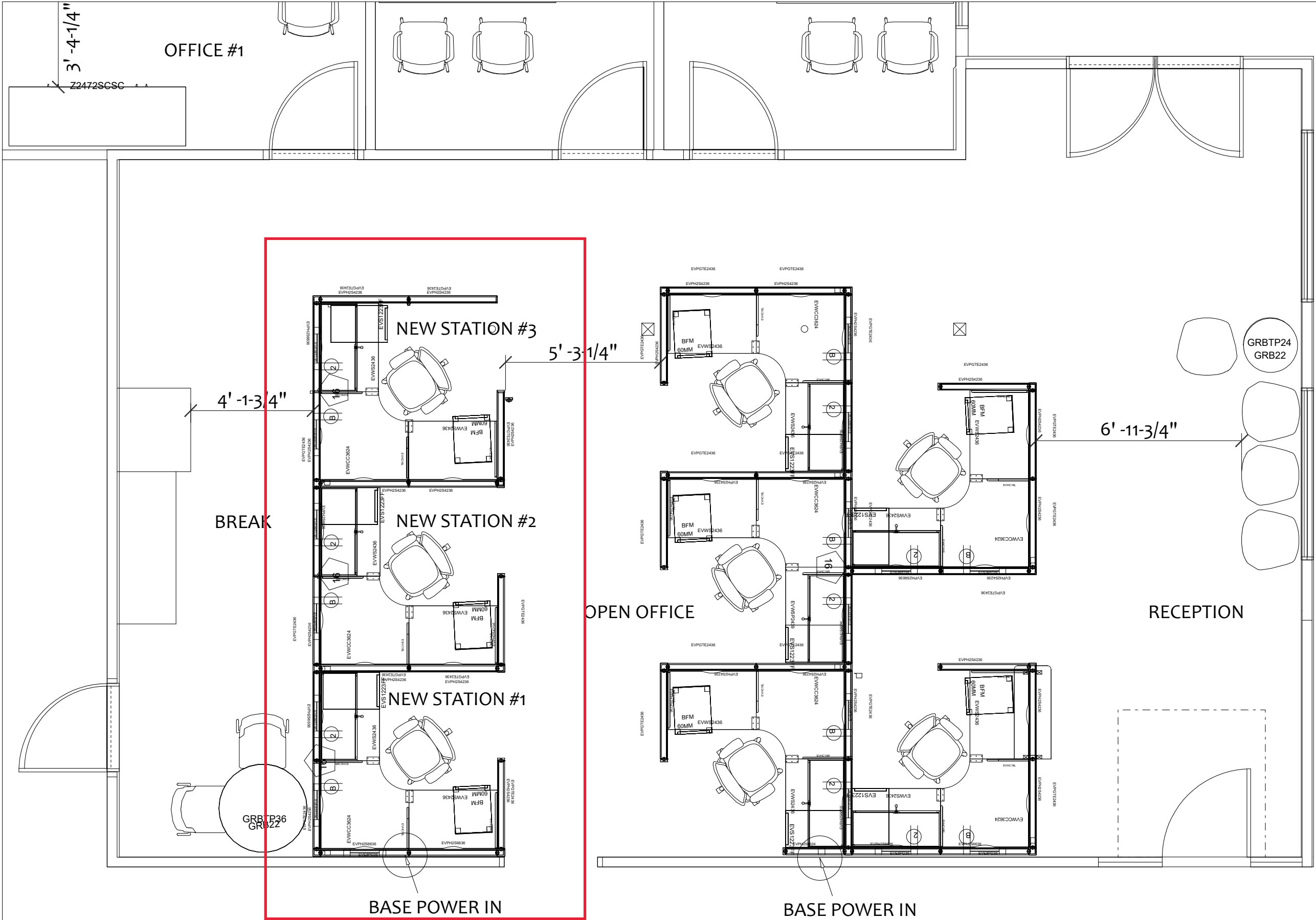
C:\Users\josbirn\Desktop\childrens trust G20778\G20778 CHILDREN'S TRUST OF ALACHUA 5.19.20 proposal.sp4

PLEASE NOTE THAT APPLICABLE TAXES ARE NOT INCLUDED WILL BE ADDED TO FINAL INVOICE.

CLIENT SIGNATURE:

DATE:

*PRICING GOOD FOR 30 DAYS



LAYOUT OPTION 2



Item 5.

officeenvironments
237 SW 7th Terrace
Suite B
Gainesville, FL 32601

P: 352.224.5161

www.officenvironments.com

**HermanMiller**
certified dealer

CLIENT APPROVAL

I HAVE REVIEWED THESE PLANS AND THEY CONFORM TO OUR REQUIREMENTS. I UNDERSTAND THAT ANY MODIFICATIONS TO THESE PLANS WILL RESULT IN ADDITIONAL CHARGES.

☐ APPROVED AS DRAWN
☐ APPROVED AS NOTED
☐ NOT APPROVED

SIGNATURE: _____
DATE: _____
THE GRAPHIC MATERIAL AND DESIGN CONCEPTS ON THIS PAGE REPRESENT THE DESIGNER'S PRELIMINARY DESIGN. REPRODUCTION OF THE MATERIAL AND DESIGN CONTAINED HEREIN IS PROHIBITED WITHOUT WRITTEN CONSENT OF OFFICE ENVIRONMENTS.
FIELD DIMENSIONS MUST BE VERIFIED PRIOR TO INSTALLATION.

CHILDREN'S TRUST OF
ALACHUA


LAYOUT OPTION 2
3 NEW STATIONS

PROPOSAL #G20778

DRAWN BY: Kim Gray

DATE: 5/27/2020

FILE PATH: ALACHUA\G20778\4 CHILDREN'S TRUST OF ALACHUA - Additional Stations.cdw



LAYOUT OPTION 2 - VIEW 1

LAYOUT OPTION 2 - VIEW 2



Item 5.

officeenvironments

237 SW 7th Terrace
Suite B
Gainesville, FL 32601

P: 352.224.5161

www.officenvironments.com

 **HermanMiller**
certified dealer

CLIENT APPROVAL

I HAVE REVIEWED THESE PLANS AND THEY CONFORM TO OUR REQUIREMENTS. I UNDERSTAND THAT ANY MODIFICATIONS TO THESE PLANS WILL RESULT IN ADDITIONAL CHARGES.

☐ APPROVED AS DRAWN
☐ APPROVED AS NOTED
☐ NOT APPROVED

SIGNATURE: _____

DATE: _____

THE GRAPHIC MATERIAL AND DESIGN CONCEPTS ON THIS PAGE ARE THE PROPERTY OF OFFICE ENVIRONMENTS. REPRODUCTION OF THE MATERIAL AND DESIGN CONTAINED HEREIN IS PROHIBITED WITHOUT WRITTEN CONSENT OF OFFICE ENVIRONMENTS. FIELD DIMENSIONS MUST BE VERIFIED PRIOR TO INSTALLATION.

CHILDREN'S TRUST OF
ALACHUA


LAYOUT OPTION 2
3 NEW STATIONS

PROPOSAL #G20778

DRAWN BY: Kim Gray

DATE: 5/27/2020

WIN2020/CHILDREN'S TRUST OF
FILE PATH-ALACHUA/G20778- CHILDREN'S TRUST OF
ALACHUA - Additional Stations.cdw



File Attachments for Item:

6. Authorization to Execute Contracts through 9/30/2021

**Item:**

Authorization to Execute Contracts through 9/30/2021

Requested Action:

The Trust is asked to authorize the Executive Director to execute the agreements in the attached Exhibit through September 30, 2021

Background

The contracts in the attached exhibit were awarded via RFP 20-937. Section 2.9 of the RFP permits agencies to request a no-cost extension through September 30, 2021. Those requests are due back to the Trust by August 3, 2020.

The contract status report lists several contracts that have yet to be executed. If those agencies wish to execute those agreements and if those services can be provided in FY21, the Executive Director would like to execute those agreements through September 30, 2021. This approval would streamline the contracting process.

Attachments

Contract Status Report

Programmatic Impact:

NA

Fiscal Impact:

Carry forward of funding into FY21

Recommendation:

Staff recommends approval

Contract Search Results - 7/28/2020 1:12:45 PM UTC

Contract Title	Effective Date	Expiration Date	StatusName	Contract Amount
2020 CTAC Agreement with United Way Family Literacy	3/1/2020	9/30/2020	Active	5812
2020 CTAC Agreement with Girls on the Run of Alachua County	3/1/2020	9/30/2020	Active	7007
#11542 2020 CTAC Agreement United Church of Gainesville Food4Kids Backpack Program	3/1/2020	9/30/2020	Active	8900
2020 CTAC Agreement with Junior Achievement of Tampa Bay	3/1/2020	9/30/2020	Active	10000
2020 CTAC Agreement with Florida Organic Growers	3/1/2020	9/30/2020	Active	11704
2020 CTAC Agreement with Black on Black Crime Task Force	3/1/2020	9/30/2020	Active	14000
2020 CTAC Agreement with COG Parks Skybridge	3/1/2020	9/30/2020	Active	14802
2020 CTAC Agreement with Children Beyond Our Borders	3/1/2020	9/30/2020	Active	14909
2020 CTAC Agreement with University of Florida College of Nursing Faculty Practice Association, Inc.	3/1/2020	9/30/2020	Active	15569
2020 CTAC Agreement with COG Parks Summer Camp Expansion	3/1/2020	9/30/2020	Active	19302
2020 CTAC Agreement with River Phoenix Center for Peacebuilding	3/1/2020	9/30/2020	Active	19500
2020 CTAC Agreement with Girls Place Inc. Transportation Collab	3/1/2020	9/30/2020	Active	19592
#11553 2020 CTAC Agreement with University of Florida Reach Out	3/1/2020	9/30/2020	Active	20824
2020 CTAC Agreement with Girls Place Inc ACHIEVE	3/1/2020	9/30/2020	Active	22403
11556 2020 CTAC Agreement with Manhood Youth Development Foundation Inc.	3/1/2020	9/30/2020	Active	22500
2020 CTAC Agreement with Gainesville Area Tennis Association Inc dba Aces In Motion Capacity Building	3/1/2020	9/30/2020	Active	24250
2020 CTAC Agreement with Planned Parenthood of South Florida and the Treasure Coast, Inc. dba Planned Parenthood of South, East and North Florida	3/1/2020	9/30/2020	Active	25000
#11560 2020 CTAC Agreement with Peaceful Paths, Inc	3/1/2020	9/30/2020	Active	27500
2020 CTAC Agreement with Gainesville Area Community Tennis Association Inc dba Aces In Motion Fit Lite	3/1/2020	9/30/2020	Active	28266
2020 CTAC Agreement with Big Brothers Big Sisters of Tampa Bay Inc.	3/1/2020	9/30/2020	Active	29554
2020 CTAC Agreement with Renaissance Jax Inc dba Swampbots FTC 10497	3/1/2020	9/30/2020	Active	31380
CTAC 2020 Agreement with Boys and Girls Clubs of Northeast Florida, Inc.	3/1/2020	9/30/2020	Active	36000
2020 CTAC Agreement with United Way BOOST Project	3/1/2020	9/30/2020	Active	36060
2020 CTAC Agreement with National Alliance on Mental Illness (NAMI) Gainesville Affiliate	3/1/2020	9/30/2020	Active	38577

2020 CTAC Agreement with University of Florida Board of Trustees (For the Florida Museum of Natural History)	3/1/2020	9/30/2020	Active	40163
2020 CTAC Agreement with United Church of Gainesville Read To	3/1/2020	9/30/2020	Active	43823
2020 CTAC Agreement with Early Learning Coalition of Alachua County Inc.	3/1/2020	9/30/2020	Active	47400
2020 CTAC Agreement with Star Center Childrens Theatre	3/1/2020	9/30/2020	Active	60284
2020 CTAC Agreement with CDS Family & Behavioral Health Sciences Inc.	3/1/2020	9/30/2020	Active	65325
2020 CTAC Agreement with Kids Count In Alachua County, Inc	3/1/2020	9/30/2020	Active	66032
2020 CTAC Agreement with University of Florida College of Dentistry	3/1/2020	9/30/2020	Active	73437
2020 CTAC Agreement with Vineyard Christian Fellowship of Gainesville FL	3/1/2020	9/30/2020	Active	77690
2020 CTAC Agreement with Partners in Adolescent Lifestyle Support (PALS) THRIVE (A University of Florida Health Program)	3/1/2020	9/30/2020	Active	80275
2020 CTAC Agreement with New Technology Made Simple Now Inc	3/1/2020	9/30/2020	Active	91173
#11577 2020 CTAC Agreement with FL Institute for Workforce Innovation Inc dba Project YouthBuild	3/1/2020	9/30/2020	Active	96874
2020 CTAC Agreement with Cade Museum Foundation	3/1/2020	9/30/2020	Active	104960
2020 CTAC Agreement with Alachua County Sheriff's Office	3/1/2020	9/30/2020	Active	113995
2020 CTAC Agreement with City of Alachua	3/1/2020	9/30/2020	Active	135002
2020 CTAC Agreement with Cultural Arts Coalition			Route for Final Execution	22044
2020 CTAC Agreement with Equal Access Clinic Network			Route to Counterparty	7475
2020 CTAC Agreement with GPD HEROES			Route to Counterparty	8450
2020 CTAC Agreement with Together Gainesville			Route to Counterparty	25000
2020 CTAC Agreement with GPD RESET			Route to Counterparty	49453
2020 CTAC Agreement with PACE Center For Girls Inc.			Route to Counterparty	111832

File Attachments for Item:

7. Joint Meeting Requests

**Item:**

Joint Meeting Requests

Requested Action:

The Trust is asked to 1) approve authorizing the chair to sign the letters to the Alachua County Board of County Commissioners, the Gainesville City Commission, and the School Board of Alachua County, requesting joint meetings to discuss how to best serve the children of Alachua County, and 2) authorize staff to transmit the letters to the respective governing boards and staff, 3) present the Trust with proposed meeting dates at a future Trust meeting.

Background

At the June 29, 2020 meeting, Commissioner Cornell suggested that the Children's Trust of Alachua County conduct joint meetings with the Alachua County Board of County Commissioners, the Gainesville City Commission, and the School Board of Alachua County to discuss how to best serve the children of Alachua County.

Attachments

Letter to Chair Robert Hutchinson
Letter to Mayor Lauren Poe
Letter to Chairperson Eileen Roy

Programmatic Impact:

NA

Fiscal Impact:

NA

Recommendation:

Staff recommends approval



August 3, 2020

Robert Hutchinson, Chair
Alachua County Board of County Commissioners
12 SE 1st Street
2nd Floor
Gainesville, FL 32601

Dear Chair Hutchinson:

Given that the Trust is concluding its first fiscal year and developing its long-term funding strategy moving forward, we respectfully request that the Children's Trust of Alachua County and the Alachua County Board of County Commissioners hold a joint meeting to discuss how our respective governing bodies can best work together to meeting the needs of children and families in Alachua County.

We respectfully request a meeting date in either November, January or February, and we have instructed the Executive Director of the Children's Trust of Alachua County to reach out to the County Manager to begin the process of finding a date and time that would be agreeable to the Board. Thank you for your consideration.

Sincerely,

Lee Pinkoson
Chair, Children's Trust of Alachua County

CC: Michele Lieberman, County Manager
Alachua County Board of Commissioners
Colin Murphy, Executive Director, CTAC
Children's Trust of Alachua County Trust Members



August 3, 2020

Lauren Poe, Mayor
City of Gainesville
200 East University Avenue; Station 19
P.O. Box 490
Gainesville, FL 32627

Dear Mayor Poe:

I wanted to let you know that the Children's Trust of Alachua County received your letter dated June 1, 2020. Given that the Trust is concluding its first fiscal year and developing its long-term funding strategy moving forward, we respectfully request that the Children's Trust of Alachua County and the Gainesville City Commission hold a joint meeting to discuss how our respective governing bodies can best work together to meeting the needs of children and families in Alachua County.

We respectfully request a meeting date in either November, January or February, and we have instructed the Executive Director of the Children's Trust of Alachua County to reach out the City Manager to begin the process of finding a date and time that would be agreeable to the City Commission. Thank you for your consideration.

Sincerely,

Lee Pinkoson
Chair, Children's Trust of Alachua County

CC: Lee Feldman, Gainesville City Manager
Gainesville City Commissioners
Colin Murphy, Executive Director, CTAC
Children's Trust of Alachua County Trust Members



August 3, 2020

Eileen Roy, Board Chairperson
The School Board of Alachua County
620 E. University Avenue
Gainesville, FL 32601

Dear Chairperson Roy:

Given that the Trust is concluding its first fiscal year and developing its long-term funding strategy moving forward, we respectfully request that the Children's Trust of Alachua County and The School Board of Alachua County hold a joint meeting to discuss how our respective governing bodies can best work together to meeting the needs of children and families in Alachua County.

We respectfully request a meeting date in either November, January or February, and we have instructed the Executive Director of the Children's Trust of Alachua County to reach out to the Superintendent to begin the process of finding a date and time that would be agreeable to the Board. Thank you for your consideration.

Sincerely,

Lee Pinkoson
Chair, Children's Trust of Alachua County

CC: Karen Clarke, Superintendent
School Board of Alachua County Board Members
Colin Murphy, Executive Director, CTAC
Children's Trust of Alachua County Trust Members

File Attachments for Item:

8. 8.3.2020 Executive Director's Report



TO: MEMBERS OF THE CHILDREN'S TRUST OF ALACHUA COUNTY
FROM: COLIN MURPHY, EXECUTIVE DIRECTOR
SUBJECT: EXECUTIVE DIRECTOR'S REPORT
DATE: AUGUST 3, 2020

1. New Staff – Welcome Ashley Morgan-Daniel. Ashley will serve as the Executive Assistant/Clerk of the Trust. Part of her duties will include managing all aspects of Trust meetings including scheduling, agenda preparation, minutes, records management, and more. We are delighted Ashley chose to work with the Trust! Ashley's contact info is: Phone: 352-374-1823; email: amd@childrenstrustofalachuacounty.us

2. Office Address and Contact Information:

Children's Trust of Alachua County
 Physical Address: 802 NW 5th Avenue, Gainesville, FL 32601
 Mailing Address: P.O. Box 5669, Gainesville, FL 32627
 Main Phone: 352-374-1830
 Fax: 352-374-1831

3. Board Member Information:

- a. CTAC Policies can be viewed here:
https://ctac.municipalcodeonline.com/book?type=policies#name=1_General_Administration
- b. Information on previous CTAC meetings can be viewed here:
<https://meetings.municode.com/PublishPage/index?cid=CHLDTOACFL&ppid=47a3b2f4-5fcf-4be9-9693-5026deecbf1a&p=-1>
- c. Both of these links can be accessed via the CTAC web page found in Community Support Services on the BoCC webpage:
<https://alachuacounty.us/depts/css/childrenstrust/pages/default.aspx>

4. No-cost extensions for RFP 20-937 – due today, August 3, 2020.
5. Pritzker Children’s Initiative – CTAC will be awarded funding; the Pritzker Foundation is sending an agreement our way. Agreement will be presented to the Trust (hopefully by August 31). Appropriation of funds will occur during the budget process in September.
6. Notice to Explore or Decision to Claim Title IV-E – The DCF consultant determined that CTAC is funding activities (through the Social and Emotional Development Program) that are reimbursable through Medicaid in the amount of \$8,000 per year (approximate). At the April 27, 2020 meeting, the CTAC authorized the Executive Director to pursue an agreement with DCF to claim these funds. While the amount is small, it is likely that future programs funded by CTAC will also qualify for either Medicaid or Title IV (child welfare) reimbursements. Pursuing this agreement now will give CTAC “practice” in building the infrastructure to draw down these funds.
7. August 17, 2020 Workshop – information, separate from the Board packet, will go out this week for your review prior to the workshop. More detailed instructions will follow next week.

1 Trust Members Have What They Need In Order To Govern In An Effective, Efficient, Transparent, And Fiscally Responsible Manner

1.1 The Trust meets 100% of the requirement for meeting notices, publishing agendas, minutes, and other statutorily required information

1.1.1 Develop a separate website for CTAC (in progress)

~~*1.1.2 Invest in an online meetings management platform*~~

~~*1.1.3 Invest in an online Policies and Procedures platform*~~

~~*1.1.4 Assign duties of “Clerk of the Trust” to the position of Executive Assistant*~~

1.1.5 Develop Trust policies around meeting notices, public comments, and other measures to ensure adequate opportunities for public input

1.2 100% of Trust Members understand their roles and responsibility as a Trust member

~~*1.2.1 Develop a Trust Member Orientation process*~~

~~*1.2.1.1 Create a Trust Member Notebook*~~

~~*1.2.1.2 Conduct Individual Trust Member Orientations*~~

1.2.1.3 Executive Director and Trust Members meet one-on-one on a quarterly basis (continuous)

1.2.2 Review the Bylaws at least once per year (schedule for December)

1.2.3 Develop policies around board governance to include: Delegation of Authority to the Executive Director; Conflict of Interest situations and resolutions;

1.3 100% of Trust Members say they understand the financial condition of the Trust

1.3.1 Work with the Finance and Administration Manager to develop quarterly report

~~*1.3.1.1 Develop quarterly reports reflecting the accounts of the organization*~~

~~*1.3.1.2 Develop reports that reflect the spending pattern of Trust-funded programs*~~

~~1.3.2 Understand and Evaluate the relationship between the Trust and the Clerk of the Courts~~

1.3.3 Review and Revise fiscal, budgetary, and investment policies

1.3.3.1 Review and revise the Trust's fund balance policy

~~1.3.4 Contract with an independent external auditor~~

1.4 100% of Trust Members understand the rationale behind the programmatic funding decision of the Trust

1.4.1 Develop a program funding plan using the Results-Based Accountability Framework in order to address both Population Level and Program Level Accountability

~~1.4.1.1 Technical Advisory Committee makes recommendations around Community Level results and community indicators that the Trust should monitor over time~~

1.4.1.2 Conduct additional assessment to determine the "Story behind the Story" of the community indicators (TBD)

1.4.1.3 Convene groups of community members, service providers, and subject matter experts to determine "What works" (TBD)

1.4.2 Develop a programmatic procurement process to award funding to organizations based on their ability to contribute to improving community indicators

1.4.2.1 Adopt funding categories that may include: *targeted (competitive) funding, renewal funding, match funding, innovation funding (small grants), and unsolicited funding* (August 31, 2020)

1.4.2.2 Adopt policies that delineate minimum standards that organizations must meet in order to receive funding (August 31, 2020)

1.4.2.3 *Adopt general procurement policies* (August 31, 2020)

1.4.3 Develop a periodic program reporting structure to report on the performance measures of individual Trust-funded programs (First draft, August 31, 2020)

2 *Trust has the Capacity and Infrastructure to Carry out the Policy Agenda of the Trust*

2.1 *The Trust has 100% of the necessary staff to operate as a best-in-class Children's Services Council*

~~2.1.1 Executive Director recommends functions that are performed in-house or contracted out through interlocal agreements or private~~

2.1.1.1 Executive Director includes an organizational chart and cost and descriptions of interlocal agreements in the annual budget. (See chart in Board packet)

~~2.1.2 Executive Director recommends staff positions that support both the General Government Operations of the Trust as well as provide direct support to program activities.~~

2.1.3 Job Descriptions developed that accurately reflect the job duties (will be completed upon approval)

2.1.4 HR Policies developed that protect the rights of staff and support a high-performance workforce

~~2.1.4.1 Contract with the Krizner Group to develop an employee handbook and HR Policies to be approved by the Trust~~

2.1.4.2 Trust and Executive Director develop a policy to evaluate the performance of the Executive Director

2.1.5 Salaries and benefits packages are competitive and allow for the recruitment of high performers

2.1.5.1 Trust participates in the BoCC self-insurance program (in progress) - TO BE NEGOTIATED IN THE ITERLOCAL AGREEMENT

~~2.1.5.2 Trust participates in the Florida Retirement System~~

2.1.5.3 Procure a payroll vendor

2.1.5.4 Procure a supplemental retirement vendor NEW

2.1.5.5 Procure a supplemental life insurance vendor NEW

2.1.5.6 Procure a flexible spending benefits vendor NEW

~~2.1.5.7 Develop an employee classification system and pay plan~~

2.2 The Trust staff has 100% of the infrastructure to support their job functions.

2.2.1 Invest in hardware and software that enable more efficient operations

~~2.2.1.1 Laptops for all staff (in progress)~~

~~2.2.1.2 Cloud-based enterprise software~~ **DISCONTINUED**

~~2.2.1.3 1GB internet through GRUComm and participation in the BoCC network~~

~~2.2.1.4 Work spaces and policies that support social distancing and telecommuting~~

2.2.1.5 Evaluate the New World System (IN PROGRESS)

2.2.1.6 Evaluate and Procure a Management Information Systems that can support the entire grant-making cycle both programmatically and fiscally

2.2.2 Make provisions for training and travel to support improved job performance *(in progress – see budget)*

2.3 The Trust has a location that meets 100% of its short-term and long-term needs

~~2.3.1 Lease space that meets the needs of a staff of up to 11 employees for the next 2-3 years~~

2.3.2 Secure meeting space for full trust meetings for FY21

2.3.3 **Determine whether to lease, buy, or build past Year 3 (FY24).**

File Attachments for Item:

9. 3rd Quarter Budget Review

**Item:**

3rd Quarter Budget Review

Requested Action:

The Trust is asked to receive the 3rd 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

Finance and Administration Manager Report
Income Statement
CTAC Provider Handbook

Programmatic Impact:

NA

Fiscal Impact:

NA

Recommendation:

Receive the Report



CHILDREN'S TRUST OF ALACHUA COUNTY

Finance & Administrative Report – August 3, 2020

Presented by Jennifer Rivers, Finance & Administration Manager

Item 9.

1. Statutory Financial Reports

In accordance with Florida Statutes, Section 125.901, which requires an independent special district to prepare and file with the governing body of the County a quarterly financial report within 10 days after expiration of each quarter. The information depicted below is included in the Third Quarter Financial Reports presented on the Consent Agenda.

The total expenditures for the quarter

- MTD Expenses \$ 150,916
- YTD Expenses \$ 970,157

Total Revenue during the quarter

- MTD Revenues \$ 216,958
- YTD Revenues \$7,340,113

Statement of funds on hand invested or deposited at the end of the quarter/Statement of Cash Position for the quarter

- Unexpended Balance \$6,369,956
- Outstanding Encumbrances \$1,390,059
- Ending Balance \$4,979,898

Total Administrative costs for the quarter

- Professional Services \$134,578
- Property Appraiser/Tax Collector \$145,664
- Other Contractual Services \$ 35,250
- Other current Charges & Obligations \$ 309
- Total \$315,801

2. Aid to Private Organizations

- Budget Amount \$5,258,025
- Current Month Transactions \$ 128,923
- YTD Encumbrances \$1,368,360
- YTD Transactions \$ 623,216

3. June Monthly Transaction Report

- Monthly Bank Activity Total \$ 156,301

4. Internal Controls

- A Provider Handbook was created to provide guidance on program policy and procedures to agencies when requesting payments for contracts.
- A Provider Orientation was conducted on June 21, 2020, utilizing video production. Orientation video uploaded to CTAC Youtube Channel.

- Barriers & Areas of Impact includes vendor management, purchase orders, and encumbrances. RFA-937 awards were entered in ERP system by setting up agency with a GL number (account). However, vendors, purchase order and encumbrances were not set up for all awards.
- Currently, auditing all contracts to ensure congruency. The goal is to establish strong internal controls while ensuring monthly invoice payments adhere to prompt payment policy.
- Hiring Fiscal Assistant will help expedite aforementioned.



Income Statement

FY20 YTD 3rd Quarter Ending June 30, 2020

Item 9.

	FY 2020 Annual Budget	MTD Actual	FY 2020 YTD Actual	FY 2020 YTD Encumbrances	Budget to Actual Variance	% of Budget
Governmental Funds						
REVENUE						
Ad Valorem Taxes Current Real & Personal Property	7,238,758.00	217,361.26	7,329,564.97	.00	(90,806.97)	101
Ad Valorem Taxes Delinquent Taxes	.00	(4,347.23)	(7,058.74)	.00	7,058.74	ss
Interest And Other Earnings Int Earn - Tax Collector	.00	.00	1,235.07	.00	(1,235.07)	+++
Interest And Other Earnings General Government Interest	.00	3,944.17	16,372.16	.00	(16,372.16)	+++
Non-Operating Sources Ending Fund Balance	(361,938.00)	.00	.00	.00	(361,938.00)	0
Revenue Totals	\$6,876,820	\$216,958	\$7,340,113	\$0	(\$463,293)	107%
Financial and Administrative						
EXPENSE						
Professional Services Professional Services	500,000.00	466.66	134,577.97	.00	365,422.03	27
Professional Services Property Appr / Tax Collector	144,775.00	5,881.52	145,664.08	(5,881.52)	4,992.44	97
Other Services Other Contractual Services	163,250.00	.00	35,250.00	.00	128,000.00	22
Other Current Charges and Obligations Other Current Chgs & Obligations	.00	159.23	308.55	.00	(308.55)	+++
Financial & Administrative Totals	\$808,025	\$6,507	\$315,801	(\$5,882)	\$498,106	38%
Other Human Services						
Professional Services Professional Services	277,784.00	.00	3,400.00	6,593.27	267,790.73	4
Travel and Per Diem Travel & Per Diem	5,000.00	.00	500.79	.00	4,499.21	10
Communications Services Communication Services	1,848.00	.00	.00	.00	1,848.00	0
Utility Services Utility Services	.00	.00	220.00	.00	(220.00)	+++
Rental and Leases Rental and Leases	22,360.00	7,125.00	7,125.00	4,750.00	10,485.00	53
Insurance Insurance	1,000.00	.00	.00	.00	1,000.00	0
Repairs and Maintenance Services Repairs and Maintenance	1,000.00	.00	.00	.00	1,000.00	0
Promotional Activities Promotional Activities	10,000.00	.00	402.81	.00	9,597.19	4
Other Current Charges and Obligations Other Current Chgs & Obligations	15,309.00	.00	.00	.00	15,309.00	0
Office Supplies Office Supplies	19,595.00	.00	428.19	4,571.81	14,595.00	26
Operating Supplies Operating Supplies	64,936.00	8,360.10	9,754.74	11,234.90	43,946.36	32
Books Publications Subscriptions and Memberships Memberships	.00	.00	9,309.00	.00	(9,309.00)	+++
Capital Outlay Capital Equipment	30,000.00	.00	.00	.00	30,000.00	0
Aid to Private Organizations Aid to Private Organizations	2,224,908.00	.00	.00	.00	2,224,908.00	0

	FY 2020	MTD	FY 2020	FY 2020	Budget to Actual	Item 9.
	Annual Budget	Actual	YTD Actual	YTD Encumbrances	Variance	Budget
Aid to Private Organizations Healthy Start of North Centrl FL	400,000.00	.00	142,330.61	257,669.39	.00	100
Aid to Private Organizations The Child Center	439,228.00	18,721.85	163,882.89	275,345.11	.00	100
Aid to Private Organizations Meridian Behaviorial Healthcare	354,636.00	23,289.83	176,466.20	178,169.80	.00	100
Aid to Private Organizations Alachua County Sheriff's Office	113,995.00	44,270.00	44,270.00	69,725.00	.00	100
Aid to Private Organizations BOOST Project Alliance	36,060.00	.00	.00	.00	36,060.00	0
Aid to Private Organizations Cade Museum Foundation	104,960.00	.00	37,475.00	30,010.00	37,475.00	64
Aid to Private Organizations CDS Family-Behavioral Health Svc	65,325.00	.00	.00	65,325.00	.00	100
Aid to Private Organizations Children Beyond our Borders	14,909.00	133.25	133.25	14,775.75	.00	100
Aid to Private Organizations City of Alachua	135,002.00	.00	.00	.00	135,002.00	0
Aid to Private Organizations City of Gainesville - GPD	49,453.00	.00	.00	.00	49,453.00	0
Aid to Private Organizations Cultural Arts Coalition	22,044.00	.00	.00	.00	22,044.00	0
Aid to Private Organizations City of Gville - PRCA SkyBridge	14,802.00	.00	.00	14,802.00	.00	100
Aid to Private Organizations Girls Place, Inc - ACHIEVE	22,403.00	.00	.00	41,995.00	(19,592.00)	187
Aid to Private Organizations FL Institute for Workforce Innov	96,874.00	.00	.00	.00	96,874.00	0
Aid to Private Organizations Gainesville Police Department	8,450.00	.00	.00	.00	8,450.00	0
Aid to Private Organizations Peacefull Paths, Inc	27,500.00	.00	.00	.00	27,500.00	0
Aid to Private Organizations Girls on the Run-Alachua County	7,007.00	2,090.66	2,090.66	4,916.34	.00	100
Aid to Private Organizations Manhood Youth Development	22,500.00	.00	.00	.00	22,500.00	0
Aid to Private Organizations Mt. Carmel Baptist Church	14,655.00	.00	.00	.00	14,655.00	0
Aid to Private Organizations National Alliance Mental Illness	38,577.00	3,978.00	6,161.00	32,416.00	.00	100
Aid to Private Organizations Junior Achievement	10,000.00	.00	.00	.00	10,000.00	0
Aid to Private Organizations New Technology Made Simple Now	91,173.00	.00	.00	.00	91,173.00	0
Aid to Private Organizations PALS THRIVE (UF Health Program)	80,275.00	.00	.00	.00	80,275.00	0
Aid to Private Organizations Renaissance JAX (Swampbots FTC)	31,380.00	.00	.00	.00	31,380.00	0
Aid to Private Organizations River Phoenix Peacebuilding Ctr	19,500.00	.00	.00	19,500.00	.00	100
Aid to Private Organizations Star Center Childrens Theatre	60,284.00	4,870.25	4,870.25	55,413.75	.00	100
Aid to Private Organizations Together Gainesville	25,500.00	.00	.00	.00	25,500.00	0
Aid to Private Organizations United Church-Rawlings Food4Kids	8,900.00	.00	.00	.00	8,900.00	0
Aid to Private Organizations Boys & Girls Club Alachua County	36,000.00	.00	.00	.00	36,000.00	0
Aid to Private Organizations Early Learning Coalition	47,400.00	.00	.00	47,400.00	.00	100
Aid to Private Organizations United Way of Central Florida	5,812.00	.00	.00	5,812.00	.00	100
Aid to Private Organizations University of Florida	20,824.00	.00	.00	.00	20,824.00	0
Aid to Private Organizations UF Board/Trustees-FL Mus Nat His	40,163.00	.00	.00	.00	40,163.00	0
Aid to Private Organizations UF College of Dentistry	73,437.00	.00	.00	.00	73,437.00	0
Aid to Private Organizations UF College of Nursing FPA	15,569.00	.00	.00	.00	15,569.00	0

	FY 2020 Annual Budget	MTD Actual	FY 2020 YTD Actual	FY 2020 YTD Encumbrances	Budget to Actual Variance	Budget
Aid to Private Organizations Vineyard Christian Fellowship	77,690.00	27,034.76	32,870.16	44,819.84	.00	100
Aid to Private Organizations City of Gville - PRCA SummerCamp	19,302.00	.00	.00	19,302.00	.00	100
Aid to Private Organizations Girls Place Inc - Transportation	19,592.00	.00	.00	.00	19,592.00	0
Aid to Private Organizations Florida Organic Growers	11,704.00	.00	.00	11,704.00	.00	100
Aid to Private Organizations United Church Gville-Read to Win	43,823.00	.00	.00	43,823.00	.00	100
Aid to Private Organizations Gville Tennis Assoc-FitLite Proj	28,266.00	.00	.00	28,266.00	.00	100
Aid to Private Organizations Gville Tennis Assoc-After School	24,250.00	.00	.00	24,250.00	.00	100
Aid to Private Organizations Equal Access Clinic Network	7,475.00	.00	.00	.00	7,475.00	0
Aid to Private Organizations Planned Parenthood SENFL	25,000.00	.00	.00	.00	25,000.00	0
Aid to Private Organizations PACE Center for Girls, Inc	111,832.00	.00	.00	.00	111,832.00	0
Aid to Private Organizations Kids Count in Alachua County Inc	66,032.00	.00	.00	66,032.00	.00	100
Aid to Private Organizations Black on Black Crime Task Force	14,000.00	.00	.00	.00	14,000.00	0
Aid to Private Organizations Big Brothers Big Sisters	29,554.00	4,534.50	12,666.00	16,888.00	.00	100
Other Human Services Totals	\$5,706,857	\$144,408	\$654,357	\$1,395,510	\$3,656,990	36%
Other Non Operating Other Uses Appropriated Reserves	361,938.00	.00	.00	.00	361,938.00	0
REVENUE TOTALS	6,876,820.00	216,958.20	7,340,113.46	.00	(463,293.46)	107%
EXPENSE TOTALS	6,876,820.00	150,915.61	970,157.15	1,389,628.44	4,517,034.41	34%
Grand Total Net Gain (Loss)	\$0	\$66,043	\$6,369,956	(\$1,389,628)	\$4,980,328	+++



Provider Handbook

Children's Trust of Alachua County
802 Northwest 5th Avenue, Suite 100
Gainesville, FL 32601
(352) 374-1822

Effective Date
June 2020

Table of Contents

Provider Handbook	1
Introduction.....	3
Reimbursement	3
CTAC Will Only Pay Allowable Costs	3
CTAC Pays Promptly	3
Your Information is Public.....	3
Reimbursable Expenses	3
Direct Costs	3
Overhead Costs.....	3
Equipment.....	4
Goods and Services	4
Payroll	4
Travel and Transportation	4
Supporting Backup Documentation Checklist.....	5
Monthly Invoice Form	6
Documentation.....	7
Section A – Documentation Checklist for Salaries	7
Section B – Documentation Checklist for Fringe Benefits	7
Section C – Documentation Checklist for Operating Costs.....	8
Section D – Documentation Checklist for Other and One-time Expenditures	9
Examples of “other” items may include the following:	9
Unallowable	10
Section E – Budget Amendment Request	10
Section F – September 30 th Fiscal Year-End Report Requirements	10
September 30 th Fiscal Year-End Reimbursement Requirements.....	11
Section G – Changes to Contract	11
Section H – Reporting Significant Developments	12
Section I – Subcontracting	12
Section J – Supplemental Activity Report	12
Frequently Asked Questions	13

Introduction

This handbook provides general guidance on program policy and procedures on requesting payments for contracts. It is important to note rules may vary depending on the contract terms, general terms & conditions, or program guidance. To determine what you can bill, refer to the contract, this guide, and programmatic guides applicable to your project.

Reimbursement

You have to pay first. CTAC pays all your contracts through reimbursement. You may request reimbursement only after you have paid your employees and vendors.

CTAC Will Only Pay Allowable Costs

CTAC will pay only for allowable costs. A cost is allowable if it is reasonable, necessary to complete the approved scope of work, allowable in the contract, documented adequately, and incurred during the period of performance set forth in the contract. Costs outside the period of performance are not allowable. A cost is considered reasonable if the work or materials and the cost reflect what a prudent person would have spend under the circumstances. Some costs may be eligible if prior approval is given by the contract, Executive Director or Program Manager.

CTAC Pays Promptly

CTAC is provided 45 days to pay a properly completed reimbursement invoice, in accordance with the Local Government Prompt Payment Act, Chapter 218, Part VII Florida Statutes. In most cases, reimbursement requests are paid within 30 days of receiving a properly completed invoice. Properly completed invoiced include all necessary documentation, signatures, and backup documents.

Your Information is Public

All information and documentation submitted to CTAC is open to public review (Florida Statutes, Chapter 119). CTAC recommends social security numbers be removed from documents submitted to CTAC.

Reimbursable Expenses

Direct Costs

CTAC will reimburse for direct and overhead costs that are allowable under the contract. Direct costs are those that can be assigned to a particular project activity and budget object contained in the contract such as:

- Compensation of actual hours of employees for the time devoted to the project.
- Cost of materials and equipment used specifically for the project.
- Actual hours of administrative personnel who process vouchers, payroll, and other accounting activities specific to the project.

Overhead Costs

Overhead represents those costs that benefits more than one activity and that cannot be directly assigned to a task of the project. Overhead costs are not allowed unless explicitly specified in the contract.

Equipment

Purchases of equipment is a conditionally allowable expense and must be included in the Scope of Work and MUST HAVE prior written authorization from CTAC Executive Director or Program Manager for all equipment purchases.

Goods and Services

For all goods and services purchased for the project, the Provider must retain the original invoice or receipt in their contract file. Goods and Services must also be an allowed expense under the contract.

Payroll

Employee time directly to the approved scope of work may be reimbursed. The reportable amount is the employee's regular rate of pay, including taxes and benefits. Taxes and benefits are allowable only if you pay them when they are due.

Travel and Transportation

If travel costs are allowable for your contract, they are limited to the state per diem rates (see supporting backup documentation checklist below). You must maintain a detailed travel log, which includes a name with dates, times, locations, business purpose, and itemized travel costs.

Supporting Backup Documentation Checklist

Reimbursement is to be requested for approved budgeted line items only. Expenditures requested for non-budgeted line items will be disallowed.

This document is intended as a guide as to what is considered appropriate documentation to support expenditures. The supported documentation is to be submitted in accordance with the following checklist:

- _____ Copies are clean and readable. **ALL** receipts should **clearly** indicate the vendor name and the imprinted date of the purchase.
- _____ Copies are to be organized in the same order as the expenditures listed in the request for reimbursement.
- _____ If more than one item and/or amount is on a page and not all items are to be reimbursed by the CTAC, highlight the item and/or place an asterisk “*” next to the item requested to be reimbursed.
- _____ Pages are to be numbered (may be done by hand). The “Monthly Invoice Form” must be used for ease in review and the page number of the supporting documentation indicated.
- _____ Small paper receipts (i.e. cash register tapes) **should be taped** to an 8 ½ x 11” sheet of paper and copied to minimize the possibility of receipts being lost in the transit process. If you are submitting small receipts, limit two or three per page. Long tapes (Target or Walgreens, etc.) should be folded in such a way that the date, vendor, and total of the receipt are visible.
- _____ Checks are to relate to the month that reimbursement is requested
- _____ Requests for reimbursement are to exclude the Florida sales tax in instances that sales tax should not have been paid.
- _____ Copy of the bank statement from which checks were paid e.g. operating and payroll account and/or Copy of cancelled check/Proof of Payments.
- _____ Only information related to the staff being charged to the CTAC Agreement should be included in the supporting documentation. Information related to other staff members should be redacted. Sensitive information such as social security numbers, etc., should also be redacted.

****** IMPORTANT ******

Invoice Due Dates – Invoices are due to the CTAC no later than the 15th of the month following the month of service, unless otherwise agreed in writing by the CTAC.

Monthly Invoice Form

When requesting reimbursement, a photocopy of the original receipt should be submitted to the CTAC. The following requirements must be met:

1. The agency must attest in writing that the receipt copy is a "Certified Copy" of the original. This attestation must be on **all** copies of receipts, invoices, checks, bank statements and/or credit card statements. (i.e. Authorized signature and date written on all receipts). ALL receipts should **clearly** indicate the vendor name and the imprinted date of the purchase.
2. A stamp or label may be used to indicate the copy is a certified copy of the original.
3. Each certified document must be signed or initialed and dated by an appropriate officer of the agency.
4. **Cost reimbursement receipts (copies and supporting documentation) must be presented to CTAC for payment within 30 days of the transaction date.** For instance, if the reimbursement request is for services during the month of March, and the payment receipt (e.g., check) is dated in January, payment will be rejected. This is to avoid the possibility of an original and a duplicate both being presented to CTAC for payment.
5. Original documents must remain available at the contracted agency for audit by CTAC personnel.
6. Lost or missing documents could negatively impact administrative reviews.
7. Payments made by credit card must be supported by the receipt of the transaction and the credit statements or transaction report.
8. If the purchase was made with a form of payment other than the company's credit card. (e.g., cash, check, credit card, etc.,) proof of verification of payment/reimbursement to the third party should be submitted along with the payment receipts.
9. The invoice Certification section must be signed by the Agency's authorized signatory.

Documentation

Section A – Documentation Checklist for Salaries

- _____ Copy of payroll register. Place an asterisk “*” and/or highlight the employee(s) charged to the program. The payroll register is to include the employee name, pay period, position title (position title must be in agreement with the title appearing in the approved contract budget), gross check amount, hourly rate and/or annual salary, number of hours worked for the contract and check number. If the payroll register does not reflect the check number, attach a copy of the cancelled payroll check.
- _____ CTAC “Summary of Payroll Expenses” Form, i.e. the percentage of time that the employee devoted to the program, if applicable.
- _____ Copy of timesheet
- _____ Copy of cancelled check/Proof of Payment

Employee time directly related to the approved scope of work may be reimbursed. The reportable amount is the employee’s rate of pay, including taxes and benefits. Taxes and benefits are allowable only if you pay them when they are due.

Section B – Documentation Checklist for Fringe Benefits

Payroll Taxes, etc.

- _____ Copy of applicable payroll tax report(s)
- _____ Proof of tax payment (e.g. wire transfer)

Insurances (Health, Life, Disability, etc.):

- _____ Copy of the insurance invoice (highlight the employees charged to the program, if applicable).
- _____ Copy of cancelled check/Proof of Payment/Proof of Payment

Payments to Retirement Benefits:

- _____ Copy of the invoice detailing payment per the employee register (highlighting the employees charged to the program)
- _____ Copy of cancelled check/Proof of Payment or proof of the payment/transfer

Payroll related costs charged to CTAC contracts must be documented on a timesheet and included with the reimbursement request, along with this information:

- Reflect an after-the-fact determination of the actual activity of each employee.
- Account for the total activity for which employee and by a responsible supervisor having firsthand knowledge of the activities performed by the employee.
- Be prepared at least monthly and coincide with one or more pay periods.
- Not be budget estimates or other distributions based on a percentage before the work was performed.

If a timesheet is unable to be used for reimbursement because of an entity’s accounting system, individual employees may fill out a Contracting Individual Contributed Services Form.

Section C – Documentation Checklist for Operating Costs

Travel:

If travel costs are allowable for your contract, they are limited to the state per diem rates, which can be found by following this link: <https://www.federalpay.org/perdiem/2020/florida>. You must maintain a detailed travel log, which includes names with dates, times, locations, business purpose, and itemized travel costs. When bill for travel, the travel must be on a Travel Expense Voucher form.

The portion of allowable transportation costs that are directly attributed to the contract can be reimbursed using one of the following methods:

- Mileage: Allowable costs are limited to the current state mileage rate. No other vehicle costs including insurance, fuel, oil changes, repairs, maintenance, or lease payments will be allowed.
- Vehicle Rental: is limited to actual rental and fuel costs.
- All receipts for all lodging and travel-related expenses must be submitted on a travel voucher request form.
- Local Travel
 - _____ Copy of travel expense report, i.e., local travel log detailing for each trip, the place visited, reason for the visit, date of the visit, miles traveled (odometer readings or printout from web-based mapping site), parking and toll costs, mileage reimbursement rate, mileage cost.
 - _____ Copy of receipts for parking tolls (may be Sunpass report). Place and asterisk “*” next to the item requested to be reimbursed and/or highlight the item).
 - _____ Copy of cancelled check/Proof of Payment/proof of payment
- Out-of-town Travel
 - _____ Copy of travel expense report and related receipts, including meals, parking and tolls (rates for meals must be in accordance with The Children’s Trust budget guidelines)
 - _____ Invoice for transportation costs (air, bus, train, or car).

For Travel by Car:

- _____ Employee Car: Travel log as detailed above
- _____ Rental Car: Invoice from car rental agency and gasoline receipts

For Travel by Air, Bus, or Train:

- _____ Invoice detailing ticket price and point of origin and destination
- _____ Rental Car: Invoice from car rental agency and gasoline receipts
- _____ Receipts for any allowance incidentals (i.e., taxi fare)
- _____ Copy of cancelled check/Proof of Payment/proof of payment

Travel (Participants):

- _____ Invoice from transportation company. Invoice must list, at a minimum, date of travel and destination.
- _____ Copy of cancelled check/Proof of Payment/Proof of Payment

Meals (Participants)

- _____ Copy of invoices from food vendor
- _____ Copy of cancelled check/Proof of Payment

Space

- _____ Copy of lease agreement
- _____ Copy of cancelled check/Proof of Payment

Utilities

- _____ Copy of vendor invoice/bill
- _____ Copy of cancelled check/Proof of Payment

Supplies - Office

- _____ Copy of vendor invoice/bill
- _____ Copy of cancelled check/Proof of Payment

Supplies - Program

- _____ Copy of vendor invoice/bill
- _____ Copy of cancelled check/Proof of Payment

Non-Capital Equipment

- _____ Copy of vendor invoice/bill (serial number, quantity, etc., must agree with information entered on The Children's Trust invoice)
- _____ Copy of cancelled check/Proof of Payment

Capital Equipment

- _____ Copy of vendor invoice/bill (serial number, quantity, etc., must agree with information entered on The Children's Trust invoice)
- _____ Copy of cancelled check/Proof of Payment

Professional Services

- _____ Copy of agreement. If agreement terms are based upon a cost reimbursement method of payment, supporting documentation of each cost must be provided.
- _____ Copy of vendor invoice/bill
- _____ Copy of cancelled check/Proof of Payment

Section D – Documentation Checklist for Other and One-time Expenditures

(Items are to be in agreement with the approved budget)

- _____ Invoice and other relevant supporting documentation
- _____ Copy of cancelled check/Proof of Payment

Examples of “other” items may include the following:

- Fieldtrip
 - _____ Copy of vendor invoice/bill. It should, at a minimum, detail vendor name, date of visit, number of tickets/admissions, cost per ticket/admission, and total cost.
 - _____ Attendance roster
 - _____ Transportation documentation
 - _____ Copy of receipt (Proof of payment)

Backup documentation such as invoices and other directly related information must be included in order to be reimbursed. Attendance rosters representing those who went on the field trip, transportation documentation, etc. shall be maintained with the Provider and available to CTAC upon request. Social Security Numbers should be redacted.

- Background Screenings
 - _____ Receipt for fingerprinting cost (if applicable)
 - _____ Copy of submission document and/or invoice
 - _____ Copy of receipt (Proof of payment)
- Conference and Training
 - _____ Copy of registration. It should, at a minimum, detail the name of the conference/training, short description of same, name of registrant, and cost.
 - _____ Copy of submission document and/or invoice
 - _____ Proof of Payment
- Employee and Volunteer Testing
 - _____ Copy of invoice for testing agency & Copy of cancelled check/Proof of Payment/proof of payment
 - _____ Copy of receipt

_____ Credit Card Payments

If payment was made using a credit card, submit the Agency credit card receipt as evidence that the item has been paid. Credit card purchases made by employees or entities other than the Provider, reimbursement will be made by The Children's Trust after evidence is submitted that the Provider has paid the entity making the original credit card purchase.

_____ Online Payments

If payment is made online, supporting documentation includes the printed receipt showing payment and acceptance of the payment by the vendor.

Unallowable

Cash and money orders are considered unallowable supporting documentation since they cannot be specifically identified or assigned to a bank statement or payee.

Section E – Budget Amendment Request

Request Budget Amendment (10%, excluding scope of services)

- _____ Approval of CTAC Executive Director required
- _____ Above 10% and/or change in scope of services as stated in Agreement, must be requested in writing. A Budget Amendment Request Form, must be submitted by Agency to CTAC Financial & Administrative Manager.

Section F – September 30th Fiscal Year-End Report Requirements

- _____ Budget to Actual Report is due to the Financial & Administrative Manager by November 15th of each year. The budget to actual report documents the actual program expenditures against the original approved program budget. CTAC allows a 10% variance on the budget, subject to approval of Executive Director. Variances in excess of 10% should be explained.

September 30th Fiscal Year-End Reimbursement Requirements

Fiscal Year Deadline dates will be published in mid-September; however, the following information remains consistent from year-to-year:

1. CTAC **may** grant a provider permission to carry-forward exact amounts of a purchase if the provider has received word from their vendor that the goods will be delayed.
2. To request a carry-forward, submit a memo to the Financial & Administrative Manager on Agency letterhead, signed by an approved agency signer. Include in the memo the reason for the request. Attach a copy of the back-order information received from the vendor. The Financial & Administrative Manager and the Programs Manager will review the request, and if warranted, seek approval. **The carry-forward requests must be received on or before September 30th of the current fiscal year.**
3. Goods ordered and received prior to or on September 30th **MUST** be included on the September invoice. Note that the September invoice is due to CTAC on or before October 15th.

Indicate on the Reimbursement Detail Report beside the vendor name “(backorder received)”. CTAC will reduce the approved carry-forward amount accordingly.

4. Invoices (original copies) pertaining to a prior fiscal year **will not** be honored if the invoices are submitted after the published fiscal year-end deadline.

Section G – Changes to Contract

The work agreed to under a contract may change during the life of the contract. An Amendment is a written document detailing the additions and supplements to the original terms of the contract. An amendment is how CTAC formalizes these changes, and it becomes a part of the contract. Any subsequent amendments to the contract are numbered sequentially over the life of the contract.

An amendment is necessary whenever there is:

- A revision in the objectives of the project.
- A decrease or increase in the contract amount.
- Whenever the expiration date is extended.

An amendment is **NOT** required for administrative adjustments such as changes in address or phone number or an authorized signatory. Changes like these must still be reported to CTAC in writing.

Amendments are to be signed by CTAC and the Provider and a copy is sent to the Provider for their files.

Section H – Reporting Significant Developments

Events with significant impact on the contract project may occur anytime. CTAC must be informed as soon as any of the following situations come to light:

- Any problems, delays or adverse conditions which will materially affect the ability to meet project objectives, intermediate outcomes, time schedules, or project tasks within the time periods. This disclosure will be accompanied by a statement of the action taken or proposed, and any assistance needed from CTAC to resolve the situation.
- Favorable developments that enable meeting schedules or objectives sooner or at a less cost than anticipated, or that produce more beneficial results than originally planned.

Section I – Subcontracting

- When subcontracting using CTAC funds, a copy of the subcontract signed by both parties is required.

Section J – Supplemental Activity Report

CTAC reserves the right to request activity reports and supplemental activity reports at any time. These may be based upon legislative, budget, other reporting requests to CTAC. If an activity report is not received by the due date, CTAC will withhold payment of any subsequent invoice reimbursement requests until the information is received.

Frequently Asked Questions

Q: When are Provider invoices due to CTAC?

A: Invoices are due to the CTAC no later than the 15th of the month following the month of service, unless otherwise agreed in writing by the CTAC.

Submission of Agency's Final Payment

The Final invoice date is extended to November 15th each year. The CTAC has no obligation to provide reimbursement to the Agency for invoices which include expenses incurred in any previous grant period, if submitted after November 15th.

Q: When can I expect Payment?

A: CTAC will generate a payment vouchers for each properly submitted reimbursement request as received and approved. Payments will be made in accordance with the Local Government Prompt Payment Act, Chapter 218, Part VII Florida Statutes. (If backup is insufficient or inaccurate and/or agency in noncompliance with contract deliverables or program requirements, CTAC may withhold payment until resolved).

Q: Where do I submit invoice & backup documentation?

A: CTAC's invoice email: invoice@childrentrustofalachuacounty.us

Q: Do I submit a Monthly Expense Report?

A: The invoice serves as the Provider Monthly Expense Report. The report should be completed, using the Excel Monthly Invoice Form included in the Provider Packet.

Q: Who is the CTAC contact person for invoice and/or documentation questions?

A: Jennifer Rivers, Financial & Administrative Manager
jrivers@childrentrustofalachuacounty.us or (352) 374-1822

Q: Why do I need to submit backup documentation?

A: Copies of receipts are a requirement for payment. Detailed records of service must remain available at the contracted agency for audit either by CTAC staff or CTAC contract auditors/monitors.

Q: Should I maintain financial records and reports relating to the utilization of funds?

A: Yes. Maintain books, records, documents, invoices, and other evidence and accounting procedures and practices such as will permit the Agency to sufficiently and properly reflect all direct costs of any nature associated with the program.

Q: Does CTAC monitor agency activities?

A: By accepting public funds, the Provider agrees to permit authorized CTAC persons to inspect all records, papers, documents, facilities, goods, and services of the Agency and interview any employees and clients of the Agency to be assured of satisfactory performance of the terms and conditions of the Agreement.

Q: What is the process for submitting budget amendment requests?

A: Complete a Budget Amendment Request Form and submit to:
Jennifer Rivers, Financial & Administrative Manager
jrivers@childrentrustofalachuacounty.us

Q: Who receives and manages Public Records Requests for CTAC?

A: If the agency has questions regarding Chapter 110, Florida Statutes, contact the CTAC at email: publicrecordsrequest@alachuacounty.us. Phone: (352) 384-3132.

Providers who fail to provide the public records, at the request of the CTAC, within a reasonable time may be subject to penalties under s.119.10.

Q: How do I request a contract extension?

A: Executed Agreements as a result of RFA No. 20-937, contract extensions must be received by the CTAC no later than 5:00 p.m. August 3, 2020. Any extension shall only be valid through a written amendment executed by both Parties.

Q: Can the Agreement with CTAC be modified?

A: The agreement may be modified by mutual agreement of both parties and is effective by a written amendment to current Agreement, fully executed by both parties.

Q: Can the Agreement with CTAC be terminated?

A: Yes. A notice of termination from either party to the other party must be in writing and sent by certified mail, return receipt requested or by personal delivery with receipt.

CTAC Representative: Chair, Children's Trust of Alachua County
c/o Children's Trust Record Custodian
PO Box 5669
Gainesville, FL 32627

A copy of any notice must be sent to:

J.K. "Jess" Irby, Esq.
Clerk of the Circuit Court
12 SE 1st Street
Gainesville, FL 32602
Attn: Finance and Accounting

And to: Procurement Division
12 SE 1st Street
Gainesville, FL 32601
Attn: Contract

Please refer to your agency contract agreement with CTAC, which contains all the terms and conditions agreed up by both parties.

File Attachments for Item:

10. Adoption of Resolution 2020-8 Employee Handbook

**Item:**

Adoption of Resolution 2020-8 Employee Handbook

Requested Action:

The Trust is asked to approve the Employee Handbook effective 10/1/2020.

Background

Currently, Trust employees are employees of the Alachua County Board of County Commissioners under Personnel Policy 4.2(1.e). This policy states that:

“Positions funded by the Board of County Commissioners (BoCC) that appear in the approved budget as full-time equivalents, but serve at the pleasure of another Constitutional Officer or under the direction of a different governmental agency. These employees may be housed in a BoCC building and receive a paycheck signed by the Chair of the BoCC, and they may receive other services from County staff; they are not covered by these Employee Policies; they are not under the supervision and control of BoCC employees. These positions will be approved by the BoCC and the other Constitutional Officer or governmental agency in an inter-local agreement or similar document before the position can be filled.”

The intent of the Employee Handbook is to offer two-way communication: what employees of the Trust can expect from the Trust, and what the Trust expects from its employees. The employee handbook was drafted with the assistance of the Trust's employee relations firm, the Krizner Group. Leave and benefits are similar to current leave and benefits offered by the BoCC.

The employee handbook is intended to be adopted as a statement of policy from the Trust

Attachments

Resolution 2020-8
Children's Trust of Alachua County Employee Handbook

Programmatic Impact:

NA

Fiscal Impact:

Fiscal impacts, including provisions for benefits and leave, will be included in the Fiscal Year 2021 budget.

Recommendation:

Staff recommends approval

CHILDREN'S TRUST OF ALACHUA COUNTY
RESOLUTION 2020-8
EMPLOYEE HANDBOOK

WHEREAS, the Children's Trust of Alachua County (CTAC) desires to have employee policies in an Employee Handbook; and

WHEREAS, the Children's Trust of Alachua County desires to adopt the following with the applicable attachments provided herein;

NOW THEREFORE, be it ordained by the Board of the Children's Trust of Alachua County, in the State of Florida, as follows:

SECTION 1: ADOPTION The Employee Handbook attached hereto as Exhibit "A" , is hereby adopted in its entirety as provided in Exhibit "A" and incorporated herein by this reference.

SECTION 2: EFFECTIVE DATE This Ordinance shall be in full force and effect from 10.1.2020 and after the required approval and publication according to law.

PASSED AND ADOPTED BY THE CHILDREN'S TRUST OF ALACHUA COUNTY BOARD. _____.

	AYE	NAY	ABSENT	ABSTAIN
Lee Pinkoson	_____	_____	_____	_____
Dr. Maggie Labarta	_____	_____	_____	_____
Tina Certain	_____	_____	_____	_____
Karen Clarke	_____	_____	_____	_____
Dr. Karen-Cole Smith	_____	_____	_____	_____
Ken Cornell	_____	_____	_____	_____
Dr. Nancy Hardt	_____	_____	_____	_____
Dr. Patricia Snyder	_____	_____	_____	_____
Cheryl Twombly	_____	_____	_____	_____
Susanne Wilson Bullard	_____	_____	_____	_____

Presiding Officer

Attest

X

Lee Pinkoson
Chairman

X

Tina Certain
Treasurer

EXHIBIT “A”



Children's Trust of Alachua County

Alachua County, Florida

Employee Handbook

Compiled: Wednesday, July 29, 2020

Table of Contents

PREFACE

1 CHILDREN'S TRUST OF ALACHUA COUNTY

1.10 WELCOME

1.20 ABOUT THE CHILDREN'S TRUST OF ALACHUA COUNTY

1.21 MISSION, VISION AND GUIDING PRINCIPLES

1.30 PURPOSE OF THE HANDBOOK

1.40 OUR CUSTOMER RELATIONS PHILOSOPHY

1.50 OUR EMPLOYEE RELATIONS PHILOSOPHY

2 EMPLOYMENT AND EMPLOYEE JOB PERFORMANCE

2.10 EMPLOYEE STATUS

2.20 PERSONNEL RECORDS

2.30 USE OF EMPLOYEE PHOTO, LIKENESS AND VOICE

2.40 BIOMETRIC INFORMATION

2.50 EQUAL EMPLOYMENT OPPORTUNITY

2.60 INTRODUCTORY PERIOD

2.70 OUTSIDE EMPLOYMENT

2.80 NEPOTISM

2.90 EMPLOYMENT REFERENCE PROHIBITION

3 WORK SCHEDULE

3.10 WORK HOURS

3.20 WEATHER RELATED CLOSINGS

3.30 WORKING FROM HOME

4 EMPLOYEE LEAVE

4.10 VACATION LEAVE

4.20 SICK LEAVE

4.30 VOLUNTEER TIME OFF (VTO)

4.40 CIVIC DUTIES

4.50 BEREAVEMENT LEAVE

4.60 MEDICAL LEAVE OF ABSENCE

4.70 MILITARY LEAVE OF ABSENCE

4.80 DOMESTIC VIOLENCE LEAVE POLICY

5 STANDARDS OF CONDUCT

5.10 SAMENESS VS CONSISTENCY POLICY

5.20 EDUCATIONAL, DRIVING, CRIMINAL, AND EMPLOYMENT BACKGROUND SCREENING DURING EMPLOYMENT

5.30 THEFT

5.40 CONFIDENTIAL INFORMATION AND PRIVACY

5.50 RESPONSIBILITY FOR ACCURATE AND TRUTHFUL INFORMATION

5.60 ETHICAL COMMUNICATIONS PROCEDURE

5.70 SLEEPING AND INATTENTION

5.80 ABSENTEEISM AND TARDINESS

5.90 INSUBORDINATION

5.100 VIOLATION OF LOCAL, STATE AND/OR FEDERAL LAWS AND SELF-REPORTING OF ARRESTS AND CONVICTIONS POLICY

5.110 MEDICAL MARIJUANA

5.120 GIFT REPORTING

6 SEXUAL AND OTHER ILLEGAL HARASSMENT POLICY AND COMPLAINT PROCEDURE

6.10 DEFINITION

6.20 EXAMPLES OF PROHIBITED CONDUCT

6.30 RESPONDING TO VIOLATIONS OF THIS POLICY

6.40 DISCIPLINE

6.50 DISCRETION

7 WORKPLACE ENVIRONMENT

7.20 ACCOMMODATIONS POLICY

7.30 WORKPLACE CONFLICT POLICY

7.40 OPEN OFFICE ENVIRONMENT

7.50 SCENTS AND FRAGRANCES IN THE WORKPLACE

7.60 SAFETY

7.61 HAZARDOUS AND TOXIC MATERIALS

7.62 WORKPLACE INJURIES

7.63 CONTAGIOUS ILLNESS

7.70 PARKING

7.80 TOBACCO, SMOKING AND SMOKING-ALTERNATIVE PRODUCTS

7.90 DRUG AND ALCOHOL POLICY

7.100 WEAPONS IN THE WORKPLACE POLICY

7.110 SOCIAL EVENTS WITHIN THE WORKPLACE POLICY

7.120 CONSENSUAL ROMANTIC RELATIONSHIPS

7.130 WORKPLACE VIOLENCE

7.140 PERSONAL APPEARANCE/DRESS CODE

7.160 NON-EMPLOYEE SOLICITATION AND DISTRIBUTION POLICY

7.170 CTAC PROPERTY AND VEHICLES

7.180 BULLETIN BOARDS

7.190 VISITORS

8 COMPENSATION AND BENEFITS

8.10 PAY PERIODS

8.20 TIMEKEEPING PROCEDURES

8.30 LOANS AND PAY ADVANCES

8.40 SAFE HARBOR COMPLIANCE

8.50 OVERTIME

8.60 HOLIDAYS

8.70 TRAINING AND EDUCATIONAL ASSISTANCE

8.80 BENEFITS

8.90 BENEFITS CONTINUATION DURING UNPAID LEAVE OF ABSENCE

8.100 FLORIDA RETIREMENT SYSTEM

9 COMMUNICATIONS AND IT POLICY

9.10 EQUIPMENT AND PROPERTY ASSIGNED TO YOU

9.20 COMMUNICATION AND COMPUTER SYSTEMS SECURITY AND
USAGE

9.30 BRING YOUR OWN DEVICE - POLICY AND RULES OF BEHAVIOR

9.40 COMPUTER PASSWORD

9.50 PERSONAL CELL PHONE OR SIMILAR DEVICE USED FOR BUSINESS

9.60 E-MAIL CURFEW

9.70 SOCIAL MEDIA POLICY

9.80 OUR LOGO, TRADEMARK AND BRAND

11 SEPARATION

11.1 NOTICE OF RESIGNATION

11.2 EXIT INTERVIEW

13 ACKNOWLEDGMENT OF RECEIPT OF EMPLOYEE HANDBOOK

13.1 PROMISSORY NOTE POLICY

13.2 ACKNOWLEDGMENT

PREFACE

The Employee Handbook was initially completed in 2020. This Employee Handbook shall be cited as the EHB as an acronym.

This EHB maintains a structure by subject matter using a decimal numbering system identifying the Title, Chapter, and Section (for example: 1.01.010).

- The first number in the sequence (1.01) designates the **Chapter** level
- The second series of numbers (1.**01**) designates the **Section** level

This complete set of numbers is designed to aid in searching the EHB and to assist in subsequent codification as new policies are added to the EHB. Vacant titles, chapters, or sections may be designed for future use and may be marked “Reserved” to ease internal expansion.

To outline, give structure, and more granularly reference the legislation herein, the following list order or pattern of ascending alphanumeric characters is used: **A, 1, a, (1), (A), (a)**. Drafting future legislation with this list order reconciles it with the online code’s list order. To forego the naming of each list item and to more granularly reference legislation that employs alphanumeric characters, use “Part” (always capitalized) followed by the desired alphanumeric reference(s), comma separated. For example, “Part B,7,d”, specifically references item “d”, of item “7”, of item “B”—whereas “Part B” refers more generally to any or all of Part B’s descendants. The legislative history beneath a legislation’s content identifies the specific legal sources, and may be provided to substantiate the online code. The EHB is supplemented from time to time with amendments and additions made by CTAC. NOTICE: THE EMPLOYEE HANDBOOK MAY NOT REFLECT ALL OR THE MOST CURRENT VERSION OF POLICIES ADOPTED BY THE CTAC THAT HAS YET TO BE UPDATED ONLINE. IN THE EVENT OF CONFLICT BETWEEN THE EHB AND A WRITTEN POLICY, THE POLICY TYPICALLY GOVERNS. ALSO, THE EHB MAY NOT REFLECT RULES OR OTHER REGULATIONS PROMULGATED UNDER THE AUTHORITY OF THE CTAC. FOR MORE INFORMATION, CONTACT THE CTAC AT 352-374-1830.

1 CHILDREN'S TRUST OF ALACHUA COUNTY

1.10 WELCOME

1.20 ABOUT THE CHILDREN'S TRUST OF ALACHUA COUNTY

1.21 MISSION, VISION AND GUIDING PRINCIPLES

1.30 PURPOSE OF THE HANDBOOK

1.40 OUR CUSTOMER RELATIONS PHILOSOPHY

1.50 OUR EMPLOYEE RELATIONS PHILOSOPHY

1.10 WELCOME

Welcome to the Children's Trust of Alachua County (CTAC). We are pleased that you are joining us and we know that your contributions will assist us in making a difference in the lives of children in this community.

As an employee of the Children's Trust, you will want to know what you can expect from us and what we expect from you. This Handbook will give you that information by outlining our CTAC's current benefits, practices and policies.

You should keep this Handbook handy as a guide and ready reference throughout your employment here. If you have questions as you read through this Handbook, please do not hesitate to discuss them with your supervisor. Your supervisor is a very important source of information and will be more than glad to assist you.

1.20 ABOUT THE CHILDREN'S TRUST OF ALACHUA COUNTY

The Children's Trust of Alachua County is an independent special taxing district in accordance with Section 125.901, Florida Statute and Alachua County Ordinance 18-08 formed with the Powers and Duties listed below:

- A. To provide and maintain in the County such preventive, developmental, treatment, and rehabilitative services for children as the Trust determines are needed for the general welfare of the County.
- B. To provide such other services for all children as the Trust determines are needed for the general welfare of the County.
- C. To allocate and provide funds for other agencies in the County which are operated for the benefit of children, provided they are not under the exclusive jurisdiction of the public school system.
- D. To collect information and statistical data which will be helpful to the Trust in deciding the needs of children in the County.
- E. To consult with other agencies dedicated to the welfare of children to the end that

the overlapping of services will be prevented.

- F. To lease or buy such real estate, equipment, and personal property and to construct such buildings as are needed to execute the foregoing powers and functions, provided that no such purchases shall be made or building done except for cash with funds on hand or secured by funds deposited in financial institutions. Nothing in this Chapter shall be construed to authorize the issuance of bonds of any nature.
- G. To employ and pay, on a part-time or full-time basis, personnel needed to execute the foregoing powers and functions.
- H. To enter into agreements with government agencies to provide administrative services.
- I. All powers, functions, and duties specified in Section 125.901, Florida Statutes.

1.21 MISSION, VISION AND GUIDING PRINCIPLES

- A. **MISSION:** The Children’s Trust of Alachua County funds and supports a coordinated system of community services that allows all youth and their families to thrive.
- B. **VISION:** Facilitate equitable access and opportunities for all children and families in Alachua County to ensure every child reaches their maximum potential.
- C. **GUIDING PRINCIPLES** are utilized within organizations as a method to align behaviors, guide decision-making, and provide consistency with the Trust’s Board values. The Trust’s Board and stakeholders identified the following guiding principles:
 - 1. Initiatives should ensure accessibility to universal supports for all children 0 to 18 and their families; targeted supports for those who need additional help; and place-based supports for those with the greatest need.
 - 2. Innovative initiatives should be funded that coordinate comprehensive systems of support and delivers those supports in collaborative ways that allows the Trust to achieve collective impact.
 - 3. Initiatives shall be evaluated based on its ability to ultimately impact all children, directly or indirectly, with a priority for long-term continual return on investment.
 - 4. Initiatives must be measurable with priority given to a comprehensive system of supports that provide for prevention, timely intervention, and services that strengthen families and produce achievable results.
 - 5. Initiatives must be aligned to a documented gap or need.

6. Funds will be invested and initiatives will be prioritized based on the highest educational, social, or emotional outcome value.
7. Initiatives will be evaluated in an open, transparent, and competitive manner in order to ensure equitable results and confidence in the process.
8. The Trust values fiscal and operational accountability and will fund partners in a manner that rewards efficiencies, takes advantage of economies of scale, and maximizes services to children or family members/support members in order to meet the educational, social, emotional, and/or physical health.
9. The complete portfolio of Trust investments shall be reviewed to ensure that Alachua County children and families have equitable access to services that will work to increase racial equity.
10. Prior to any funding decision, the direct impact on children must be the primary consideration.

1.30 PURPOSE OF THE HANDBOOK

This Handbook has been prepared to acquaint you with CTAC and to give you a ready reference to answer most of your questions regarding your employment with us. We intend for this handbook to offer two-way communication: what you can expect from us, and what we expect from you. However, the contents of this Handbook constitute only a summary of the employee benefits, personnel policies, and employment regulations in effect at the time of publication. In the case of insurance and pension benefits, the current insurance or pension plan documents will control.

This Handbook supersedes all previous handbooks, policies and practices which are in any way inconsistent with the contents of this Handbook. Finally, this Handbook should not be construed as creating any kind of “employment contract”, since the CTAC reserves the right to add, change or delete benefits and policies as it deems appropriate.

THIS HANDBOOK DOES NOT ALTER THE “AT-WILL” NATURE OF YOUR EMPLOYMENT. YOU HAVE THE RIGHT TO TERMINATE YOUR EMPLOYMENT AT ANY TIME, WITH OR WITHOUT CAUSE OR NOTICE, AND THE CTAC HAS THE SAME RIGHT. YOUR STATUS AS AN “AT-WILL” EMPLOYEE MAY NOT BE CHANGED, EXCEPT IN WRITING, SIGNED BY THE EXECUTIVE DIRECTOR OF THE CTAC.

1.40 OUR CUSTOMER RELATIONS PHILOSOPHY

Our most important goal is citizen satisfaction, within the laws and regulations applicable to our agency. Children, our providing agencies, and taxpayers are the most important

people in the world, and each of us depends on them for our job and our paycheck. Anyone that reaches out to the CTAC deserve quality service and courteous, attentive treatment.

1.50 OUR EMPLOYEE RELATIONS PHILOSOPHY

We are dedicated to continuing what we believe to be an excellent employee relations program. We will do our best to maintain good working conditions, competitive wages and benefits, open communications, and employee involvement.

We know that our reputation is a direct result of the loyalty, commitment and continued efforts of our employees. We sincerely believe that our success will be in no small part to the cooperative relationship between the CTAC and our employees.

If there is something about your job that is bothering you, let's get it out in the open and discuss it. We cannot answer your question or solve your problem unless you tell us what it is, we can do.

Our "Problem Solving Procedure" offers all employees the freedom to discuss anything they wish with their supervisors. Whenever you have a problem, it can usually be resolved by following these steps:

- A. Any concern should first be discussed with your immediate supervisor. Very often, your supervisor is in the best position to handle your problem satisfactorily.
- B. If your supervisor cannot solve the problem or if you are not satisfied after Step 1, you should request to speak to your next level Manager.
- C. If you still feel the need to speak to other members of management after you have spoken with your supervisor and the next level Manager, we encourage you to speak to the Executive Director.
- D. In the event you have a concern, and for personal reasons you cannot follow the steps in this procedure, you may request to go directly to the Executive Director. The Executive Director is available for advice and assistance in solving your problem at any time.

When you inform us of a concern or problem, we will try to answer you as soon as possible under the circumstances.

2 EMPLOYMENT AND EMPLOYEE JOB PERFORMANCE

2.10 EMPLOYEE STATUS

2.20 PERSONNEL RECORDS

2.30 USE OF EMPLOYEE PHOTO, LIKENESS AND VOICE

2.40 BIOMETRIC INFORMATION

2.50 EQUAL EMPLOYMENT OPPORTUNITY

2.60 INTRODUCTORY PERIOD

2.70 OUTSIDE EMPLOYMENT

2.80 NEPOTISM

2.90 EMPLOYMENT REFERENCE PROHIBITION

2.10 EMPLOYEE STATUS

Full-time employees are active employees who are normally scheduled to work forty hours a week. Full-time employees are eligible for all of the benefits set forth in the following pages.

Part-time employees are active employees who are normally scheduled to work fewer than thirty hours a week. Part-time employees are not eligible for benefits.

2.20 PERSONNEL RECORDS

Employee personnel records are the property of CTAC and access is highly restricted. Only management personnel who have a legitimate reason to review the information will be allowed to do so.

Employees may review the information in their own file at the convenience of management and CTAC property. Employees are not permitted to remove, change, delete or otherwise alter any of the information in the file. Additionally, documents or information contained within the personnel files may not be copied.

2.30 USE OF EMPLOYEE PHOTO, LIKENESS AND VOICE

CTAC may take pictures or make recordings of its activities, including specific work tasks or CTAC events to be used in educational, recruiting, or promotional materials. Such materials may be in different media, including the internet. CTAC has provided a Photo and Publicity Release Form to all employees at hiring and will comply with the preference indicated on that form in the use of any employee's Photo, Likeness, or Voice. It is incumbent on the employee to ensure that the form is appropriately completed and, if the employee wishes to change his or her preference, that he or she complete an updated form. The Photo and Publicity Release Form is available from your supervisor or can be found on the CTAC Intranet site.

2.40 BIOMETRIC INFORMATION

CTAC may use biometric information (retina or iris scan, fingerprint, voiceprint, or scan of hand) for building access, office access, work time data collection or attendance data collection.

CTAC does not store your biometric information and collects it solely for legitimate work-related purposes. Once the need for the biometric data has been satisfied, such as when employment ends, the data is permanently destroyed.

Employees are free to decline to use the provided biometric scanners without any adverse employment action and CTAC will use alternative means of access and information collection. Additionally, at any time during employment, employees may revoke their consent to use biometric scanners by providing written notice to the Finance and Administration Manager

By executing the handbook acknowledgement and using the biometric scanners in place at CTAC, you are providing your consent and authorization for CTAC to use your biometric data for the specific purposes stated above.

2.50 EQUAL EMPLOYMENT OPPORTUNITY

We are committed to providing equal opportunity in all of our employment practices, including selection, hiring, promotion, transfer, and compensation, to all qualified applicants and employees without regard to age, race, color, sex, religion, national origin, marital status, gender identity or expression, or sexual orientation, disability or any other protected status in accordance with the requirements of all federal, state and local laws.

2.60 INTRODUCTORY PERIOD

For every new employee, the first 90 days of full-time employment is an introductory period for both you and the CTAC. During this time, you will have the opportunity to learn about the CTAC, your job, and your new surroundings. Your supervisor will be available to answer any questions that you may have.

During this period your job performance, attendance, attitude and overall interest in your job will be carefully reviewed by your supervisor. The CTAC will then evaluate your performance and make a decision concerning your continued employment.

If, as a result of an illness or injury, you are absent from work for more than five days during your introductory period, we may choose to extend your introductory period as necessary to give you a fair opportunity to demonstrate your ability to do the job. If your introductory period is extended, you will be notified.

Should an employee's performance become unsatisfactory at any time during this introductory period, the employee will be subject to discharge at that time. If CTAC terminates an employee for unsatisfactory work performance during their introductory

period, CTAC's account will not be charged for unemployment benefits. Completion of the introductory period does not confer any expectation of continuation in employment; continuation depends on the needs of CTAC and the performance and conduct of the employee.

2.70 OUTSIDE EMPLOYMENT

There have been times when most of us have had the opportunity or the need to have two jobs at one time. However, it is important that other employment and outside interests do not interfere in any way with your job at this CTAC. If you do hold a second job, we expect that you will be careful that extra hours of work do not affect your performance here.

If your second job could create a potential conflict of interest, for example, working for a competitor, you are expected to discuss the matter with the Executive Director.

2.80 NEPOTISM

The CTAC prohibits working relationships between members of the same family in which one such employee has supervisory or managerial authority over the other family member. Supervisory or managerial authority includes hiring, promotion, salary, performance evaluation and other staffing decisions. For the purpose of this policy, family member is defined as a spouse, domestic partner, romantic partner, children, parents, siblings, nieces, nephews, grandparents, grandchildren, aunts, uncles, first cousins, and corresponding in-law or step relationships. If such a relationship is discovered, the CTAC will take all necessary measures, including separation of employment, to rectify the violation of this policy.

2.90 EMPLOYMENT REFERENCE PROHIBITION

The CTAC prohibits leaders and employees alike from providing employment reference information to third parties, including prospective employers. Any and all solicitations for reference information should be immediately directed to the Finance and Administration Manager for appropriate management. The Finance and Administration Manager shall only provide a former employee's position title, dates of employment, and whether such employee is eligible to be rehired absent court mandate or a contractual agreement to the contrary. Such policy has been designed to protect both employees and the CTAC from liability.

3 WORK SCHEDULE

3.10 WORK HOURS

3.20 WEATHER RELATED CLOSINGS

3.30 WORKING FROM HOME

3.10 WORK HOURS

Our normal workweek is as follows: 8:30 a.m. to 5:00 p.m., Monday through Friday. However, due to changing production requirements, your actual work schedule may vary. Please contact your supervisor if you have any questions.

3.20 WEATHER RELATED CLOSINGS

It is our policy to consider the safety of our employees and those we serve when making decisions regarding remaining open during periods of inclement weather. Where extraordinary circumstances warrant, we will close the facility. During periods of adverse weather, employees are encouraged to [listen to radio broadcasts, contact their manager, etc.] to find out if their work location is closed on a given day. Our decision to close will be made by 7:00 a.m. on the day of the closing. If the facility remains open, but you are unable to report to work, you should follow our standard procedures for notification of an unscheduled absence.

If the facility remains open, employees who report to work will receive their normal pay for the day. Those not reporting to work on a facility open day, will be required to use any available paid time off for the missed day. Employees will receive their regular pay for the day of closure.

Even if a facility is closed, there may be key positions that will need to report to work. Individuals in those positions will be notified by management with the details of the assignment. Employees who are required to work when a facility is closed will receive their normal pay for the hours worked.

3.30 WORKING FROM HOME

It is the policy of the CTAC to allow designated employees to telecommute where it is reasonable and practical to do so and where the operational needs of CTAC will not be adversely affected.

A. Definitions:

1. **Alternate Work Location.** The primary location from which a telecommuting employee works using a technology-based platform, such as a networked computing device connected to the employee's official work location via CTAC's computer network

2. **Authorized Persons.** Those persons who have been granted access rights to CTAC's information technology resources by the Board of County Commissioner's IT Department at the direction of the Executive Director.
 3. **Official Work Location.** The location of the office to which the employee is assigned. By default, the official work location of employees who work from alternate work locations is the official work location of the employee's supervisor. In all cases of such designations, the location must be in the best interest of CTAC. An employee may have only one official work location.
 4. **Telecommuting.** Working at an alternate work location that is linked electronically to a central office or official work location. Telecommuting is a cooperative arrangement between CTAC and an employee, based upon the needs of the job, work group and CTAC. Telecommuting is not a formal, universal employee benefit. Rather, it is a voluntary alternative method of meeting the needs of CTAC. This policy does not apply to situations where a supervisor occasionally allows an employee to work at home on a temporary, irregular basis.
 5. **Compensation and Work Hours:** The employee's compensation, benefits, work status and work responsibilities will not change due to participation in the program. The amount of time the employee is expected to work per day or pay period will not change as a result of participation in the program.
- B. **Eligibility.** A request by an employee to participate in the program must be evaluated by management to ensure the request meets eligibility criteria and that the work to be performed is suitable for telecommuting. The request will also be evaluated based on the availability of necessary equipment and resources as well as whether the arrangement would benefit the organization. To become and remain eligible to participate in the program, an employee must meet the following minimum criteria:
1. The employee must maintain an overall satisfactory performance evaluation rating.
 2. The employee must not be under any form of disciplinary action(s) or have documented performance deficiencies.
 3. The employee must agree to the requirements stipulated in the Children's Trust of Alachua County Telecommuting Agreement.
 4. The employee must agree to attend all required meetings and training programs at locations designated by the employee's supervisor or the Executive Director.

5. The employee's participation in the program must be approved by the employee's supervisor and the Executive Director.
6. The employee must have a high-speed internet connection (DSL, Cable, etc.).
7. The employee must continue to comply with federal, state and local laws and regulations while at the alternate work location.
8. The employee must utilize company approved remote access methods to connect to CTAC's network.

C. Job Responsibilities. An employee participating in the program is subject to the same rules, policies and procedures regarding attendance, leave, job performance, performance evaluations, discipline and separation as an employee not participating in the program.

1. The employee is expected to meet with their supervisor to receive work assignments and to review completed work as necessary on a schedule to be determined by the supervisor.
2. The employee will continue to complete all assigned work according to work procedures, guidelines, and performance standards. The employee will be available for staff meetings and other meetings deemed necessary by management.
3. The employee must be available by phone and email during work hours. Business meetings must not take place at the alternate work location. All face-to-face interactions with clients, vendors, providers and other stakeholders must not be conducted at the alternate work location.

D. Workspace.

1. The employee shall designate a workspace at the alternate work location for placement and installation of equipment to be used while telecommuting.
2. The employee shall maintain this workspace in a safe condition, free from hazards and other dangers to the employee and equipment. CTAC must approve the site chosen as the employee's remote workspace.
3. Any company materials taken home should be kept in the designated work area at home and not be made accessible to others. CTAC has the right to make on-site visits (with 24 hours advance notice) to the alternate work location for purposes of determining that the site is safe and free from hazards, and to maintain, repair, inspect or retrieve company-owned equipment, software, data or supplies.

E. Equipment.

1. CTAC may provide equipment for the employee to perform his/her job duties at the alternate work location. This may include computer hardware and software as well as other applicable equipment as deemed necessary. The use of equipment when provided by CTAC for use at the alternate work location is strictly limited to authorized persons and for purposes relating to company business.
2. Company owned equipment will continue to be maintained by CTAC, but the user is responsible for protecting the equipment from damage and misuse. If maintenance is required on the equipment it is the responsibility of the telecommuter to return the equipment to CTAC for service.
3. The employee is expected to establish safeguards to ensure the alternate work location is free from hazards to the employee and company owned equipment. With 24-hour advance notice, CTAC may inspect the alternate work location to ensure proper maintenance of company owned equipment.
4. Company equipment must be returned upon request. When the employee uses her/his own equipment, the employee is responsible for maintenance and repair of that equipment. CTAC will not be liable for costs related to the purchase or maintenance of employee owned equipment and will not be liable for utility expenses associated with telecommuting.
5. Employee owned computer equipment utilized in the program must have appropriate firewall protection, up-to-date anti-virus protection and updated operating systems with all appropriate update patches applied. Employees using a home wireless network must:
 - a. Change Default Administrator Passwords and Usernames
 - b. Turn on WEP or WPA Encryption
 - c. Change the Default SSID
 - d. Enable MAC Address Filtering
 - e. Disable SSID Broadcast
 - f. Assign Static IP Addresses to Devices
 - g. Position the Router or Access Point Safely
 - h. The CTAC telecommuting program should be consulted if assistance is needed with any of the above requirements.

F. Security and Confidentiality. The employee must comply with all company policies regarding information resources, security and confidentiality.

1. All information should be treated as confidential and should not be disclosed to unauthorized entities or individuals.
 2. The employee shall protect company data from unauthorized use and disclosure or damage as set forth in agency policies and shall comply with the public records requirements set forth in Chapter 119, Florida Statutes.
 3. All records, papers, documents and correspondence must be safeguarded in a locked storage container when the work area is unoccupied.
 4. Release or destruction of any records may be done only at the user's official work location in accordance with governing agency policies and procedures.
 5. All files and data created by any user while utilizing agency IT resources are official agency records governed by this and other relevant agency operating procedures.
 6. A periodic review of the alternate work location by agency staff may occur with at least 24-hour advance notice to ensure compliance with the appropriate security and confidentiality protocols.
 7. Any noncompliance could result in revocation of telecommuting computer related privileges and/or disciplinary action. All laptop computer hard drives accessing confidential information must be encrypted.
 8. Employees are forbidden from saving company data on any removable media device (USB drive, CD, floppy drive, etc.).
- G. Office supplies. Will be provided by CTAC as needed. Out-of-pocket expenses for other supplies will not be reimbursed unless by prior approval of the employee's manager.
- H. Workers Compensation. Employees in the program are covered under the Workers' Compensation Act if injured in the course of performing official duties at the telecommuting site. An employee's claim for benefits or services will be governed by Chapter 440, Florida Statutes. If an injury is determined to have been caused by employee negligence or employee failure in maintaining safe working conditions over which the employee has or had control, the employee may be subject to disciplinary action. If an employee is injured in a work-related accident at the alternate work site, (s)he must notify the supervisor immediately and complete all necessary and/or management requested forms and documents related to the injury.
- I. Liability. CTAC assumes no liability for injuries occurring at the alternate work site to individuals not employed by CTAC. This includes family members, visitors, or others that may be injured within or around the employee's home.

CTAC is not liable for loss, destruction, or injury that may occur in or to the employee's home.

- J. Travel. CTAC will not, unless it is deemed in its best interest, pay for travel costs if the employee needs to return to the official work location or if the employee needs to attend meetings and/or trainings at locations designated by CTAC. CTAC will pay for travel costs for travel that would have been normally incurred if the employee had been working from their official work location. In that case, CTAC will pay via travel reimbursement, according to agency travel policy. The amount reimbursed will be either the cost of travel from the official work location or the alternate work location to the destination, whichever is less.
- K. Dependent Care. Telecommuting is not to be utilized for providing care for others at home. An employee participating in the program is required to have adequate arrangements for care giving while participating in the program. CTAC may require documentation of the care giving arrangements upon request
- L. Income Tax. Employees are responsible for any tax benefits or burdens related to use of the alternate work location for work purposes. CTAC will not be responsible for tax advice or tax consequences resulting from the employee's participation in the program.
- M. Termination. Participation in the program may be terminated at any time by the employee or the supervisor. The employee must be given notice of not less than ten (10) business days that the employee's participation in the program will be terminated, after which the employee is expected to return to work full time at their official work location. Terminations of participation in the program that are related to employee discipline or work performance deficiencies are not subject to the ten (10) business days notice provision.

4 EMPLOYEE LEAVE

4.10 VACATION LEAVE

4.20 SICK LEAVE

4.30 VOLUNTEER TIME OFF (VTO)

4.40 CIVIC DUTIES

4.50 BEREAVEMENT LEAVE

4.60 MEDICAL LEAVE OF ABSENCE

4.70 MILITARY LEAVE OF ABSENCE

4.80 DOMESTIC VIOLENCE LEAVE POLICY

4.10 VACATION LEAVE

- A. Granting Leave. New employees that are eligible for Vacation Leave are provided this benefit after their 90-day introductory period. Vacation Leave will accrue during their probationary period, but will not become available to the employee until the probationary period has concluded. Paid time off will not be counted as hours worked for the purposes of determining overtime.
- B. Accrual of Leave. Vacation leave shall be earned as of the last day of each pay period and shall accrue provided the employee is in active pay status for at least 75% of the pay period. Employees will be allowed to accrue vacation leave with no cap during the calendar year, but will only be allowed to carry 280 hours for employees assigned to a 40-hour work week. Vacation leave shall be accrued in accordance with the schedule shown in the table below. The Vacation Leave allotment shown is for eligible full-time employees. It is based on a 40-hour work schedule. The PTO allotment will be prorated based on worked schedule for those employees assigned a work schedule of more than 30 hours per week but less than 40 hours per week. For example, an employee working 30 hours would receive $\frac{3}{4}$ of the values shown in the above schedule. Employees working less than 30 hours per week are not eligible for paid time off. This leave can be used for vacation, personal days, alternative holidays in excess of the two floating holidays, military duty, education, etc.

Length of Service in Years	Hours per pay period	In weeks
Less than 1 year	3.24 hours	2.106 weeks
Between 1 year and 5 years	3.85 hours	2.5 weeks
Between 5 years and 10 years	4.62 hours	3 weeks
Between 10 years and 15 years	5.38 hours	3.5 weeks
Between 15 years and 20 years	6.92 hours	4.5 weeks
Between 20 years and 25 years	8.46 hours	5.5 weeks

25 years or more	9.23 hours	6 weeks
------------------	------------	---------

- C. Using Leave. Employees are encouraged to take vacation leave within the calendar year. An employee shall be granted vacation leave only for those hours accrued prior to or during the requested vacation period. The following conditions apply:
1. Vacation leave shall not be used in increments of less than fifteen minutes.
 2. Exempt employees are not required to use leave benefits for absences of less than four consecutive hours in duration.
 3. Whenever possible, all requests for vacation leave shall be submitted in writing in at least two weeks in advance.
 4. Except in extenuating circumstances, an employee must receive prior approval from the employee's supervisor.
 5. Vacation leave requests shall be granted at the discretion of the supervisor; however, every effort will be made to accommodate employees.
 6. The use of vacation leave to cover tardiness and cash payment in lieu of time off is not authorized.
- D. Compensation for unused leave. Separating employees shall be paid for all unused, accrued vacation leave earned through the date of separation, up to a maximum of 280 hours for employees assigned to a 40-hour work week. Deferred Retirement Option Program (DROP). Employees who choose to participate in the Florida Retirement System's Deferred Retirement Option Program (DROP) may elect to be paid for any or all of their unused, accrued vacation leave, earned through their date of beginning participation in DROP. At separation, the employee will be paid only for the balance not paid at the beginning of the DROP period, up to 280 hours.

4.20 SICK LEAVE

- A. Granting Leave. Full time employees assigned to a 40-hour work week shall earn four hours of paid sick leave per pay period.
- B. Accrual of Leave. Sick leave shall be earned as of the last day in the pay period and shall accrue provided the employee is in active pay status for at least 75% of the pay period.
- C. Using Leave. All requests for sick leave shall be in writing and approved by the appropriate supervisor or designee prior to use; however, in the event prior notification is not possible, an employee must immediately contact the

employee's supervisor regarding the intended absence.

1. An employee shall be granted sick leave only for those hours accrued prior to or during the pay period. Approval of sick leave requests is at the discretion of the supervisor.
2. Any request for which the Family/Medical Leave Act (FMLA) may be applicable must be approved pending certification of the sick leave instance as FMLA. the leave will not be coded as FMLA until the medical certification designating the illness or injury as FMLA is received from the employee's medical provider.
3. Sick leave may only be utilized for employee illness, injury, disability, pregnancy, pregnancy related conditions or quarantine by health authorities or a physician. Sick leave may also be used by the employee to care for an immediate family member because of an illness, injury, disability, pregnancy, pregnancy related conditions or quarantine by health authorities or a physician.
4. Sick leave may be used for the employee's doctor/dental appointments or other foreseeable medical appointments/treatment only if prior supervisory approval has been obtained. Sick leave may be used to transport or accompany the employee's immediate family member to doctor/dental appointments or for other foreseeable medical appointments/treatment only if prior supervisory approval has been obtained.
5. An employee may be required to supply proof of sickness, injury or disability. Reasons for requiring proof may include, but are not limited to:
 - a. A pattern of use of sick leave in conjunction with a holiday, use of annual leave, days off, weekends, work assignment deadlines, etc.
 - b. If the employee is sent to a physician of the Trust's choosing for the purpose of providing proof of illness or ability to perform at work, the Trust will pay the expenses. Upon exhaustion of sick leave, an employee may request use of accumulated vacation leave rather than applying for leave without pay.

D. Pregnancy. The sick leave policy is applicable to pregnancy, childbirth, miscarriage or recovery from any of these conditions.

1. Should pregnancy, childbirth or miscarriage result in sickness to the mother or child(ren), a father may use sick leave to care for the mother or child(ren).
2. The mother or father may, for up to six weeks, use sick leave for the recovery of the mother after birth.

3. Medical documentation is required to use sick leave for more than six weeks after birth.

E. Compensation for Unused Leave. Employees, upon separation and with ten (10) years of continuous service, will be entitled to payment at the employee's current pay rate for 50% of all unused, accrued sick leave up to a maximum payout of 500 hours (1,000 hour accrual) for employees regularly scheduled to work a forty (40) hour work week.

4.30 VOLUNTEER TIME OFF (VTO)

A. Purpose. In an effort to strengthen our culture of service, improve our local communities and provide meaningful leadership opportunities for staff, CTAC will allow each employee a total of eight volunteer hours off (VTO) in addition to their paid time off. The eight hours break down as follows:

1. In hourly increments to be used during different calendar days throughout the year.
2. 8 consecutive hours off (or 1 day) for personal volunteering by the employee.

B. Pay. VTO will be considered paid time off. The pay rate will be the employee's current base salary on the day(s) the time is taken. Employer-related volunteerism is not included in these hours. Employees will be able to use work hours for CTAC sponsored events, provided it is approved by his/her manager. VTO hours do not qualify as physical hours worked and are not part of the 40 physical work hours required in order to receive overtime pay.

C. Frequency. VTO is refreshed at the beginning of each calendar year, unless the program is amended or discontinued, and does not accrue from year to year. Usage of this time or lack thereof does not affect paid time off (PTO) accrual or usage. VTO cannot be converted to regular PTO.

D. Eligibility. All employees of CTAC are eligible to participate in this program. There is no minimum service requirement for participation in this program. You are ineligible to participate in the program, if:

1. The employee is on Performance Counseling.
2. The Program is discontinued. The CTAC reserves the right to amend or terminate this program at any time without prior notice. CTAC also reserves the right to deny approval for a VTO if CTAC does not believe the request is consistent with the intent of the Program.

E. Approval. Employees must request and submit it to his/her manager at least two weeks before the requested time off. Approval is at the discretion of the

employee's manager. The CTAC-sponsored VTO may not be used for organizations that discriminate based on creed, race, religion or sexual orientation.

F. Appropriate Use. Examples of appropriate uses for VTO:

1. Building a house for Habitat for Humanity
2. Donating your time at a food bank
3. Cleaning up the beach, highway or park
4. Tutoring disadvantaged young adults
5. Participating in Big Brother/Big Sister programs
6. Reading to a classroom or chaperoning a school field trip
7. Participating in a garage/yard sale where the proceeds benefit the Red Cross
8. Volunteering at a PTA sponsored event (i.e., book drive)

G. Inappropriate Use. Examples of inappropriate uses for VTO:

1. Helping your neighbor paint their house
2. Attending a professional, religious, political or personal interest conference
3. Taking a ski vacation and charitably giving ski lessons
4. Taking a college or college-prep course class
5. Coaching your child's basketball team
6. Attending your child's class play or recital
7. Holding a garage/yard sale
8. Attending a PTA, HOA, or other non-profit organization meetings
9. Participation in a group that does not support the values of CTAC.

4.40 CIVIC DUTIES

We encourage each of our employees to accept his or her civic responsibilities. As a good corporate citizen, we are pleased to assist you in the performance of your civic duties.

- A. Jury Duty. If you are called to jury duty, please notify your supervisor immediately so we can plan the department's work with as little disruption as possible. Employees who are released from jury service before the end of their regularly

scheduled shift or who are not asked to serve on a jury panel are expected to call their supervisor as soon as possible and report to work if requested. Employees are not required to take leave if called upon for jury duty.

- B. Voting. We want every employee to have the opportunity to vote in every election. Generally, there will be sufficient time to vote either before or after your scheduled shift. However, if you foresee a problem getting to the polls, please notify your supervisor so that arrangements can be made.

4.50 BEREAVEMENT LEAVE

Full-time employees are eligible to receive up to three days paid bereavement leave in the event they miss regularly scheduled workdays due to the death or funeral of a member of the employee's immediate family. Your immediate family includes your spouse, children, stepchildren, parents, grandparents, grandchildren, brother or sister, your spouse's parents, domestic partner, and any other relative residing in the same household.

An employee who is notified of a death in his or her immediate family while at work will be paid for the remainder of the scheduled hours that day. The three-day eligibility for paid bereavement leave will not commence until the next regularly scheduled workday which is lost. All time off in connection with the death of one of the above-listed individuals should be scheduled with your supervisor.

4.60 MEDICAL LEAVE OF ABSENCE

Full-time employees who have completed their introductory period are eligible for unpaid leaves of absence for medical reasons. Medical reasons may include illness, injury, medical and surgical procedures, pregnancy, childbirth, and related medical conditions. Employees must request a leave of absence if they will be unable to work for medical reasons for a period in excess of seven consecutive days. Such requests must be accompanied by a statement, acceptable to CTAC, from the employee's physician or a CTAC-approved physician indicating that the employee is unable to return to work. CTAC retains the right to have employees on a leave of absence examined by a physician of CTAC's choice. However, in no event may an employee's total leave of absence exceed six months in any 12-month period. During a medical leave of absence, you can keep your insurance benefits in effect by paying the appropriate premiums, subject to policy terms and conditions. Please make arrangements with the Finance and Administration Manager for these payments.

Upon the employee's return from medical leave of absence, we will attempt to return the employee to his or her regular job if it is available. If it is not available, the employee will be placed on a similar job for which the employee is qualified, if such a job is available. If no jobs are available at the time, the returning employee will be given preferential consideration for any position for which he or she applies.

Failure to report to work as scheduled following a leave shall be cause for dismissal. Time spent on leaves of absence will not be used for computing benefits such as vacation or holidays.

4.70 MILITARY LEAVE OF ABSENCE

Employees who require time off from work to fulfill military duties will be treated in accordance with applicable requirements of state and federal laws. You are expected to notify your supervisor of upcoming military duty by providing us with a copy of your orders as soon as possible.

4.80 DOMESTIC VIOLENCE LEAVE POLICY

Any employee who has worked for CTAC is entitled to take three days of unpaid leave if they or a member of their immediate household have been the victim of domestic violence and need to engage in any of the following activities: (1) to seek an injunction for protection against domestic violence or repeat of sexual violence, (2) to obtain medical care or mental health counseling for the employee or the household member to address issues resulting from domestic violence, (3) to obtain services from a victim services organizations, (4) to make the employee's home secure from the perpetrator of domestic violence or to relocate to a new location to escape the perpetrator, or (5) to seek legal assistance to address issues that arose from the domestic violence or to attend or prepare for a court related proceeding relating to an act of domestic violence. Employees must provide appropriate advance notice to their supervisor of the need for leave unless they are prevented from doing so because of imminent danger. All employees must first exhaust any available annual paid time off leave before being eligible to use domestic violence leave.

5 STANDARDS OF CONDUCT

5.10 SAMENESS VS CONSISTENCY POLICY

5.20 EDUCATIONAL, DRIVING, CRIMINAL, AND EMPLOYMENT BACKGROUND SCREENING DURING EMPLOYMENT

5.30 THEFT

5.40 CONFIDENTIAL INFORMATION AND PRIVACY

5.50 RESPONSIBILITY FOR ACCURATE AND TRUTHFUL INFORMATION

5.60 ETHICAL COMMUNICATIONS PROCEDURE

5.70 SLEEPING AND INATTENTION

5.80 ABSENTEEISM AND TARDINESS

5.90 INSUBORDINATION

5.100 VIOLATION OF LOCAL, STATE AND/OR FEDERAL LAWS AND SELF-REPORTING OF ARRESTS AND CONVICTIONS POLICY

5.110 MEDICAL MARIJUANA

5.120 GIFT REPORTING

5.10 SAMENESS VS CONSISTENCY POLICY

CTAC strives to ensure fair treatment of all employees. It is in the best interest of CTAC to ensure that disciplinary and corrective actions are prompt, consistent and impartial and most importantly, correct the problem, prevent recurrence and prepare the employee for satisfactory service in the future.

It is important that employees realize that the same infraction committed by different employees holding different positions may, at times, result in different corrective action procedures. It is the responsibility of our managers and human resource team to review the totality of events, including the tenure, performance record, and previous unrelated infractions of the individual(s) involved to ensure that the corrective action or termination decision is reasonable and appropriate for the offense.

Here's an example of why the same corrective action for the same infraction is not appropriate. Consider three employees that each fall asleep while they are on duty. One is a Fiscal Assistant, the second is the Receptionist and the third is an employee that is responsible for regularly operating a motor vehicle. When the Fiscal Assistant is caught sleeping on the job, a verbal warning may be appropriate. When the Receptionist falls asleep at the front desk, a final written warning may be issued instead because of the role's public nature. But falling asleep while operating a CTAC vehicle would result in immediate termination, without warning, for the third employee because of the obvious safety concerns. The circumstances surrounding the infraction determine the appropriate level of discipline more than the infraction itself.

The goal is to administer corrective actions in a manner that best serves CTAC and results in satisfactory performance.

5.20 EDUCATIONAL, DRIVING, CRIMINAL, AND EMPLOYMENT BACKGROUND SCREENING DURING EMPLOYMENT

CTAC must be able to employ individuals that are trustworthy and able to properly interact with key CTAC partners. Employees agree, by signing the acknowledgment provision verifying agreement to this handbook, that CTAC may conduct occasional criminal, employment, driving and educational backgrounds on employees as it deems necessary to conduct its operation in a profitable and legal manner. CTAC reserves the right to take any and all action it deems necessary to act upon the results of such ongoing screening.

5.30 THEFT

We do not tolerate theft in any form. In order to protect you, your co-workers, our customers and CTAC, we reserve the right to inspect all lockers, desks, toolboxes, purses, briefcases, packages, vehicles and any other personal property which is brought onto CTAC property. If you wish to remove any CTAC property - including scrap - from the premises, you must obtain written permission in advance from your supervisor.

5.40 CONFIDENTIAL INFORMATION AND PRIVACY

Employees may, by virtue of their employment with the CTAC, obtain access to sensitive, confidential, restricted and proprietary information about CTAC, its customers and clients, and its employees. Such information is not generally known or made available to the public or others and which the CTAC has made reasonable efforts to keep confidential. This includes but is not limited to financial records, employee and customer records, telephone numbers, email addresses, files, referral or mailing lists, credit card numbers and similar information, whether in paper form, in computers or otherwise.

Such confidential information shall be used solely by employees in the performance of their job duties for CTAC and shall not be used in any other manner during their employment. Employees shall not without the prior written consent of CTAC use, disclose, divulge, or publish to others any such confidential information acquired in the course of their employment. Such confidential information is the exclusive property of CTAC and under no circumstances whatsoever shall employees have any rights to use, disclose or publish to others such confidential information subsequent to the termination of their employment.

Unauthorized use or disclosure of confidential information may result in discipline, up to and including immediate discharge, prosecution, or other available action.

Upon termination of employment, employees must deliver to CTAC any and all confidential information whether stored electronically or as a document, including but not limited to all copies of such documents prepared or produced in connection with their employment with the CTAC that pertain to the CTAC's business or the employee's

services for CTAC, whether made or compiled by the employee or furnished to the employee in connection with such services to CTAC. In addition, at termination, employees must return to CTAC all of CTAC's non-confidential property, documents, or electronic information.

This policy does not limit the common law and statutory rights of CTAC.

5.50 RESPONSIBILITY FOR ACCURATE AND TRUTHFUL INFORMATION

Employees of the CTAC are responsible for providing accurate and truthful information to CTAC in all aspects of the employment relationship. This obligation begins with an employee's application and all information submitted to CTAC prior to hire and is a continuing obligation through an employee's tenure with the CTAC. This includes, but is not limited to, all information an employee submits regarding his or her internal administrative and benefit-related documentation, all records of time worked, all input regarding any form of performance evaluation or corrective action plan, and as related to an employee's performance of his or her job duties. Any violation of this obligation on the part of the employee will result in discipline upon discovery of the false information, with the likelihood such actions will lead to termination of employment.

5.60 ETHICAL COMMUNICATIONS PROCEDURE

All CTAC employees must abide by a code of wholly ethical communications with peers, supervisors, employees, vendors, and membership. Ethical communication enhances human worth and dignity by fostering truthfulness, fairness, responsibility, personal integrity, and respect for self and for others. As such, the following rules should be expressly followed to avoid violating such code:

- A. Communicate any and all concerns regarding another's behavior directly with the individual. Sharing such concerns with others that do not have a legitimate reason to know such concerns may quickly amount to gossip - one of the most damaging practices in any workplace.
- B. Avoid argumentative tones and comments. Employees should state their position clearly and factually in a normal tone, allowing the other individual an opportunity to share their position, and inviting open discussion regarding both such positions.
- C. Honesty is always the best procedure. It is critical that employees never engage in deceit, exaggeration, or express dishonesty when dealing with other individuals. While some communication may be extremely difficult to have, employees are always expected to provide them in a candid, but respectful manner.
- D. Respect issues of confidentiality. Employees of CTAC will be faced with topics of great confidentiality at times and, as such, must avoid sharing any such information with anyone not intended to be part of such confidentiality. This

procedure speaks only to issues of confidentiality related exclusively to CTAC's purpose and mission and should not be interpreted to include gossip, personal information, and other topics not related to CTAC itself.

Any employee found violating any portion of this procedure may be subject to disciplinary action, up to and including termination.

5.70 SLEEPING AND INATTENTION

We expect every employee to be fully alert while on the job to ensure the safety of all employees and to properly serve our customers. Therefore, we cannot tolerate sleeping or inattention on the job.

5.80 ABSENTEEISM AND TARDINESS

Each of our employees plays an important role in getting the day's work done. Therefore, each employee is expected to be at his or her workstation on time each day. Absenteeism or tardiness, even for good reasons, is disruptive of our operations and interferes with our ability to satisfy our customers' needs. Excessive absenteeism or tardiness can result in discipline, up to and including discharge.

If you are going to be late or absent from work for any reason, you must personally notify your supervisor as far in advance as possible so that proper arrangements can be made to handle your work during your absence. Of course, some situations may arise in which prior notice cannot be given. In those cases, we expect you to notify your supervisor as soon as possible. Leaving a message does not qualify as notifying your supervisor - you must personally contact your supervisor.

When absence is due to illness, CTAC reserves the right to require appropriate medical documentation.

5.90 INSUBORDINATION

We expect every employee to follow the instructions of supervisors and other management officials. Failure to do so constitutes insubordination. Insubordination is detrimental to departmental and organizational goals. Employees who are insubordinate to their superiors are subject to disciplinary action.

5.100 VIOLATION OF LOCAL, STATE AND/OR FEDERAL LAWS AND SELF-REPORTING OF ARRESTS AND CONVICTIONS POLICY

Anyone known to be violating a local, state, and/or federal law on CTAC property or at a CTAC-supported function will be subject to referral for prosecution to the appropriate law enforcement agency.

All employees are required to self-report the following information to their immediate

supervisor within forty-eight (48) hours:

- A. any arrests/charges that are considered a felony.
- B. any conviction, finding of guilt, withholding of adjudication, commitment to a pretrial diversion program, or entering of a plea of guilty or Nolo Contendere for any criminal offense other than a minor traffic violation.

For purposes of this policy a minor traffic violation is defined as a non-criminal violation that may require community service hours but is not punishable by incarceration and for which there is no right to trial by jury. Criminal traffic violations, including driving under the influence of alcohol and/or drugs, are not minor and must be reported.

Any employee in violation of the reporting requirements of this policy may be subject to disciplinary action up to or including dismissal.

5.110 MEDICAL MARIJUANA

If an applicant or employee with a legal referral for marijuana (for the treatment of a medical condition) tests positive based on the substance limits for the drug test, it will be reported by the lab as a “positive drug test” and will be treated in accordance with all other positive drug tests.

Employees and applicants shall be given an opportunity to provide any information relevant to the test, including identification of currently or recently used prescription or non-prescription medications as well as any legal referral for marijuana use for the treatment of a medical condition.

There are no additional exceptions for applicants or employees with legal referrals for marijuana.

5.120 GIFT REPORTING

CTAC employees are prohibited from soliciting or accepting cash or gratuities of any amount from any person or entity doing business with CTAC. Additionally, unless specifically permitted by this policy, CTAC employees are also prohibited from accepting any and all non-cash gifts, including materials, meals, services, travel, entertainment, attendance at a charitable or similar event as a guest at no cost or at unreasonably discounted prices from person or entities proposing to do or actually doing business with the CTAC. The only exceptions to this policy are as follows:

- A. holiday business gifts of value totaling less than twenty-five dollars (\$25) in any single year that are for the shared departmental use or consumption.
- B. occasional meals in connection with actual business.
- C. awards or gifts provided by CTAC in express and open recognition of an

employee's contributions.

All unpermitted gifts must be immediately declined, returned or discarded. Employees must report to their supervisors and the Finance and Administration Manager before the end of each month regarding all gifts received during the month. Employees found in violation of this policy will be subjected to immediate disciplinary action, up to and including termination of employment.

6 SEXUAL AND OTHER ILLEGAL HARASSMENT POLICY AND COMPLAINT PROCEDURE

6.10 DEFINITION

6.20 EXAMPLES OF PROHIBITED CONDUCT

6.30 RESPONDING TO VIOLATIONS OF THIS POLICY

6.40 DISCIPLINE

6.50 DISCRETION

6.10 DEFINITION

Harassment is a form of predatory sexual behavior in which a person targets another employee(s) relating to an individual's age, race, color, sex (including same-sex sexual harassment), religion, national origin, gender identity or expression, or sexual orientation, or disability. It constitutes discrimination and is illegal under federal, state and local laws. For the purposes of this policy, "sexual harassment" is defined, as in the Equal Employment Opportunity Commission Guidelines, as unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature when, for example: a) submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment, b) submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual, or c) such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment.

Title VII of the Civil Rights Act of 1964 recognizes two types of sexual harassment: a) quid pro quo and b) hostile work environment. Sexual harassment may include a range of subtle and not-so-subtle behaviors and may involve individuals of the same or different gender. Depending on the circumstances, these behaviors may include unwanted sexual advances or requests for sexual favors; sexual jokes and innuendo; verbal abuse of a sexual nature; commentary about an individual's body, sexual prowess or sexual deficiencies; leering, whistling or touching; insulting or obscene comments or gestures; display in the workplace of sexually suggestive objects or pictures; and other physical, verbal or visual conduct of a sexual nature.

This policy applies to all employees of CTAC working at all locations. All employees have an obligation to report sexual harassment - even if they are not the victim.

All workers, including supervisors and managers, will be subject to discipline, up to and including discharge, for any act of sexual harassment they commit.

6.20 EXAMPLES OF PROHIBITED CONDUCT

Though sexual harassment encompasses a wide range of conduct, some examples of specifically prohibited conduct include the following:

- A. Physical assaults of a sexual nature, such as rape, sexual battery, molestation or attempts to commit these assaults, and intentional physical conduct that is sexual in nature, such as touching, pinching, patting, grabbing, brushing against another employee's body or poking another employee's body.
- B. Unwelcome sexual advances, propositions or other sexual comments, such as sexually oriented gestures, noises, remarks, jokes or comments about a person's sexuality or sexual experience.
- C. Preferential treatment or promises of preferential treatment to an employee for submitting to sexual conduct, including soliciting or attempting to solicit any employee to engage in sexual activity for compensation or reward.
- D. Subjecting, or threats of subjecting, an employee to unwelcome sexual attention or conduct or intentionally making performance of the employee's job more difficult because of that employee's sex.
- E. Sexual or discriminatory displays or publications anywhere in our workplace by our employees.
- F. Retaliation for sexual harassment complaints.

6.30 RESPONDING TO VIOLATIONS OF THIS POLICY

If an employee believes that they have been subject to sexual harassment or any unwelcome sexual attention, they may address the situation directly and immediately to the harasser, if possible. If the inappropriate conduct does not cease, or if the employee is unable to or uncomfortable with addressing the alleged harasser directly, they should report the incident to their own supervisor or manager. If the inappropriate conduct does not cease, or if the employee is unable to or uncomfortable with addressing the situation with the supervisor or manager, they should report the incident to the Finance and Administration Manager. If the Finance and Administration Manager is not available or the employee is uncomfortable addressing the situation with the Finance and Administration Director, the employee may report the incident to the Executive Director.

It is important to report any and all concerns of sexual harassment or inappropriate sexual conduct to the HR director or a supervisor/manager as soon as possible. Management must be made aware of the situation so that it can conduct an immediate and impartial investigation and take appropriate action to remediate or prevent the prohibited conduct from continuing.

6.40 DISCIPLINE

Employees who violate this policy are subject to appropriate discipline. If an investigation results in a finding that this policy has been violated, the mandatory minimum discipline is a written reprimand. The discipline for very serious or repeat

violations is termination of employment. Persons who violate this policy may also be subject to civil damages or criminal penalties.

6.50 DISCRETION

All inquiries, complaints and investigations are treated discreetly. Information is revealed strictly on a need-to-know basis. Information contained in a formal complaint is closely contained. All information pertaining to a sexual harassment complaint or investigation is maintained by the HR director in secure files. The HR director can answer any questions relating to the procedures for handling information related to sexual harassment complaints and investigations to complainants and respondents.

7 WORKPLACE ENVIRONMENT

7.20 ACCOMMODATIONS POLICY

7.30 WORKPLACE CONFLICT POLICY

7.40 OPEN OFFICE ENVIRONMENT

7.50 SCENTS AND FRAGRANCES IN THE WORKPLACE

7.60 SAFETY

7.61 HAZARDOUS AND TOXIC MATERIALS

7.62 WORKPLACE INJURIES

7.63 CONTAGIOUS ILLNESS

7.70 PARKING

7.80 TOBACCO, SMOKING AND SMOKING-ALTERNATIVE PRODUCTS

7.90 DRUG AND ALCOHOL POLICY

7.100 WEAPONS IN THE WORKPLACE POLICY

7.110 SOCIAL EVENTS WITHIN THE WORKPLACE POLICY

7.120 CONSENSUAL ROMANTIC RELATIONSHIPS

7.130 WORKPLACE VIOLENCE

7.140 PERSONAL APPEARANCE/DRESS CODE

7.160 NON-EMPLOYEE SOLICITATION AND DISTRIBUTION POLICY

7.170 CTAC PROPERTY AND VEHICLES

7.180 BULLETIN BOARDS

7.190 VISITORS

7.20 ACCOMMODATIONS POLICY

It is the policy of CTAC to afford equal opportunity to all employees, regardless of physical or mental disability. However, all employees with such disabilities are expected to perform the essential functions of their positions as both defined in their respective job descriptions or as performed on a regular basis as part of their normal responsibilities. All employees with disabilities are eligible for accommodations per the Americans with Disabilities Act. Such requests must be made to either the employee's direct supervisor or made to the human resource officer of the CTAC. While the CTAC cannot make all requested accommodations, it will work with the employees to define reasonable terms and supply such terms to the employee. If the employee cannot perform the essential functions with the requested accommodation, the employee may be separated from the CTAC.

- A. Breastfeeding Accommodation. We recognize the needs of new mothers and provide a reasonable unpaid break time for employees needing to express breast milk for their nursing child for up to one year from the child's date of birth. We provide private office space that will shield the employee from view and will be wholly free from coworker or public intrusion. If such need arises, simply contact your supervisor and necessary breaks and corresponding office space will be provided.

B. Religious Expression Accommodation. CTAC is dedicated to treating the religious diversity of all our employees equally and with respect. At no time will CTAC question the validity of a person's belief.

1. Religious Communication and Behavior. It is not a violation of this Policy for employees to discuss religion, or to read or view religious materials, at work during non-working time. However, employees who do so should be sensitive to and respectful of the different beliefs (or lack of belief) of others. When another employee objects to religious advances, such behaviors and efforts must immediately cease. Moreover, religious practices that interfere with job performance, excessive "preaching" that is unwelcome to others, or adverse treatment of others because of their beliefs, different beliefs, or lack of belief, may be considered "harassment" within the meaning of this and other existing policies.
2. Religious Accommodations. Employees may request an accommodation when their religious beliefs cause a deviation from CTAC's dress code, schedule, basic job duties, leave or other aspects of employment. As such, CTAC welcomes any requests for accommodations because of recognized beliefs that do not create an undue hardship on CTAC's ability to properly fulfill its mission. CTAC will consider the request but reserves the right to offer its own accommodation to the extent permitted by law. Some, but not all, of the factors that CTAC will consider are cost, the effect that an accommodation will have on current established policies and the burden on operations, including other employees, when determining a reasonable accommodation. The procedure for reasonable accommodation requests includes:
 - a. Employee advises their supervisor of the need for accommodation.
 - b. The accommodation request will be discussed with the employee and the employee's supervisor.
 - c. If a reasonable appropriate accommodation is readily available, the request will be approved and the accommodation implemented.
 - d. If an accommodation is not readily ascertainable, the matter will be pursued further with assistance from appropriate external resources.
3. Personalization Of Work Areas And Holiday Decorations.
 - a. Employees are generally permitted to engage in private expression, including displays of religious ornamentation, in

personal work areas that are not regularly open to the public. However, CTAC reserves the right to restrict workplace décor for legitimate reasons relating to safety, hygiene, or environmental conditions.

- b. In a public workspace, that is, a space to which the public has physical or visual access, only secular decorations, including secular holiday decorations, may be displayed. Religious symbols or decorations with religious content may not be displayed in public work spaces.

7.30 WORKPLACE CONFLICT POLICY

CTAC recognizes that employees may disagree on occasion about how to accomplish assignments, job tasks, or the services provided to our customers. We may also disagree about personal philosophies and values. Such disagreements are to be expected, particularly with a diverse workforce. However, it is absolutely necessary that, regardless of what we disagree about, that we treat each other and our customers with respect and courtesy at all times. This is expected of each and every employee at all times and failure to meet this requirement will result in discipline. Where possible, it is important for employees to work together to resolve such disagreements.

CTAC also understands that some disagreements may require assistance for the employees to reach an appropriate resolution. If a dispute cannot be cooperatively resolved between employees, management requests that the employees bring the matter to the attention of the employees' immediate supervisor. The supervisor will receive information from the employees involved and is provided with the authority to attempt to resolve the matter, if possible. If not, the supervisor will notify the Executive Director as to what other actions should be taken.

Please understand that CTAC cannot help to resolve disputes that are not reported. Please also be aware that any dispute resolution process does not allow a subordinate employee to ignore the appropriate direction of their supervisor.

7.40 OPEN OFFICE ENVIRONMENT

Common courtesy and respect will go a long way in ensuring a productive environment in our workspace. To assist toward the goal of helping each of you be as productive as possible, we are providing the following guidelines:

A. Minimize hallway conversations

While it can be convenient and productive to have a quick work conversation in the hallway with a coworker, these conversations can be very distracting to other employees working in close proximity. Be mindful of the potential for disruption

and step to a convenient conference room or to a general corridor away from other workers to have the conversation.

B. Limit noises

Keep the sounds coming from your workspace to a minimum. This means using earbuds when listening to music, picking up the phone after one or two rings, tuning the ring volume on your phone to a low setting, and avoiding screensaver sound effects. When away from your workspace, set your office phone to take voice messages and if you leave your cellphone behind when you leave your workspace, set it to vibrate. Be aware of your personal voice volume level. Speak only loud enough to be heard by the intended audience when talking on the telephone or to your coworkers. Those around you may be able to hear you, even when you are not thinking about it.

C. No confidential meetings

Avoid discussing personal and/or confidential matters at your workspace. Whether you're on the telephone or having a discussion with a coworker, your conversation may easily be overheard by others. Move to a conference room or step outside to discuss personal or confidential matters.

D. Be considerate of sensitivities to aromas

The sense of smell is one of the most powerful senses we possess. What smells good to one person, may not be enjoyed by another. Be careful of the smells you bring to the office. Be judicious in the use of cologne/perfume. Do not bring strong scented oils or room deodorizers to the workplace. Avoid eating strong-smelling food in your workspace as well.

E. Decorate with taste

You need to use good judgment when decorating your workspace. Avoid things that are controversial. This includes things that are political, spiritual, sensual, or cultural. Your office décor should be in good taste without offending others.

F. Respect other's privacy

Be respectful of your coworkers. Avoid peeking into another workspace or listening in on other's conversations. Resist the temptation to chime in on other's conversations or join them uninvited. Give others the same respect that you want.

7.50 SCENTS AND FRAGRANCES IN THE WORKPLACE

Exposure to fragranced products can make it difficult for some employees to function effectively at work. Fragrance sensitivity is either an irritation or an allergic reaction to some chemical or combination of chemicals in a product. Although perfumes and

colognes are generally what come to mind, fragrance is commonly added to a variety of daily use items like toiletries, cosmetics, air fresheners, laundry soaps and softeners, and cleaning products. People with fragrance sensitivity often experience symptoms such as breathing difficulties, wheezing, a tight feeling in the chest, or worsening of asthma symptoms; headaches; nausea; hives and other skin irritations; and limitations in memory and concentration.

We request that all employees be aware of how their use of fragrances may impact their coworkers and refrain from wearing colognes, perfumes, etc. to the workplace and refrain from using scented products in the workplace.

If you experience an allergic reaction or have a sensitivity to a workplace scent or fragrance, please notify your supervisor so that the issue may be addressed. Collaboration between all parties should remedy the situation. Accommodation requests will be considered the same as any other disability accommodation.

7.60 SAFETY

It is our policy to promote safety on the job. The health and well-being of our employees is foremost among our concerns. For this reason, you are urged to follow common sense safety practices and correct or report any unsafe condition, defective tool, or equipment to your supervisor. Each employee is expected to assist CTAC in maintaining safe working conditions. Safety is a state of mind and requires constant vigilance and common sense. Safety is everyone's responsibility. Remember: SAFETY FIRST.

All accidents -- including those which do not involve serious injury and those involving customers -- must be reported immediately to your supervisor.

7.61 HAZARDOUS AND TOXIC MATERIALS

If your job requires that you use hazardous or toxic materials, you are expected to comply with all federal, state and local laws and regulations concerning their safe handling and disposal. Please be sure to familiarize yourself with proper handling and safety procedures. If you have any questions, please discuss them with your supervisor.

7.62 WORKPLACE INJURIES

CTAC strives to provide a workplace that is free from any known health or injury hazards. Employees can assist us by bringing forward any health or safety concerns. Employees may speak with their supervisor about any issues related to safety without fear of reprisal or retaliation. Employees may also receive periodic training on workplace safety and responsible handling of hazardous substances.

If an employee sustains a job-related injury or illness, it must immediately be reported to the supervisor or another member of management. This reporting requirement applies to all injuries, no matter how small or insignificant it may appear initially. The CTAC wants

to ensure that any injured employee receives prompt and appropriate medical attention. Additionally, CTAC complies with all federal and state regulatory standards regarding workplace injuries and illnesses. As such, we must make a timely record of any workplace injuries or illnesses. We also are responsible for workers' compensation insurance for employees which provides for medical coverage, disability coverage and loss of work time compensation due to a work-related injury.

Employees may report work-related injuries and illnesses without any concerns of adverse employment action or retaliation by CTAC.

7.63 CONTAGIOUS ILLNESS

CTAC owes an obligation to the entire workforce to prohibit employees who have an infectious condition, illness, or injury from working until such time that an infected employee is able to produce written verification from a licensed physician that the condition is no longer contagious. CTAC shall work with immense diligence to protect the private health information of the infected employee; however, all employees must also recognize the need to alert other employees of infectious conditions that may have impacted others, particularly those with sensitive medical conditions including pregnancy, immune deficiency conditions, etc. Records of employee medical examinations shall be kept in a separate and confidential file.

Employees with contagious conditions that may pose health risks to others agree that they will report such conditions to the Finance and Administration Manager for appropriate guidance and management immediately upon learning of the condition. An employee who reports for duty with a suspected infectious condition shall be sent home and referred to their personal physician for further evaluation. Following the medical evaluation, the employee may return to work with a physician's statement that indicates the employee is free of an infectious condition.

When reporting for duty after recovering from an infectious condition, the employee shall present the physician's statement to Finance and Administration that states the employee is free of the infectious condition before being allowed to return to work. No employee shall return to work who has a temperature elevation, draining skin lesions, a communicable rash, or a communicable disease. Such employees may pose a direct threat to the health and safety of the other employees and our customers.

7.70 PARKING

So that we have sufficient parking for our customers, we require all of our employees to park their vehicles in the area designated for employee parking. If you have any questions as to where you should park your vehicle, please ask your supervisor.

7.80 TOBACCO, SMOKING AND SMOKING-ALTERNATIVE PRODUCTS

Our policy is to provide smoke-free environments for our employees, members and the

general public. The use of tobacco, smoking and smoking-alternative products (such as e-cigarettes and vapor inhaling products) are not permitted anywhere within the buildings occupied by CTAC, i.e. in the offices, walkways leading to or from the building, break room, restrooms, hallways, etc. Tobacco, smoking, and smoking-alternative products are also prohibited in any CTAC-owned or leased vehicles.

Smokers and users of tobacco products must dispose of the remains in the proper containers; however, no tobacco remains may be discarded within the building.

Employees may use tobacco products, smoke or use smoking-alternative products on scheduled breaks or during meal-times, as long as they do so outside, and away from the worksite or office.

Employees who take excessive smoke breaks may be disciplined.

7.90 DRUG AND ALCOHOL POLICY

We will not tolerate alcohol abuse or the use of other intoxicants and mind-altering substances, including illegal drugs. By virtue of their employment with CTAC, our employees may be required to submit to drug screens, blood alcohol tests, breathalyzer tests and medical examinations under the following circumstances:

- A. when an employee is hired;
- B. when an employee is suspected of working or reporting to work with intoxicants or mind-altering substances in their system;
- C. when an employee suffers an on-the-job injury or is involved in an accident while at work;
- D. when an employee returns to work after a leave of absence of two weeks or more; or
- E. on a periodic or random basis.

The presence of 0.04% alcohol or the presence of any other intoxicants or mind-altering substances in the body is a violation of this policy. Refusal of an employee to undergo testing or to cooperate fully with any of these tests is also a violation of our policy.

Our employees are also prohibited from possessing, using, selling or purchasing any alcoholic beverages or other mind-altering substances on CTAC property or in CTAC vehicles. Off-premises possession, use, sale or purchase of mind-altering substances and off-premise alcohol abuse may reflect unfavorably on the CTAC's reputation and is also prohibited.

This policy does not prohibit the proper use of medication under the direction of a physician. However, the misuse or abuse of such drugs is prohibited. Employees who

are taking prescription or nonprescription drugs which could affect their ability to perform their job in a safe and efficient manner must notify their immediate supervisor of this fact when they report to work.

In order to protect the safety and property of all employees, CTAC reserves the right to inspect employees' lockers, toolboxes, desks and cabinets as well as motor vehicles and any other personal belongings brought onto CTAC property. Failure to cooperate with such inspections is a violation of this policy.

Violation of any aspect of the CTAC's Drug and Alcohol policy will result in discipline up to and including immediate termination.

7.100 WEAPONS IN THE WORKPLACE POLICY

It is our policy to strictly prohibit any employee, vendor, or customer from carrying any sort of weapon into our offices. Employees are permitted to bring weapons in their vehicles into our parking lots if they remain locked within such vehicle and the employee maintains a current and legal permit to carry the weapon. Such weapons may not be used for any inappropriate or illegal use. Any violation of this policy will result in immediate termination of such employee.

7.110 SOCIAL EVENTS WITHIN THE WORKPLACE POLICY

Our culture seeks to be inclusive and permit all employees to participate in any and all social gatherings that occur within the workplace. Events such as birthday parties, retirement celebrations, and other like events represent opportunities to fellowship and further develop the culture of CTAC. As such, no employee is allowed to initiate or organize a social gathering or function without inviting all employees to attend. Simultaneously, no employee should ever feel pressured to participate in such an activity and simply needs to express their lack of interest in such participation to those organizing such an event.

7.120 CONSENSUAL ROMANTIC RELATIONSHIPS

CTAC prohibits romantic or sexual relationships between a management or other supervisory employee and their staff (an employee who reports directly or indirectly to that person) because such relationships tend to create compromising conflicts of interest or the appearance of such conflicts. In addition, such a relationship may give rise to the perception by others that there is favoritism or bias in employment decisions affecting the staff employee. Moreover, given the uneven balance of power within such relationships, consent by the staff member is suspect and may be viewed by others or, at a later date, by the staff member themselves as having been given as the result of coercion or intimidation. The atmosphere created by such appearances of bias, favoritism, intimidation, coercion, or exploitation undermines the spirit of trust and mutual respect that is essential to a healthy work environment.

Additionally, CTAC discourages romantic or sexual relationships between all employees. Such relationships can complicate working associations with other employees, limit an employee's eligibility for transfer or promotion, and personal conflicts from outside the work environment can be carried over into day-to-day working relationships. Employees in a close personal relationship should refrain from public workplace displays of affection or excessive personal conversation.

If any supervisory or management employee enters into a consensual relationship that is romantic or sexual in nature with a member of their staff (an employee who reports directly or indirectly to them), or if one of the parties is in a supervisory capacity in the same department in which the other party works, the parties must notify the manager. Although the parties may feel that what they do during non-working hours is their business and not the business of the office, because of potential issues regarding "quid pro quo" harassment, this is a mandatory requirement. This requirement does not apply to employees who do not work in the same department or parties who do not supervise or otherwise have management responsibilities over others.

Once the relationship is made known to CTAC, CTAC will review the situation in light of all the facts (reporting relationship between the parties, effect on coworkers, job titles of the parties, etc.) and will determine whether one or both parties need to be moved to another job or department. That decision will be based on which move will be least disruptive to CTAC as a whole.

If it is determined that one or both parties must be moved, but no other jobs are available for either party, one or both parties may be terminated.

This policy applies to all employees without regard to the gender of the individuals involved.

7.130 WORKPLACE VIOLENCE

CTAC maintains a zero-tolerance standard of violence in the workplace. The purpose of this policy is to provide all employees with guidelines that will maintain a workplace culture that is free of violence. Threats, either implied or direct, of any kind by an employee, client, vendor, or any other person are prohibited at CTAC. Such conduct will not be tolerated and will result in prompt and remedial action. An employee who exhibits violent behavior may be subject to criminal prosecution and shall be subject to disciplinary action up to and including dismissal. Violent threats or actions by a non-employee may result in criminal prosecution. CTAC urges all employees to come forward to their supervisor in the event that they become aware of any type of potential or actual threat or in any situation in which they observe or learn of a conflict within the workplace. An immediate investigation will occur when any such report is made. Retaliation against a person who makes a complaint regarding violent behavior or threats of violence made to such person is also prohibited.

Workplace Violence: Behavior in which an employee, former employee or visitor to a workplace inflicts or threatens to inflict damage to property, serious harm, injury or death to others at the workplace.

Threat: The implication or expression of intent to inflict physical harm or actions that a reasonable person would interpret as a threat to physical safety or property.

Intimidation: Making others afraid or fearful through threatening behavior.

Zero-tolerance: A standard that establishes that any behavior, implied or actual, that violates the policy will not be tolerated.

Court Order: An order by a Court that specifies and/or restricts the behavior of an individual. Court Orders may be issued in matters involving domestic violence, stalking or harassment, among other types of protective orders, including Temporary Restraining Orders.

- A. **PROHIBITED BEHAVIOR:** Violence in the workplace may include, but is not limited to the following list of prohibited behaviors directed at or by a coworker, supervisor or member of the public:
1. Direct threats or physical intimidation
 2. Implications or suggestions of violence
 3. Stalking
 4. Assault of any form
 5. Physical restraint, confinement
 6. Dangerous or threatening horseplay
 7. Loud, disruptive or angry behavior or language that is clearly not part of the typical work environment
 8. Blatant or intentional disregard for the safety or well-being of others
 9. Commission of a violent felony or misdemeanor on CTAC property
 10. Any other act that a reasonable person would perceive as constituting a threat of violence
 11. Domestic Violence, while often originating in the home, can significantly impact workplace safety and the productivity of victims as well as coworkers. For the purposes of this document, “domestic violence” is defined as abuse committed against an adult or fully emancipated minor. Abuse is the intentional reckless attempt to cause bodily injury, sexual assault, threatening behavior, harassment, stalking, or making annoying phone calls to a person who is in any of the following relationships:

- a. Spouse or former spouse
- b. Domestic partner or former domestic partner
- c. Cohabitant or former cohabitant and/or other household members
- d. A person with whom the victim is having, or has had, a dating or engagement relationship
- e. A person with whom the victim has a child
- f. The Organization recognizes that domestic violence may occur in relationships regardless of the marital status, age, race, or sexual orientation of the parties.

B. REPORTING ACTS OR THREATS OF VIOLENCE: An employee who is the victim of violence, or believes they have been threatened with violence, or witnesses an act or threat of violence towards anyone else shall take the following steps:

- 1. If an emergency exists and the situation is one of immediate danger, the employee shall contact the local police officials by dialing 9-1-1, and may take whatever emergency steps are available and appropriate to protect themselves from immediate harm, such as leaving the area.
- 2. If the situation is not one of immediate danger, the employee shall report the incident to the appropriate supervisor or manager as soon as possible and complete the Organization Workplace Violence Incident Report Form.

C. PREVENTING FUTURE VIOLENCE: Employees who have reason to believe they, or others, may be victimized by a violent act sometime in the future, at the workplace or as a direct result of their employment with the Organization, shall inform their supervisor by immediately completing a Workplace Violence Incident Report Form so appropriate action may be taken. The supervisor shall inform their Department Director or designee, the Executive Director, and the local law enforcement officials.

Employees who have signed and filed a restraining order, temporary or permanent, against an individual due to a potential act of violence, who would be in violation of the order by coming near them at work, shall immediately supply a copy of the signed order to their supervisor. The supervisor shall provide copies to the Department Director, the Director of Human Resources and the local police.

D. INCIDENT INVESTIGATION: Acts of violence or threats will be investigated immediately in order to protect employees from danger, unnecessary anxiety

concerning their welfare, and the loss of productivity. The employee's Department Director will cause to be initiated an investigation into potential violation of work rules/policies. Simultaneously, the Department Director will refer the matter to local police for their review of potential violation of civil and/or criminal law. Procedures for investigating incidents of workplace violence include:

1. Visiting the scene of an incident as soon as possible
2. Interviewing injured and threatened employees and witnesses
3. Examining the workplace for security risk factors associated with the incident, including any reports of inappropriate behavior by the perpetrator
4. Determining the cause of the incident
5. Taking mitigating action to prevent the incident from recurring
6. Recording the findings and mitigating actions taken.

In appropriate circumstances, CTAC will inform the reporting individual of the results of the investigation. To the extent possible, CTAC will maintain the confidentiality of the reporting employee and the investigation but may need to disclose results in appropriate circumstances; for example, in order to protect individual safety. CTAC will not tolerate retaliation against any employee who reports workplace violence.

E. MITIGATING MEASURES: Incidents which threaten the security of employees shall be mitigated as soon as possible following their discovery. Mitigating actions include:

1. Notification of law enforcement authorities when a potential criminal act has occurred
2. Provision of emergency medical care in the event of any violent act upon an employee
3. Post-event trauma counseling for those employees desiring such assistance
4. Assurance that incidents are handled in accordance with the Workplace Violence Prevention policy
5. Requesting CTAC's attorney file a restraining order as appropriate.

7.140 PERSONAL APPEARANCE/DRESS CODE

Employee appearance contributes to CTAC's culture and reputation. Employees are

expected to present themselves in a professional manner that results in a favorable impression by clients and customers. CTAC's department managers may exercise reasonable discretion to determine appropriateness in employee dress and appearance. Employees who do not meet a professional standard may be sent home to change. Reasonable accommodations will be made where required.

Traditional business attire is expected of all employees. Basic elements for appropriate and professional business attire include clothing that is in neat and clean condition. Appropriate workplace dress does not include clothing that is too tight or revealing; clothing with rips, tears or frays; or any extreme style or fashion in dress, footwear, accessories, fragrances or hair.

Although it is impossible and undesirable to establish an absolute dress and appearance code, CTAC will apply a reasonable and professional workplace standard to individuals on a case-by-case basis. Management may make exceptions for special occasions or in the case of inclement weather, at which time employees will be notified in advance. An employee who is unsure of what is appropriate should check with his or her manager or supervisor.

Business casual dress will be permitted on Fridays, however when meeting clients, business professional dress guidelines must be observed,

7.160 NON-EMPLOYEE SOLICITATION AND DISTRIBUTION POLICY

CTAC does not permit solicitation or distribution by non-employees at any time on CTAC's premises. Additionally, CTAC prohibits solicitation and distribution by any employee or non-employee during work time. This includes all types of distribution and solicitation such as requests for charitable giving, endorsement of political campaigns, the sale of goods for the benefit of children or partners, and all other similar behaviors. Employees violating such expectation may be disciplined or even terminated.

7.170 CTAC PROPERTY AND VEHICLES

Only authorized employees may use CTAC vehicles. If a CTAC vehicle incurs any damage while under the charge of a particular employee, that employee will be responsible for reporting the damage immediately and may be responsible for paying the deductible amount toward repair.

Any employee whose duties include the operation of CTAC vehicles who is cited for D.U.I. or D.W.I. or for any other serious moving violation will be considered to have an unacceptable driving record and their continued employment will be subject to review.

If an employee receives a traffic citation while operating a CTAC vehicle, the employee will be responsible for paying any fine or penalty.

7.180 BULLETIN BOARDS

We maintain bulletin boards at various locations throughout the organization as an important information source. These bulletin boards are to be used solely to post information approved by the CTAC regarding CTAC policies, governmental regulations, and other matters of concern to all employees which are related to the employees' employment by CTAC. Please develop a habit of checking the bulletin boards daily so that you will be familiar with the information posted there. No information may be placed on these bulletin boards without the approval of the Executive Director.

7.190 VISITORS

Visits by friends or relatives can be disturbing to our operations. Therefore, we strongly discourage such visits during work hours.

8 COMPENSATION AND BENEFITS

8.10 PAY PERIODS

8.20 TIMEKEEPING PROCEDURES

8.30 LOANS AND PAY ADVANCES

8.40 SAFE HARBOR COMPLIANCE

8.50 OVERTIME

8.60 HOLIDAYS

8.70 TRAINING AND EDUCATIONAL ASSISTANCE

8.80 BENEFITS

8.90 BENEFITS CONTINUATION DURING UNPAID LEAVE OF ABSENCE

8.100 FLORIDA RETIREMENT SYSTEM

8.10 PAY PERIODS

We distribute paychecks biweekly. A payroll calendar can be found here or on our website.. Any questions or concerns about your pay amount or deductions should be brought to the attention of your supervisor immediately.

8.20 TIMEKEEPING PROCEDURES

Unless otherwise notified, each employee is required by federal law and by CTAC to keep an accurate record of their hours worked each day. You will generally use the timekeeping system to record your beginning work time, the time you break for lunch, the time you return from lunch and the time you end the workday. Any other break from work for more than twenty minutes must also be accounted for by using the timekeeping system to record the beginning and ending times of the break. We expect you to accurately record all of the time that you work for CTAC.

You are expected to begin work immediately following “clocking in”. Additionally, if you perform any work when you are not “clocked in”, you must immediately report that time to your supervisor.

If you forget to record your “in” or “out”, notify your supervisor immediately so that the time can be accurately recorded in our system for payroll purposes. Any changes or corrections to your time record must be acknowledged, in writing, by you and your supervisor.

Under no circumstances may any employee clock in/out or otherwise record time for another employee.

It is the policy of CTAC that non-exempt employees will work only their assigned schedule unless they are provided with specific, prior approval for a schedule change or overtime. Reading, sending, or otherwise working on emails off work hours constitutes

work and is strictly prohibited without such prior approval. Employees are responsible for monitoring the number of hours they are working each day/week. There will be disciplinary action taken if an employee works unapproved overtime.

No employee may “volunteer” their time or otherwise work “off-the-clock” and no supervisor or manager has the authority to require, permit or ask any staff to work hours without reporting them.

Employees violating any provision of this policy are subject to discipline, up to and including termination.

8.30 LOANS AND PAY ADVANCES

During our years in business, we have learned that loans to employees or advances in pay do little in the long run to help an employee meet his or her financial obligations. At the same time, we may be put in a very difficult and unpleasant position if we were required to collect a past due loan. For these reasons, it is our policy not to make loans or pay advances to employees.

8.40 SAFE HARBOR COMPLIANCE

It is our policy to comply with the salary basis requirements of all existing wage laws. Therefore, we prohibit all organizational leadership from making any improper deductions from employees who are not eligible for overtime. If you believe that an improper deduction has been made to your salary, you should immediately report this information to your direct supervisor. Reports of improper deductions will be promptly investigated. If it is determined that an improper deduction has occurred, you will be promptly reimbursed for any improper deduction made.

8.50 OVERTIME

CTAC may periodically schedule mandatory overtime or weekend work in order to meet business or customer needs. We will attempt to give you as much advance notice as possible, and we expect that all employees who are scheduled to work overtime will be at work, unless excused by their supervisor.

8.60 HOLIDAYS

All full-time employees will receive the following days off with pay, any time they fall on a regular workday, or, if the day falls on a weekend, the day the holiday is observed. The CTAC will publish an observed holiday calendar on or before January 1 of every year:

- A. New Year's Day
- B. Martin Luther King Jr. Day
- C. Memorial Day

- D. Juneteenth
- E. Independence Day
- F. Labor Day
- G. Veterans Day
- H. Thanksgiving Day
(Thursday and Friday)
- I. Christmas Eve
- J. Christmas Day

In addition, each employee will be granted two floating holidays in order to accommodate holidays such as Kwanza, Chanukah, or other holidays not recognized on the calendar above.

8.70 TRAINING AND EDUCATIONAL ASSISTANCE

CTAC provides periodic training courses for qualified employees. In addition, full-time employees may be given the opportunity to attend training programs that will enable them to improve their skills and qualify for advancement. Educational assistance is provided at the discretion of the CTAC and may include tuition, books and supplies.

Advance approval by the Executive Director is required before any course is taken. Reimbursement is paid upon successful completion of an approved course.

8.80 BENEFITS

- A. Health, Dental, Vision, Employee Assistance Program (EAP) and Peerfit. The CTAC partners with the Alachua County Board of County Commissioners and participates in the BoCC's benefits plan. The plan includes Health, Dental, Vision, and Life Insurance, Flex Spending Accounts, an Employee Assistance Program, and Supplemental Retirement Options. The Employee Benefits Summary, including information on eligibility, can be found [here](#).
- B. Flexible Spending and Dependent Care Spending Account. (TBD)
- C. Life Insurance. (TBD)
- D. Supplemental Retirement. (TBD)

8.90 BENEFITS CONTINUATION DURING UNPAID LEAVE OF ABSENCE

There are specific requirements for continuation of benefits under FMLA and COBRA.

Please see those policies for details about benefit continuation under those programs.

During any other unpaid leave of absence, it is the expectation that you will pay the full cost of your benefits (organization and employee share). Coverage can only be continued if you arrange in advance to pay for your benefits.

To maintain any of your benefits (health, life, etc.), you are responsible for paying the entire premium amount by the first of every month for the month of coverage. If you fail to make the payments as prescribed, coverage will be cancelled. If coverage is cancelled, your benefits will end on the last day of the month for which a premium has been paid.

8.100 FLORIDA RETIREMENT SYSTEM

CTAC participates in the Florida Retirement System. New employees must choose between two different FRS plans, the FRS pension plan and the FRS investment plan. A new employee will receive a new hire kit from the Florida Retirement System with information on the two plan options and instructions on how to make an election. There is a mandatory 3% employee contribution. Employees enrolled in DROP or re-employed retirees who are not allowed to renew membership are not required to make the 3% contribution.

The FRS Pension Plan is a defined benefit plan, in which you are promised a benefit at retirement if you meet certain criteria. The amount of your future benefit is determined by a formula, based on your earnings, length of service, and membership class, and is adjusted by a 3% cost-of-living each July after retirement for service earned prior to July 1, 2011. Your benefit is pre-funded by contributions paid by you and your employer. The Florida Retirement System must ensure that sufficient funds are available when your benefits are due and bears the market risk and investment decisions.

More information on the Florida Retirement System can be found [here](#).

9 COMMUNICATIONS AND IT POLICY

9.10 EQUIPMENT AND PROPERTY ASSIGNED TO YOU

9.20 COMMUNICATION AND COMPUTER SYSTEMS SECURITY AND USAGE

9.30 BRING YOUR OWN DEVICE - POLICY AND RULES OF BEHAVIOR

9.40 COMPUTER PASSWORD

9.50 PERSONAL CELL PHONE OR SIMILAR DEVICE USED FOR BUSINESS

9.60 E-MAIL CURFEW

9.70 SOCIAL MEDIA POLICY

9.80 OUR LOGO, TRADEMARK AND BRAND

9.10 EQUIPMENT AND PROPERTY ASSIGNED TO YOU

We have made a tremendous investment in our facilities and equipment in order to better serve our clients and to make your job easier. Equipment such as laptop, cell phone, PowerPoint projectors, MIFI, etc., may be assigned to you to facilitate our service to our clients.

Except for the property/equipment specifically assigned to you for such purposes, no other property or equipment may be removed from the premises without the express permission of the Executive Director.

Your computer may be the most valuable item assigned to you. As well as being expensive to replace physically, your computer may contain valuable and sensitive data.

You may not use the equipment assigned to you to conduct work for yourself or another entity.

Equipment assigned to you is subject to monitoring. You should have no expectation of privacy with respect to the use of such equipment. Additionally, you may be asked to surrender the equipment with no notice for a variety of reasons including routine maintenance.

Requirements for safeguarding the equipment assigned to you include protecting it from theft. Always remove equipment from a vehicle when the vehicle is parked in a public location such as a restaurant or hotel. Never leave equipment in a vehicle overnight.

Do not remove any inventory or property marking tags. Do not remove or disable any protective software.

Additional safeguards include:

- A. Use strong passwords to protect the information stored on your computer.

- B. Use an uninterruptible power supply, when possible, so that blackouts, brown-outs and electricity spikes don't harm your equipment.
- C. Do not place liquids, magnets or hot items near your equipment.

If equipment assigned to you is in need of repair, report it to your supervisor immediately. You are responsible for the safekeeping of any CTAC-owned equipment or property that is in your possession. Careless disregard for proper care and safekeeping could subject you to disciplinary action.

9.20 COMMUNICATION AND COMPUTER SYSTEMS SECURITY AND USAGE

A. Policy Overview

This policy contains guidelines for the use, access, and disclosure of communications (including, among other things, telephone, mail, e mail, voice mail, desk and laptop computers, pagers, mobile phones, faxes or facsimiles, Internet, and intranet) sent or received by employees using any CTAC provided Communication or Computer Systems ("Systems").

B. Confidentiality and Acceptable Systems Usage

The CTAC's Systems are intended for CTAC business only. All information transmitted or stored in CTAC Systems (e.g., client lists, documents relating to policies and procedures) is the sole and exclusive property of the CTAC and should be treated as confidential. Such information may not be disclosed to any person outside of the CTAC nor may any such information be removed from our premises without the express permission of the Finance and Administration Manager or Executive Director. Employees are strictly prohibited from accessing, reading and copying data or information stored in the Systems, and from accessing, reading and copying communications not directed to them without prior authorization.

ALL SYSTEMS MESSAGES ARE CTAC RECORDS. THE CONTENTS OF OUR SYSTEMS MAY BE DISCLOSED TO THE CHILDREN'S TRUST OF ALACHUA COUNTY WITHOUT YOUR PERMISSION. THEREFORE, YOU SHOULD NOT ASSUME THAT MESSAGES AND COMMUNICATIONS ARE CONFIDENTIAL.

C. Management's Right to Access Information

Our Computer, Telephone, and Communication hardware and software systems have been installed and are used to facilitate business communications. Although each employee has an individual password to access these Systems,

they belong to the CTAC and the contents of all communications are accessible by management for any business purpose. CTAC reserves the right to monitor, and will periodically monitor, its Systems in order to ensure compliance with this Policy. Employees are strictly prohibited from placing personal passwords on any CTAC System for the purpose of preventing such monitoring.

EMPLOYEES SHOULD NOT CONSIDER ANY MATERIALS TRANSMITTED OR STORED IN CTAC SYSTEMS TO BE PRIVATE.

The CTAC reserves the right to limit or prohibit employee use of electronic communications when necessary to ensure organizational production or to discipline employees for performance-related reasons.

D. Personal Use of the CTAC's Communication and Computer Systems

1. General Usage

Because personal communications can be accessed without prior notice, employees should not use CTAC's Systems to transmit any messages, or to access any information, which you would not want a third party to see. Although incidental and occasional personal use of our Systems is permitted, any such personal use will be treated the same as all other communications under this Policy. However, employees are at all times strictly prohibited from accessing or downloading information from the Internet for personal use.

2. Telephone Usage

The Telephone Systems (including voicemail) at CTAC are the property of CTAC and are provided for business purposes. The CTAC may periodically monitor the usage of the telephone systems to ensure compliance with this policy. THEREFORE, EMPLOYEES SHOULD NOT CONSIDER THEIR CONVERSATIONS ON THE CTAC'S TELEPHONE SYSTEMS TO BE PRIVATE.

3. Personal Mail

All mail which is delivered to the CTAC is presumed to be related to CTAC business. Mail sent to you at CTAC will be opened by the office and routed to your department. If you do not wish to have your correspondence handled in this manner, please have it delivered to your home.

E. Forbidden Use and Content of Communications

You may not use our Systems in any way that may be seen as insulting, disruptive, offensive, or harmful to morale. Examples of prohibited, non-business purposes include, but are not limited to, use of the CTAC's Systems:

1. to convey insensitive, improper, derogatory, insulting, threatening, or harassing language or remarks, sexually explicit messages, cartoons, jokes, or other potentially offensive material;
2. to send propositions, love letters, or any other message that could be construed to be harassment or disparagement of others in violation of our policy against harassment;
3. to write personal letters, resumes, or other documents unrelated to CTAC business;
4. to run computer games or other personal software, or copy such software;
5. as a forum for gossip or personal communications.

CTAC may monitor employee use of computers and email for any and all legitimate management purposes. Such purposes include the assurance of employee production, the prevention of illegal harassment and other unethical behaviors, and all other reasons necessary to best ensure that the mission of the CTAC is met. Employees should not expect any privacy when using CTAC computers or email.

F. Password and Encryption Key Security and Integrity

All Systems passwords and encryption keys must be available to the CTAC at all times. Additionally, you may not use passwords that are unknown to your manager, nor may you install encryption programs without first turning over encryption keys to your manager. Further, employees are prohibited from the unauthorized use of passwords and encryption keys belonging to other employees in order to gain access to other employees' messages.

G. Software, Personal Disks, and Networking

Computer software, whether purchased, developed, or modified by the CTAC, may not be downloaded, copied, reproduced, altered or appropriated by employees without prior CTAC authorization. Any such computer software is the property of the CTAC and may not be copied or appropriated by employees for personal use during employment with CTAC or upon separation. Employees should be aware that the illegal duplication of computer software may result in

the filing of criminal copyright charges by the owners of the copyrights; copyright infringement is punishable by fines and/or imprisonment.

The CTAC does not condone the use of “bootleg” or “pirate” software on its computer system. The use of such software is grounds for discipline, up to and including immediate termination. Any employee who becomes aware of the presence of any “bootleg” or “pirate” software on the CTAC’s computer system should notify management immediately.

The use of personal disks or software in the CTAC’s computer system without prior authorization is strictly prohibited. Employees are further prohibited from accessing CTAC’s Systems from remote locations and from connecting CTAC Systems to outside systems without prior authorization.

H. Penalties for Violation of the CTAC’s Communication and Computer Systems Security and Usage Policy

VIOLATIONS OF ANY ASPECT OF THE CTAC’S COMMUNICATION AND COMPUTER SYSTEMS SECURITY AND USAGE POLICY MAY RESULT IN DISCIPLINE, UP TO AND INCLUDING IMMEDIATE DISCHARGE. CTAC will also seek civil damages against any employee who appropriates or copies the CTAC’s property as described in this Policy.

9.30 BRING YOUR OWN DEVICE - POLICY AND RULES OF BEHAVIOR

This document provides policies, standards, and rules of behavior for the use of personally-owned smart phones and/or tablets by employees to access our network resources. Access to and continued use of network services is granted on condition that each user reads, signs, respects, and follows the policies concerning the use of these devices and services.

Some employees may be authorized to use their own personal device for business purposes. These employees should work with the IT department to configure their personal device for business use. Communications sent via a personal device also may subject to monitoring if sent through the CTAC's networks and the personal device must be provided for inspection and review upon request.

CTAC will respect the privacy of your personal device and will only request access to the device by technicians to implement security controls, or to respond to legitimate discovery requests arising out of administrative, civil, or criminal proceedings (applicable only if user downloads CTAC email/attachments/documents to their personal device). This differs from policy for CTAC-provided equipment/services, where employees do not have the CTAC right, nor should they have the expectation, of privacy while using CTAC equipment or services. While access to the personal device itself is restricted, CTAC

policy and rules of behavior regarding the use/access of CTAC e-mail and other CTAC system/service remains in effect. If there are questions related to compliance with the security requirements, the user may opt to drop out of the BYOD program versus providing the device to technicians for compliance verification.

All conversations, text messages and e-mails must be professional. When sending a text message or using a personal device for business purposes, whether it is an CTAC-provided or personal device, employees must comply with applicable CTAC guidelines, including policies on sexual harassment, discrimination, conduct, confidentiality, equipment use and operation of vehicles.

Document Transfer involves connecting the personal device to the user's work PC via USB connections for file-sharing (document transfer) or backup purposes. It also includes backing up data/documents to external sources, such as cloud storage services.

Overall Requirements for all BYODs Accessing CTAC Network Services:

- A. User will not download or transfer sensitive business data to their personal devices. Sensitive business data is defined as documents or data whose loss, misuse, or unauthorized access can adversely affect the privacy or welfare of an individual (personally identifiable information), the outcome of a charge/complaint/case/project, proprietary information, or CTAC's financial operations. This excludes CTAC e-mail that is protected through the various security controls.
- B. User will password protect the device.
- C. User agrees to maintain the original device operating system and keep the device current with security patches and updates, as released by the manufacturer.
- D. User agrees that the device will not be shared with other individuals or family members, due to the business use of the device (potential access to CTAC e-mail, etc.).
- E. User agrees to delete any sensitive business files that may be inadvertently downloaded and stored on the device through the process of viewing e-mail attachments.
- F. If the device is lost or stolen, the user will notify the IT Help Desk within one hour, or as soon as practical after you notice the device is missing. The Help Desk will lock the device, e-mail on the device will be deleted, and notify-link services will be deactivated.
- G. Users must comply with all CTAC password policies, including use of strong passwords, password expiration, and password history.

- H. User will maintain anti-virus protection on the device.
- I. User will not download/transfer business data that is considered sensitive or confidential to the personal device, including any documents that contain personally identifiable information.
- J. User will not download/transfer sensitive business data/documents to any non-CTAC approved device.

If an employee who uses a personal device for business resigns or is discharged, the employee will be required to submit the device to the IT department for resetting on or before their last day of work. At that time, the IT department will reset and remove all information from the device, including but not limited to, CTAC information and personal data (such as contacts, e-mails and photographs). The IT department will make efforts to provide employees with the personal data in another form (e.g., on a disk) to the extent practicable. However, the employee may lose some or all personal data saved on the device.

Employees may not use their personal device for business unless they agree to submit the device to the IT department on or before their last day of work for resetting and removal of CTAC information. This is the only way currently possible to ensure that all CTAC information is removed from the device at the time of termination. The removal of CTAC information is crucial to ensure compliance with the CTAC's confidentiality and proprietary information policies and objectives.

9.40 COMPUTER PASSWORD

- A. Password Policies - This policy governs the creation, maintenance and security of CTAC computer systems and network passwords and passphrases. Passwords are an important aspect of computer security. They are the front line of protection for user accounts. A poorly chosen password may result in the compromise of CTAC's corporate network. As such, all employees are responsible for taking the appropriate steps to select and secure their passwords:
 1. All passwords (e.g., e-mail, Web, desktop computer) must be changed at least every twelve months.
 2. Passwords must not be inserted in e-mails or other forms of electronic communication.
 3. All passwords must conform to the guidelines described below.
 4. Passwords should never be written down or stored online or anywhere within their office or workspace. Similarly, passwords should not be stored in a file on any computer system, including digital assistants, smartphones or similar devices without encryption.
 5. Employees should not use the "remember password" feature found on

many computer and website applications.

- B. Guidelines for Password Construction - Passwords are used for various purposes at CTAC. Some of the more common uses include user-level accounts, Web accounts, e-mail accounts, screen saver protection, voicemail and local router logins. All employees should be aware of how to select strong passwords:
1. Contains both upper- and lower-case characters.
 2. Has digits and punctuation characters as well as letters.
 3. Is at least 12 alphanumeric characters long and is a passphrase (e.g., "1LoveiT123!!").
 4. Is not a word in any language, slang, dialect or jargon.
 5. Is not based on personal information, names of family members, etc.
- C. Employees should try to create passwords that can be easily remembered. One way to do this is to create a password based on a song title, affirmation or other phrase. For example, the phrase might be: "Star Spangled Banner", and the password could be: "**Sg1dBnR".
- D. Employees should not use the same password for CTAC accounts as for other non-CTAC assistants or supervisors—even when on vacation or otherwise out of the office. If someone demands a password, refer them to the Finance and Administration Manager.
- E. If an account or password is suspected to have been compromised, report the incident to the Technology Department and immediately change all passwords.
- F. Any employee found to have violated this policy will be subject to disciplinary action, up to and including termination of employment.

9.50 PERSONAL CELL PHONE OR SIMILAR DEVICE USED FOR BUSINESS

CTAC supplies employees with cell phones or other personal data devices, such as Smart Phones or Tablets for business purposes. Research indicates that phone calling, texting, or emailing using a cell phone or a personal data device while driving is dangerous and may even approach the equivalent danger of driving while drunk. We recognize that other distractions occur while driving, however, curbing the use of cell phones, and personal data devices during driving, is one way to minimize the risk of accidents.

Therefore, CTAC prohibits employees from using CTAC-provided cell phones or personal data devices to text or email while driving either an CTAC-rented or personal vehicle. Cell phone usage while driving either a CTAC-rented, or personal vehicle is restricted to usage only when operated in a hands-free mode. Further, personal cell

phones or personal data devices are restricted in the same manner when driving a CTAC-rented vehicle or when using a personal vehicle for CTAC business.

This prohibition of cell phone or similar device use while driving includes receiving or placing calls, text messaging, surfing the Internet, receiving or responding to email, checking for phone messages, or any other purpose related to your employment, CTAC, our customers, our vendors, volunteer activities, meetings, or civic responsibilities performed for or attended in the name of CTAC or any other CTAC-related activities not named here while driving.

All employees are required to stop their vehicle in a safe location to use a cell phone or personal data device.

Employees who violate this policy will be subject to disciplinary actions, up to and including employment termination.

9.60 E-MAIL CURFEW

It is the policy of CTAC that non-exempt employees will work only their assigned schedule unless they are provided with specific, prior approval for a schedule change or overtime. Reading, sending, or otherwise working on emails off work hours constitutes work and is strictly prohibited without such prior approval. Employees violating this policy are subject to discipline, up to and including termination.

9.70 SOCIAL MEDIA POLICY

We recognize that employees will use social media and other online communication tools as a growing way to connect with others. As an initial point, the same principles and guidelines that apply to your activities as an employee in general, as found throughout the Handbook and your job description, apply to your activities online. This includes any form of electronic communication, such as online publishing and discussion, including blogs, wikis, file-sharing, user-generated video and audio, virtual worlds, and social networks whether or not associated or affiliated with our organization. CTAC trusts and expects employees to exercise personal responsibility whenever they participate in social media. This includes not violating the trust of those with whom they are engaging. We expect that employees utilizing social media will recognize and follow the guidelines included within this policy. You are solely responsible for what you post online. Any of your conduct that adversely affects members, customers, clients, suppliers, employees or our business interests will result in disciplinary action, up to and including termination.

Please abide by the following expectations:

- A. You may not comment for or speak on behalf of CTAC without prior written approval.

- B. You may not make negative or disparaging remarks about other employees.
- C. Always consider the power of your comments and contemplate the impact of your post on your reputation and that of CTAC before you publish it.
- D. Respect all confidential and proprietary information that you possess as a result of your relationship with CTAC. Secure written permission to publish or report on conversations that are meant to be private or internal to CTAC. Examples of confidential information include, but are not limited to, client/customer information, confidential academic information, proprietary data, development of systems, products, processes and/or technology, internal policies and memorandums, and all proposed and executed organizational strategies. Do not post internal reports, policies, procedures or other internal business-related communications.
- E. You may not use the CTAC's logo, trademark, or graphics on personal sites without prior written approval.
- F. When disagreeing with others opinions, be appropriate and professional in doing so when posting such disagreement on social media sites.
- G. When posting about your work at CTAC use your real name, identify that you work for CTAC and the position that you hold. Be aware of your association with CTAC in online social networks. If you identify yourself as an employee of CTAC, ensure your profile and related content is consistent with how you wish to present yourself with colleagues and clients.
- H. Anytime you publish content on an external website regarding anything to do with work you do, or any subjects associated with CTAC, use the following disclaimer: "The postings on this site are my own and don't necessarily represent CTAC's positions, strategies or opinions."
- I. Respect financial disclosure laws. It is illegal to communicate or give a "tip" on inside information to others so that they may buy or sell stocks or securities.
- J. Respect your audience. Don't use slurs, personal insults, obscenity, or engage in any conduct that would not be acceptable in our workplace. You should also show proper consideration for others' privacy and for topics that may be considered objectionable or inflammatory.
- K. Employees are prohibited from posting any type of photograph of any CTAC employee, client/customer, parent, family member, or volunteer on any and all social networking sites without express written approval.
- L. Do not create a link from your personal blog, website or other social posting to CTAC's website.
- M. CTAC respects its employees' interest and willingness to convey group complaints regarding existing working conditions. While it wholly respects employees' right to discuss such concerns utilizing social media, it encourages

any such concerns to be brought to CTAC's administration.

- N. Refrain from using social media while on work time or on equipment we provide, unless it is work related and authorized by your manager and consistent with our equipment policy.
- O. Do not use your organizational email address to register on social networks, blogs or other online tools utilized for personal use.
- P. Vulgar, obscene, threatening, intimidating, harassing, discriminatory, or unlawful behaviors on social media sites may result in an employee's immediate termination.

9.80 OUR LOGO, TRADEMARK AND BRAND

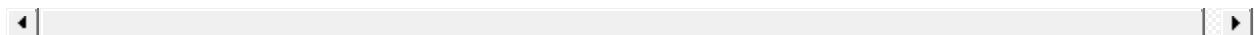
This policy governs the use of all CTAC's trademarks for any purpose and applies to all employees. Consistency in the use of our brand strengthens our value and our ability to be instantly recognized by our clients and other stakeholders. Our logo may only be used in strict accordance with this policy and the graphics requirements of the approved brand. Our log may not be altered or combined with any other mark or element. Our logo must appear prominently on all official communication and marketing materials such as brochures, letterhead and business cards.

Any use of our logo, trademark or brand in print and electronic materials including email and social media must conform to our brand requirements. Our logo may not be used on commercial merchandise except as expressly approved by the Executive Director.

Our logo may not be used in any way that states or implies endorsement of a commercial product or service, gives a false impression, is misleading, or could cause confusion regarding CTAC's relationship with any person or entity.

Neither our name nor our logo may be used in any manner that could adversely affect our image or standing in the community. Such proscribed uses include, but are not limited to, the use of our logo in connection with alcoholic beverages, cigarettes or other tobacco products, sexually oriented products or services, religious products, political parties or organizations, gaming or games of chance, and firearms.

We expect our employees to respect all copyright and other intellectual property laws—for the protection of CTAC as well as the employees. Proper respect for the laws governing copyright, fair use of copyrighted material owned by others, trademarks and other intellectual property, including our own logo, copyrights, trademarks and brands is critical to continued employment.



11 SEPARATION

11.1 NOTICE OF RESIGNATION

11.2 EXIT INTERVIEW

11.1 NOTICE OF RESIGNATION

In the event you choose to resign from your position, we ask that you give us at least two weeks' notice. We expect you to take care of all your outstanding business with CTAC and return all CTAC property prior to picking up your final paycheck.

11.2 EXIT INTERVIEW

Any employee leaving the CTAC is required to attend an exit interview conducted by a designee of the Executive Director. The purpose of the interview is to determine the reasons for leaving and to resolve any questions of compensation, insurance continuation, return of CTAC property, or other related matters.

13 ACKNOWLEDGMENT OF RECEIPT OF EMPLOYEE HANDBOOK

13.1 PROMISSORY NOTE POLICY

13.2 ACKNOWLEDGMENT

13.1 PROMISSORY NOTE POLICY

By executing the acknowledgment form attached to this Handbook, the employee accepts and understands that it may be utilized as an enforceable promissory note. If the employee fails to return any equipment, money, credit cards, or other property assigned to the employee during employment, the CTAC may first withhold the value of such amount from any final compensation due to the employee including paychecks, paid time off accrual, or any other such earned benefit. If such compensation does not exist or is insufficient to offset the value of the property due, the employee understands and agrees that the CTAC has legal entitlement to such property and will be responsible for such value and the cost of all attorney fees and costs expended in pursuing such property.

13.2 ACKNOWLEDGMENT

This will acknowledge that I have received my copy of the Children's Trust of Alachua County Employee Handbook and that I will familiarize myself with its contents.

I understand that this Handbook represents only current policies, regulations, and benefits, and that it does not create a contract of employment. The Children's Trust of Alachua County retains the right to change these policies and benefits as it deems advisable.

I UNDERSTAND THAT I HAVE THE RIGHT TO TERMINATE MY EMPLOYMENT AT ANY TIME, WITH OR WITHOUT CAUSE, AND THAT THE CHILDREN'S TRUST OF ALACHUA COUNTY HAS THE SAME RIGHT. I FURTHER UNDERSTAND THAT MY STATUS AS AN AT-WILL EMPLOYEE MAY NOT BE CHANGED EXCEPT IN WRITING SIGNED BY THE EXECUTIVE DIRECTOR OF THE CHILDREN'S TRUST OF ALACHUA COUNTY.

PRINT FULL NAME _____

SIGNED _____

DATE _____

[RETAIN IN EMPLOYEE PERSONNEL FILE]

File Attachments for Item:

11. Adoption of Resolution 2020-9 Employee Classification and Compensation Plan

**Item:**

Adoption of Resolution 2020-9 Employee Classification and Compensation Plan

Requested Action:

The Trust is asked to 1) accept the findings of the “Classification and Compensation Study Draft Report” as Final, 2) approve the Recommended Pay Plan on Page 6 of the report as the pay plan for the Children’s Trust, effective 10/1/2020, 3) approve the position classifications on Page 7 of the report, effective 10/1/2020; and 4) authorize the Executive Director to advertise and hire the positions in the report and as shown on the organizational chart included with this item, and ; 5) approve Resolution 2020-9, “Chapter 5 Human Resources” policies,

Background

The Executive Director, at the recommendation of the Director of Human Resources for the Board of County Commissioners, contracted with the Mercer Group to conduct a classification and compensation study. The intent was to help guide the Trust in developing policies to recruit and fairly compensate a high-quality workforce.

Because the Trust currently hires its employees under BoCC policy 4.2(1.e.) and contracts for Human Resource services with the BoCC, the Trust has no policies of its own in this area. This study and the accompanying policy resolution provides a framework for classifying and compensating employees.

Attachments

Resolution 2020-9
Classification and Compensation Study Draft Report
Organizational Chart

Programmatic Impact:

None

Fiscal Impact:

Included in the FY 2021 Budget

Recommendation:

Staff recommends approval

**CHILDREN'S TRUST
OF
ALACHUA COUNTY**

**COMPENSATION AND CLASSIFICATION
STUDY**

**DRAFT FINAL REPORT
FOR REVIEW**

9 JULY 2020

THE MERCER GROUP, INC.

COMPENSATION AND CLASSIFICATION STUDY

DRAFT FINAL REPORT FOR REVIEW

I. BACKGROUND

The Children's Trust of Alachua County engaged the services of the Mercer Group, Inc. to conduct a classification and compensation study in order to develop a position pay grade structure coupled with a market based pay range structure to ensure that the Trust will be competitive within the market in which it is competing for employees.

II. METHODOLOGY

The Mercer Group, Inc. methodology for this classification and compensation study employed a combination of specific internal and external data which places the salary schedule into parity with the market and each position into parity with all other positions. From this internal and external data, pay levels are determined, positions are classified and placed into the salary schedule, and ongoing methods of maintaining the system are developed.

Detailed descriptions of the methodologies are described below.

A. Compensation/Market Survey Methodology

The Compensation/Market Survey is a data-collection process which ensures a fair and equitable comparison of the pay structure.

The core of this process is the comparison of the Trust's proposed pay plan with the pay plans of comparable organizations. The primary objective of the market survey and analysis is to determine how the compensation levels for the Trust's job classes compare to that of similar employers with whom the Trust must compete for employees.

The results of the market survey were used to construct a pay plan that will ensure the ability of the Trust to recruit and retain qualified employees and to provide an effective basis for managing salary costs.

Market Survey Employer Selection

The employers selected for the market survey were defined as accurately as possible the "Labor Market" within which the Trust competes. Organizations were selected using the following criteria:

Geographic Proximity - Comparison organizations located within a reasonable commuting distance were selected. Selecting employers in relatively close geographic proximity ensures that the market will reflect the area's cost of living, growth rate and other demographic characteristics.

Nature of Services Provided – Organizations were selected which provide a similar range of services, these organizations are most likely to compete with each other for employees, likely to have comparable jobs, and are likely to have similar organizational structures.

Each of these factors was taken into consideration in the identification of an appropriate labor market for the Trust.

The organizations from which data was obtained are:

- ALACHUA (CITY)
- ALACHUA COUNTY
- COLUMBIA COUNTY
- GAINESVILLE
- MARION COUNTY
- OCALA

Survey Benchmark Position Selection

The second step in preparing for the market survey is the identification and selection of Benchmark positions. The Benchmark positions are positions contained in the Trust's classification system for which adequate market matches can be found. Benchmark positions provide a reference point for developing salary recommendations for all non-Benchmark positions.

Benchmark positions are those which meet the following criteria:

- Well-defined positions presumed to exist within the local government organizations which are to be surveyed;
- Encompass a variety of skill levels within the organization;
- Reasonably well known and understood positions which are clearly and concisely described; and,
- Represent a variety of pay levels within the organization.

We found it appropriate and practicable to use all nine of the currently anticipated positions for the Trust.

The Benchmark positions selected for the comparison survey are listed below:

- **COMMUNICATIONS MANAGER**
- **COMMUNITY ENGAGEMENT COORDINATOR**
- **CONTRACT MANAGER**
- **DIRECTOR OF PROGRAM OPERATIONS**
- **EXECUTIVE ASSISTANT**
- **FINANCIAL AND ADMINISTRATIVE MANAGER**
- **FISCAL ASSISTANT**
- **PROGRAM MANAGER**
- **RESEARCH, PLANNING, AND EVALUATION MANAGER**

By combining the market survey data with the point factor system described below, both external equity and internal salary relationships (internal equity) are reflected in the resulting salary setting process.

B. Classification Methodology

The classification process began with a discussion of the existing and proposed positions essential for the operation of the Trust.

Position description questionnaires were completed followed by discussions with management to ensure a thorough understanding of each position. That understanding is critical, as it becomes the basis for the rating of each position using the Factor Evaluation System.

The Mercer Group, Inc. Factor Evaluation System (FES) is used to provide a numerical rating for all positions within the Trust that were included in the study.

Factor evaluation systems provide a method of classifying positions based on the work performed. The systems generally are easy to understand and apply and can be used to classify and re-classify both permanent and part-time positions.

In developing the factor system used by the Mercer Group, Inc. the following principles were applied:

- Important elements of each job should be measured by consistent factors.
- The factors must be explainable and clearly defined.
- Factors should relate to observable and measurable aspects of the job.
- Factors should relate to the business of the organization, i.e. local government.
- The number of factors should be limited for administrative ease but should reflect all aspects of the positions rated.

The factors used to identify the minimum requirements of each Trust position in the Mercer FES are:

Factor 1 - Knowledge Required:

Assigns points based on skills, knowledge, and educational level required by the job.

Factor 2 - Supervisory Controls:

Points are assigned based on the nature and extent of direct supervision required over the position.

Factor 3 - Supervision Exercised:

Measures the amount of supervision or management exercised by the position.

Factor 4 - Guidelines:

Measures the nature of existing guidelines and the judgment needed to apply them.

Factor 5 - Complexity:

Measures the nature, number, variety and intricacy of tasks, steps or processes in the work performed by the position.

Factor 6 - Scope and Effect:

Measures the nature of the work and its effect both inside and outside the organization.

Factor 7 - Personal Contacts:

Measures contacts with co-workers, the public and others required in performing the duties of the position.

Factor 8 - Purpose of Contacts:

Measures the level of informational exchange in the personal contacts identified in Factor 7.

Factor 9 - Physical Demands:

Includes physical characteristics and abilities needed as well as the level of exertion required in performing the duties of the position.

Factor 10 - Work Environment:

Considers the risks and discomforts in the physical surroundings.

Every position included in the study for the Trust was rated using this system. Those ratings were then used to determine where each position fits in the salary schedule of the Pay Plan. This process provided for internal equity of the positions.

III. EXHIBITS

Through analysis a list of comparable organizations was chosen to be surveyed regarding the minimum and maximum salary offered for similar positions as those of the Trust. The Mercer Group, Inc. collected information from 6 comparable organizations (as listed on page 3, above). This information in conjunction with the factoring was the basis for the recommended pay plan, below.

No individual employee's pay is determined by this survey data, nor is it accurate to compare an employee's actual salary with individual or aggregate salary information obtained for a particular Benchmark position.

RECOMMENDED PAY PLAN			
Grade	Minimum	Midpoint	Maximum
56	\$30,451.31	\$38,615.15	\$46,778.99
57	\$31,897.74	\$40,449.37	\$49,001.00
58	\$33,412.89	\$42,370.71	\$51,328.54
59	\$35,000.00	\$44,383.33	\$53,766.65
60	\$36,662.50	\$46,491.54	\$56,320.57
61	\$38,403.97	\$48,699.88	\$58,995.79
62	\$40,228.16	\$51,013.13	\$61,798.10
63	\$42,139.00	\$53,436.26	\$64,733.51
64	\$44,140.60	\$55,974.48	\$67,808.35
65	\$46,237.28	\$58,633.27	\$71,029.25
66	\$48,433.55	\$61,418.35	\$74,403.14
67	\$50,734.14	\$64,335.71	\$77,937.28
68	\$53,144.01	\$67,391.66	\$81,639.30
69	\$55,668.35	\$70,592.76	\$85,517.16
70	\$58,312.60	\$73,945.92	\$89,579.23
71	\$61,082.45	\$77,458.35	\$93,834.25
72	\$63,983.87	\$81,137.63	\$98,291.38
73	\$67,023.10	\$84,991.66	\$102,960.22
74	\$70,206.70	\$89,028.77	\$107,850.83
75	\$73,541.52	\$93,257.64	\$112,973.75
76	\$77,034.74	\$97,687.37	\$118,340.00
77	\$80,693.89	\$102,327.52	\$123,961.15

Once all positions were analyzed and factored and the pay plan was developed, the positions were grouped into pay grades as informed by total factor scores and market analysis.

RECOMMENDED POSITION TITLES BY PAY GRADE

GRADE	MINIMUM	MIDPOINT	MAXIMUM
56	\$30,451.31	\$38,615.15	\$46,778.99
57	\$31,897.74	\$40,449.37	\$49,001.00
58	\$33,412.89	\$42,370.71	\$51,328.54
59	\$35,000.00	\$44,383.33	\$53,766.65
60	\$36,662.50	\$46,491.54	\$56,320.57
61	\$38,403.97	\$48,699.88	\$58,995.79
FISCAL ASSISTANT			
62	\$40,228.16	\$51,013.13	\$61,798.10
EXECUTIVE ASSISTANT			
63	\$42,139.00	\$53,436.26	\$64,733.51
64	\$44,140.60	\$55,974.48	\$67,808.35
65	\$46,237.28	\$58,633.27	\$71,029.25
66	\$48,433.55	\$61,418.35	\$74,403.14
67	\$50,734.14	\$64,335.71	\$77,937.28
68	\$53,144.01	\$67,391.66	\$81,639.30
CONTRACT MANAGER			
69	\$55,668.35	\$70,592.76	\$85,517.16
70	\$58,312.60	\$73,945.92	\$89,579.23
PROGRAM MANAGER - PRITZKER COMMUNICATIONS MANAGER COMMUNITY ENGAGEMENT COORDINATOR			
71	\$61,082.45	\$77,458.35	\$93,834.25
72	\$63,983.87	\$81,137.63	\$98,291.38

<u>73</u>	<u>\$67,023.10</u>	<u>\$84,991.66</u>	<u>\$102,960.22</u>
FINANCIAL AND ADMINISTRATIVE MANAGER RESEARCH, PLANNING, AND EVALUATION MANAGER			
<u>74</u>	<u>\$70,206.70</u>	<u>\$89,028.77</u>	<u>\$107,850.83</u>
<u>75</u>	<u>\$73,541.52</u>	<u>\$93,257.64</u>	<u>\$112,973.75</u>
DIRECTOR OF PROGRAM OPERATIONS			
<u>76</u>	<u>\$77,034.74</u>	<u>\$97,687.37</u>	<u>\$118,340.00</u>
<u>77</u>	<u>\$80,693.89</u>	<u>\$102,327.52</u>	<u>\$123,961.15</u>

IV. SPECIAL PROVISIONS AND RECOMMENDATIONS

The Mercer Group, Inc., offers the following provisions and recommendations:

A. Hiring Offer

We recommend allowing the hiring of applicants who exceed the minimum qualifications for the position under recruitment at up to the Mid-point of the salary grade as determined and approved by the Executive Director.

B. Annual Market Adjustment

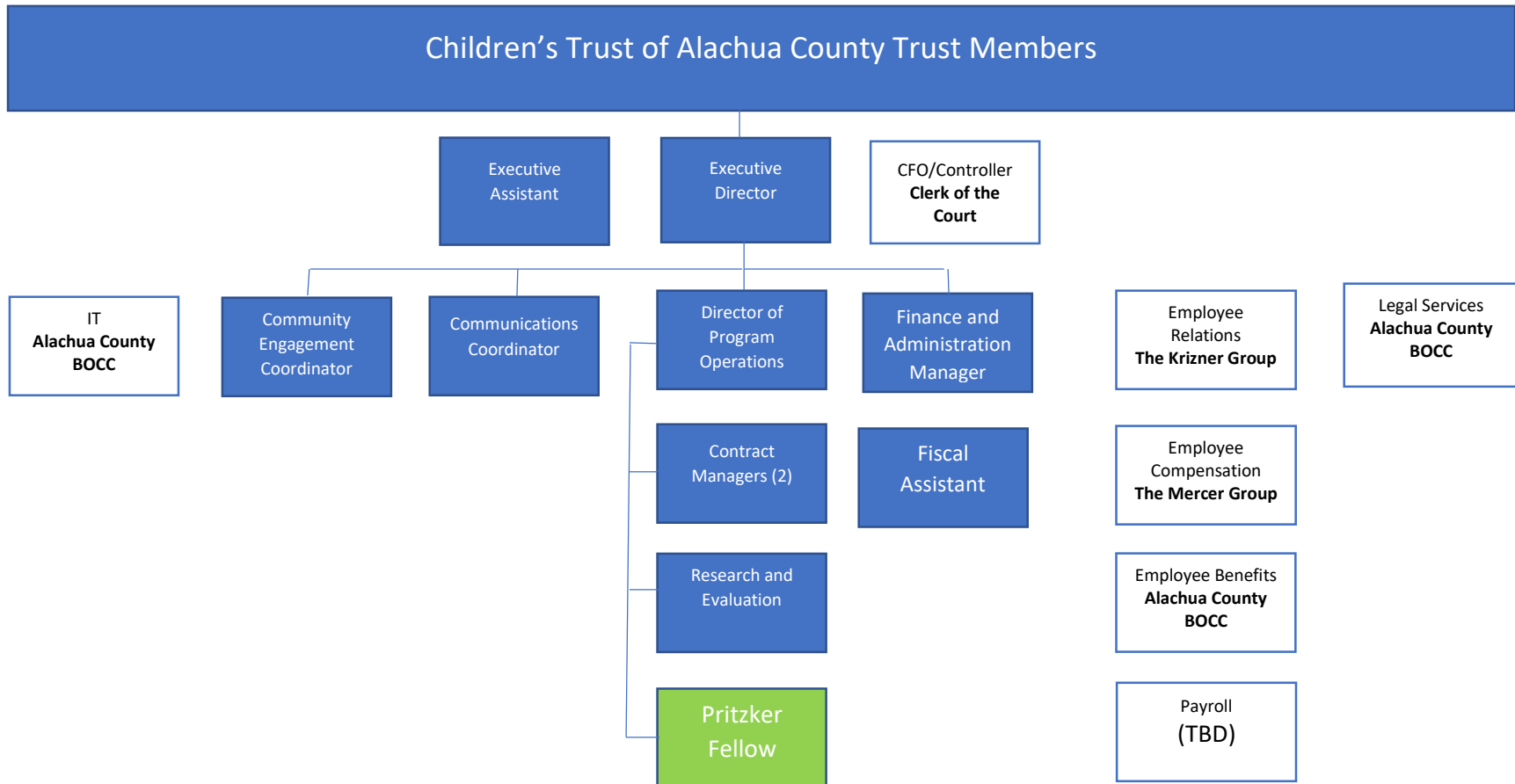
We recommend the Trust make an annual adjustment to the Pay Plan as well as employee salaries based on an analysis of the Consumer Price Index or other indices most reflective of the true cost of living for the Alachua County area.

C. Reclassification

When a new position is created or there is a need for a reclassification of an existing position, a Position Questionnaire (as used in the Study) should be completed. The Position questionnaire should then be evaluated using the Factor Evaluation System to determine the Pay Grade, thus continuing to maintain the internal equity of the position array across the pay plan.

Organizational Chart
8.3.20

Item 11.



CHILDREN'S TRUST OF ALACHUA COUNTY

RESOLUTION 2020-9

CHAPTER 5 HUMAN RESOURCES

WHEREAS, the Children's Trust of Alachua County (CTAC) desires to have human resource policies; and

WHEREAS, the Children's Trust of Alachua County desires to adopt Chapter 5 Human Resources as its policies,

NOW THEREFORE, be it ordained by the Board of the Children's Trust of Alachua County, in the State of Florida, as follows:

SECTION 1: ADOPTION Chapter 5 Human Resources attached hereto as Exhibit "A", is hereby adopted in its entirety as provided in Exhibit "A" and incorporated herein by this reference.

SECTION 2: EFFECTIVE DATE This Ordinance shall be in full force and effect from 10.1.2020 and after the required approval and publication according to law.

PASSED AND ADOPTED BY THE CHILDREN'S TRUST OF ALACHUA COUNTY BOARD. _____.

	AYE	NAY	ABSENT	ABSTAIN
Lee Pinkoson	_____	_____	_____	_____
Dr. Maggie Labarta	_____	_____	_____	_____
Tina Certain	_____	_____	_____	_____
Karen Clarke	_____	_____	_____	_____
Dr. Karen-Cole Smith	_____	_____	_____	_____
Ken Cornell	_____	_____	_____	_____
Dr. Nancy Hardt	_____	_____	_____	_____
Dr. Patricia Snyder	_____	_____	_____	_____
Cheryl Twombly	_____	_____	_____	_____
Susanne Wilson Bullard	_____	_____	_____	_____

Presiding Officer

Attest

X

Lee Pinkoson
Chairman

X

Tina Certain
Treasurer

EXHIBIT “A”

5.10 Recruitment And Selection

- A. **General Rule.** All employees shall be hired by competitive selection in accordance with policies established by the Board and procedures established by the Executive Director.
 - 1. No position shall be filled unless a vacancy has been posted in accordance with recruitment and selection procedures, except as otherwise provided by policy
 - 2. CTAC employees who have exited under the State of Florida Deferred Retirement Option Program (DROP) shall not be eligible for re hire for twelve (12) months following their termination under DROP. Once the twelve (12) month period after terminating has elapsed, the DROP employee may be re-hired pending Board approval.
- B. **Exceptions to the General Rule.** Under special circumstances, the Executive Director may waive the general rule of competitive selection. Special circumstances include:
 - 1. When the applicant has recently participated in the competitive selection process for another position.
 - 2. When an employee is successfully acting in a position, as long as the employee meets the minimum qualifications.
 - 3. Other circumstances where applying the general rule will significantly hamper Trust operations.
 - 4. A position may be filled while the the incumbent is still in the position, when the Executive Director determines that overlap is necessary.

5.20 Employment And Opportunity Listing

- A. CTAC will advertise all vacancies on CTAC's web page.
- B. Managerial positions, and in extenuating circumstances, positions which traditionally experience recruitment difficulties, will also be advertised in local, regional, and/or national media.

5.30 Referring Applicants

- A. **Referring Employment Applications.** Applications will be screened by the hiring manager for applicants that meet the minimum qualifications for the position.
- B. **Veterans' Preference.** When selecting applicants for initial interviews, education, training and experience shall be considered along with Veterans' Preference in accordance with Chapter 295, Florida Statutes and Chapter 55A-7, Florida Administrative Code. Applicants who have submitted the required Veterans' preference documentation, and are determined to be eligible for Veterans' preference, will be identified by the Human Resources Office when the referral is made to the hiring

supervisor. An applicant eligible for Veterans' Preference will be given special consideration at each step of the employment selection process.

5.40 Interviewing Applicants

- A. **Interview Process.** Interviews may be conducted by the hiring supervisor or by a selection committee. When using a selection committee, a member of the committee must attend all interviews in order to provide input to the hiring supervisor. All interview and simulation materials to be used by the department shall be approved in advance by the department director or designee and/or the Human Resources Office.
 - 1. A single list of questions and simulation materials must be developed prior to the interviews, and be asked to all interviewed applicants. Additional questions may be asked to clarify answers or to address entries on the application.
 - 2. The interview questions must be job-related and seek information regarding the applicant's job-related qualification.
- B. **Applicant Screening.** All qualified applicants may be interviewed, or the applicant pool may be reduced by screening the applications according to job-related criteria
 - 1. The screening process requires consistent application of screening criteria, without regard to race, color, religion, age, marital status, sex, national origin, disability, sexual orientation, gender identity or expression, political affiliation, or other information that is not job-related. b. The result of each step of the process - screening criteria, written assessment, oral interview, etc. - will be documented for each applicant in the electronic hiring system.
 - 2. If the applicant does not meet the hiring manager's expectations at each step, (s)he will remain at that step while the successful applicants advance to the next step in the process.
- C. **Reference Checks.** Reference Checks should be the final interview step and should only be done on the top one or two final applicants the department is considering for hire.
 - 1. The results of the reference checks are maintained in the hiring department along with all other recruitment interview materials in accordance with State and federal statutes.
 - 2. Most positions require reference checks to be maintained for three years; however, many federal grants require five years

5.50 Selection Process

- A. **Selection Process-**After review by the Executive Director, the hiring supervisor may make an offer of employment contingent upon drug test results and, if applicable,

results of pre-employment physical, criminal background check and drivers license check

- B. **Drug Test/Pre-Employment Physical/Criminal Background Check/Drivers License Check.** Upon approval of the interview process and CTAC staff will coordinate a drug test, pre-employment physical and/or criminal background check as applicable. Upon notification of successful completion, the Executive Director will give approval to hire.

5.60 Compensation And Benefits

A Pay Plan shall be established and approved by the Board, for all classifications in the Classification Plan. The Pay Plan shall include a listing of all approved classifications with a salary range identifying the minimum and maximum rates of pay for each classification. The Executive Director or designee shall be responsible for the maintenance of the Pay Plans in accordance with sound compensation practices.

5.70 Classification System

- A. **Classification System.** The classification system is an evaluation process that compares positions in terms of relative contribution to the organization and clusters positions accordingly to ensure that positions of equal difficulty and requirements are equitably compensated.
- B. **Composition of the Classification System.** The classification system consists of the following:
1. A grouping of positions into classes;
 2. A class specification containing a title, listing of knowledge, skills, abilities, core competencies, minimum qualifications and licenses required for each class;
 3. A description for each job within a class, listing the type of work, the scope of duties and responsibilities, and supervisory responsibilities; and
 4. A pay grade allocation for each class based on:
 - a. Job analysis,
 - b. Salary surveys,
 - c. Internal equity surveys, and
 - d. History of recruitment and retention challenges.

5.80 Starting Pay

- A. **General Rule.** Typically, the minimum salary established for the position's classification is considered the starting salary for a new employee.

B. Exceptions to the General Rule.

1. The Executive Director or designee has the discretion to hire at up to the midpoint of the assigned salary range for the classification.
2. Hiring at greater than the midpoint of the assigned salary range for the classification requires the approval of the CTAC.
3. Budgetary constraints must be followed when making compensation decisions that are exceptions to the general rule stated above.

5.90 Pay Plan Adjustment

- A. **General Rule.** An employee in a classification whose salary range is adjusted upward shall receive a percentage salary increase equal to the percentage increase of the minimum of the range.
- B. **Downward Adjustment.** If the salary range of a classification is adjusted downward, the salaries of the current employees in that classification will not be affected.
- C. Executive Director may limit the percentage salary increase for all employees in affected classifications.

File Attachments for Item:

12. Adoption of Resolution 2020-10 Membership into the Florida Retirement System

**Item:**

Adoption of Resolution 2020-10 Membership into the Florida Retirement System

Requested Action:

The Trust is asked to approve Resolution 2020-10 authorizing the Trust to join the Florida Retirement System, and authorize the Executive Director to execute any agreements necessary to extend FRS benefits to CTAC employees.

Background

At the June 10, 2019 Trust meeting, the CTAC authorized Trust employees to be hired as Alachua County Board of County Commissioners employees for budgetary purposes under Personnel Policy 4.2(1.e). As part of the policy, Trust employees participate, via the Intralocal Agreement, in the BoCC's benefits program, which includes participation in the Florida Retirement System (FRS).

As part of the transition from BoCC employees to Children's Trust Employees, the CTAC must join the FRS as a separate entity. Membership in the FRS would be irrevocable and participation would be mandatory for all employees.

Attachments

Resolution 2020-10

Programmatic Impact:

NA

Fiscal Impact:

None. The Trust currently pays the full cost of of Trust employees to participate in the Florida Retirement System.

Recommendation:

Staff recommends approval

CHILDREN'S TRUST OF ALACHUA COUNTY
RESOLUTION No. 2020-10
PARTICIPATION IN THE FLORIDA RETIREMENT SYSTEM

WHEREAS the Children's Trust of Alachua County (Trust) was established by Alachua County Ordinance 18-08 which was adopted by the voters of Alachua County on November 6, 2016, and

WHEREAS, the Trust is required by its enabling law to employ an Executive Director; and

WHEREAS, the Trust is an Independent Special District and taken previous action showing its intent to participate in the Florida Retirement System, and

WHEREAS, the Trust has and will continue to employ staff members for whom they wish to provide for participation in a retirement plan; and

WHEREAS, the Trust, the Alachua County Board of County Commissioners (the "County") and the Clerk of Court (the "Clerk") have entered into an interlocal agreement (the "Interlocal" which provides that the County will employ the Trust's employees in accordance with County Personnel Policy 4-2(1.e), and the Trust will reimburse the County for all expenses related to those employees, and

WHEREAS, the Trust intends that at a point in the near future it will move to an independent payroll system and become an employing entity separate and apart from Alachua County; and

WHEREAS, the Trust voted at their meeting on June 10, 2019 to participate in the Florida Retirement System; and

WHEREAS, the Florida Retirement System requires a formal resolution from the Trust to confirm this. Therefore

IT IS HEREBY RESOLVED BY THE CHILDREN'S TRUST OF ALACHUA COUNTY AS FOLLOWS:

1. The action taken by the Trust at their meeting of June 10, 2019 is hereby ratified and the Trust confirms its desire to participate in the Florida Retirement System.
2. The Executive Director is authorized to execute such documents as are necessary to complete the entry of the Trust into the Florida Retirement System.
3. This shall be effective upon approval.

PASSED AND ADOPTED BY THE CHILDREN'S TRUST OF ALACHUA COUNTY BOARD.
_____, 2020.

	AYE	NAY	ABSENT	ABSTAIN
Lee Pinkoson	_____	_____	_____	_____
Dr. Maggie Labarta	_____	_____	_____	_____
Tina Certain	_____	_____	_____	_____

	AYE	NAY	ABSENT	ABSTAIN
Karen Clarke	_____	_____	_____	_____
Dr. Karen-Cole Smith	_____	_____	_____	_____
Ken Cornell	_____	_____	_____	_____
Dr. Nancy Hardt	_____	_____	_____	_____
Dr. Patricia Snyder	_____	_____	_____	_____
Cheryl Twombly	_____	_____	_____	_____
Susanne Wilson Bullard	_____	_____	_____	_____

32

33

34

35

36

37 ATTEST

38

39

40 Tina Certain, Treasurer

Lee Pinkoson, Chair


41

APPROVED AS TO FORM

42

43

44



Counsel

CHILDREN'S TRUST OF ALACHUA COUNTY
OPTIONS FOR CTAC STAFFING INCLUDING EXECUTIVE DIRECTOR AND OTHER STAFF

Discussion Points to Consider for each Option:		Option A - Regular County Employee	Option B - Budgeted, Non-BOCC Employee	Option C - Direct Hire by CTAC
1 County Personnel Policies or CTAC Personnel Policies		County Personnel Policies	CTAC Personnel Policies	CTAC Personnel Policies
2 Reported to IRS & FRS as County Employee or CTAC		County	County	CTAC
3 Position(s) Report Directly to CTAC (Y or N)		Yes	Yes	Yes
4 Interlocal Agreement or Direct Hire		Interlocal Agreement	Interlocal Agreement	Direct Hire not part of Interlocal
5 Salary and Benefit Package		Costs can be same for Options A-C	Costs can be same for Options A-C	Costs can be same for Options A-C
6 County Reimbursed by CTAC for Salary and Benefits		Yes	Yes	No - paid directly by CTAC
7 Creation of new HR/Payroll Software (Y or N)		No	No	Yes
Financial Impact on Administrative Services:				
1 HR Services		\$0	Per Hour Charge- TBD*	\$8,000
2 Equal Opportunity		\$0	Per Hour Charge- TBD*	Per Hour Charge- TBD*
3 Payroll Services		\$0	\$0	\$10,000
4 Audit Fees		\$0	\$0	\$2,500 - \$4,000
5 Software License Fees for new HR/Payroll System		\$0	\$0	\$5,000
6 Risk Management		\$0	\$0	Per Hour Charge- TBD*
7 Office Space		If new external space- Actual Cost	If new external space- Actual Cost	If new external space- Actual Cost
Option Highlights:		Under this option the Executive Director position would follow all County Personnel Policies. The position's sole purpose would be to serve CTAC but all hiring & firing decisions would be in accordance with the County's Personnel Policies unless specifically amended via terms in the interlocal agreement. County would be reimbursed by CTAC for actual cost of the position, including benefits.	Allowed per County HR Policy 4-2 (1.e.) - The Executive Director position would be funded by the BOCC as an FTE but serve at the pleasure of CTAC pursuant to their employment contract. The Executive Director would receive their paycheck from the BOCC and be reported to the IRS and FRS under the County's Tax ID# but would be exempt from BOCC Personnel Policies. CTAC would adopt their own standalone Personnel Policies. County would be reimbursed by CTAC for actual cost of the position, including benefits.	Executive Director position hired directly by CTAC. Not part of the interlocal agreement. The position would be created in a standalone single use HR/Payroll system. The Executive Director would receive their paycheck directly from CTAC and would have to comply with CTAC's adopted Personnel Policies. If CTAC chooses to offer same benefit packages as other governmental entities would need to enroll with FRS, ICMA or Nationwide 457, Section 125 Cafeteria Plan, & decide on a Health Plan.
Footnotes:		N/A	* Flat hourly rate to be negotiated then billed as incurred.	* Flat hourly rate to be negotiated then billed as incurred.

The Department of Management Services, Division of Retirement, of the State of Florida, under the authority of Chapter 121, Florida Statutes, and Children's Trust of Alachua County of the State of Florida, in order to extend to General Employees of said Children's Trust of Alachua County (except such as are hereinafter excluded) the benefits of the Florida Retirement System established by Chapter 121, Florida Statutes, hereby agree as follows:

1. Definitions:

For the purpose of the Agreement -

(a) The definitions, words and phrases as set out in Section 121.021, Florida Statutes, shall have the respective meanings set forth therein.

2. Services Covered:

The agreement includes and covers all services performed by General Employees of this Children's Trust of Alachua County except any service, position, employee, or official excluded by Chapter 121, Florida Statutes, the rules and regulations of the Florida Retirement System, or resolution/ordinance No. _____ adopted by the Children's Trust of Alachua County on the _____ day of _____, 20____. The Florida Retirement System is not responsible for nor does it assume any local retirement plan liabilities.

3. Contributions by Employees:

The Children's Trust of Alachua County agrees to impose upon its employees covered by this Agreement the required contributions with respect to wages if such services constituted employment within the meaning of Chapter 121, Florida Statutes, and to deduct the amount of such required contributions from the wages as and when paid. Contributions so collected shall be paid to the Administrator of the Florida Retirement System in partial discharge of the liability of said Children's Trust of Alachua County, said payments to be made in accordance with rules and regulations relating to the Florida Retirement System. It is agreed and understood that the failure of said to deduct such contributions shall not relieve it of liability therefore.

4. Contributions by the Children's Trust of Alachua County:

(a) The Children's Trust of Alachua County represents that it has duly and legally adopted, and that there is now in full force and effect, a resolution/ordinance requiring an appropriation from available funds in its general or special funds derived from ad valorem tax or other sources, which shall be in an amount not less than the sums withheld as the contributions of employees covered by the Agreement, the sum to equal the total amount due from said Children's Trust of Alachua County (employer's and employee's contributions) under applicable provisions of Chapter 121, Florida Statutes.

(b) As assurance of its ability to pay its share of the contributions which will become due and payable to the Administrator under the terms of this Agreement and as assurance that said contributions will be adequate, the Children's Trust of Alachua County hereby obligates itself to maintain, and represents that at all times hereafter there will be maintained, in the appropriation provided in paragraph 4.(a), above, a sum fully sufficient to pay its share of the contributions: and that same (together with contributions deducted from salaries, wages, etc., of employees) will be paid promptly when due.

5. Reports-Compliance and Regulations:

Item 12.

The Children's Trust of Alachua County agrees that it will make such reports, in such form and containing such information, as the Administrator may require. The Children's Trust of Alachua County further agrees that it will comply with all provisions of Chapter 121, Florida Statutes, and with all rules and regulations adopted and promulgated by the Administrator of the Florida Retirement system necessary to carry out the purposes of Chapter 121, Florida Statutes. It is further understood and agreed that late payments come under provisions of Section 121.061, paragraphs (2) (a), (b) and (c), Florida Statutes.

6. Termination:

Once this agreement is made and approved it may not be revoked and all present General Employees electing coverage under this agreement and all future General Employees shall be compulsory members of the Florida Retirement System.

Clerk
(SEAL)

Children's Trust of Alachua County

By _____

Title: _____

This Agreement shall be effective as of the ____ day of _____, 20____.

Approved this ____ day of _____ 20____.

Director of the Division of Retirement

CONTRIBUTION REQUIREMENTS

FRS participating employers shall pay retirement contributions on all covered group employees filling full-time or part-time regularly established positions as defined by Rule 60S-1.004(4), Florida Administrative Code. Employers shall pay retirement contributions to the Division by electronic funds transfer no later than the 5th working day of the month immediately following the month that the payroll ends (for example: the July payroll is due the 5th working day in August). Along with the retirement contributions, employers must submit the retirement file and contribution summary. Employer contributions or retirement file received after the 5th working day of the month shall be considered late and the employer shall be assessed a penalty of 1 percent of the total contributions due.

Employers with employees in the FRS Investment Plan have an additional incentive to report retirement contributions on time, since the employees' retirement benefits are based on the contributions made to their Investment Plan account, plus any gains or losses. Please be aware that Investment Plan contributions are not sent to the employee's account until the contributions are actually paid; therefore a late submission of contributions may negatively affect those employees. In addition to the 1 percent delinquent fee for reporting late contributions, the employer will also be charged loss of earnings on Investment Plan contributions. Data on FRS Online is property of the State of Florida, Department of Management Services. All activity on this website is subject to being intercepted, recorded, read, copied and disclosed by, and to, authorized personnel for official purposes including criminal investigations. Access or use of this website by any person, whether authorized or unauthorized, constitutes consent to these terms.

By signing, I have read and understand the above requirements for FRS employer Contributions.

Authorized Personnel

Date

Name Printed

Title

CONTRIBUTION REQUIREMENTS

PAGE 1 OF 1

Children's Trust of Alachua County

FLORIDA RETIREMENT SYSTEM ENROLLMENT PROCESS WORKSHEET

**THIS DOCUMENT, AND ALL REQUESTED INFORMATION, MUST BE COMPLETED
AND RETURNED PRIOR TO JOINING.**

GENERAL INFORMATION

<p>_____ Current Retirement Plan</p> <p>_____ Certified Financial Statement per Chapter 121.051(2)(b)1, if applicable</p> <p>_____ List of current employees</p> <p>_____ Establishing Document</p> <p>_____ Federal Identification Number</p> <p>_____ Contact Information</p> <p>Person responsible for reporting: _____</p> <p>Address: _____</p> <p>_____</p> <p>Telephone Number: _____</p> <p>Fax Number: _____</p> <p>Email Address: _____</p>	<p>Please include, in a cover letter, explaining what will become of your current retirement plan(s). If you do not have a current retirement plan initial here _____</p> <p>This document was used to create your organization.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
---	--

I, _____, certify that the above information is accurate.

print name

Signature

Date

ENROLLMENT PROCESS WORKSHEET

GENERAL INFORMATION

PAGE 1 of 1

Children's Trust of Alachua County

File Attachments for Item:

13. Star Center Children's Theatre Inc. in the News



Entertainment

Summer Camp a success in spite of COVID-19

By Aida Mallard

Posted Jun 17, 2020 at 10:33 AM

In spite of the novel coronavirus, 25 campers ages 6-17 at the Super Smart Summer Camp appeared thrilled Friday to be around their peers albeit social distancing and wearing face masks.

Hosted by the Star Center Theatre, the award-winning camp featured academics and arts curriculum, a robust safety protocol and lots of fun in the mix.

Angela Terrell, public relations officer at the Star Center, said the camp is following strict COVID -19 guidelines to ensure safety and includes social distancing, a lower than normal student/teacher ratio and teacher assistants who are responsible for disinfecting and cleaning learning spaces and the eating area.

One week into the camp, campers on Friday engaged in age appropriate classes and activities.

The campers are taught by licensed, certified teachers in a curriculum that includes computer learning, science, social studies, reading, piano classes, violin classes, dance classes, voice classes, and drama and theatre classes and more. There are camp counselors to help and guide campers.

Terrell said “In spite of the challenges we face due to the COVID-19 pandemic, our campers are experiencing great success.”

”

“The arts are created for personal interaction and our staff has found ways to implement creative interactive learning without compromising the health and safety of our campers,” Terrell said. “We can hardly wait for our campers to shine as they share with their families during our end of camp activities.”

Campers have been rehearsing and preparing for two culminating activities — The Music Rehearsal where they show off what they’ve learned at camp and the Broadway style theatre production of “Peter Pan,” which are set for June 18 and 19 and open to the public. The productions will be presented on an outdoor stage with opportunities for parents to watch the show while social distancing.

For approximately 20 years, the Star Center Theatre has provided affordable arts education and performance opportunities to countless area youths and their families. The camp, which has been a summer favorite since its inception in 2004, is held for three weeks during June.

As the coronavirus continues to ravage the U.S and the rest of the world, Terrell said the Star Center closed in early March, and after much consideration and the implementation of robust safety protocols the camp opened on schedule June 1.

Terrell said the computer lab benefited from two computers provided by the Cultural Art Coalition and its executive director Nkwanda Jah.

Tradina Thomas, who is teaching computer classes, said the campers are learning art and music terms, rhythms and composition in an age-appropriate model.

“The kids are getting the routine and it’s been working well,” Thomas said. “They are participating, learning, and having fun.”

Six-year-old Leeantwan said he is looking forward to science class and making slime. As far as wearing a mask, he said he doesn’t mind it except when his glasses get foggy.

Carrington, a rising sixth-grader visiting from Atlanta and the granddaughter of Terrell, said this is her third year at camp and acting is her favorite class. She plans to become a TV actress.

“It (camp) takes some adjusting — being six feet apart and wearing masks except when we’re eating,” said Carrington. “Otherwise camp is as normal as ever.”

Peyton said this is his first time at camp, but he will be back next year.

“It’s fun and I like dancing and playing Limbo,” he said.

Alanis, a rising 8th-grader, said she is trying to adjust. “The upside is camp is very fun and you get to see people, interact and connect with friends,” said Alanis.

Amarria, who is a lead counselor at the camp, said her job is to encourage and guide campers. She has implemented a reward system where campers and other counselors receive rewards for effort and good behavior.

Dr. Sulmarie Duncan, who for three years now has been in charge of camp operations, said the challenge is keeping kids moving and on task, and teaching them about social distancing and why they must wear face masks.

The takeaway said Duncan is “We’re all in this together. We’re responsible for each other. We are – indeed – our brother’s keeper.”

Rhonda Wilson, founder of the Star Center and the Super Smart Summer Camp, said the camp participants are mostly regulars and a few new kids.

“It’s been a success,” said Wilson. “Really good.”

File Attachments for Item:

14. ACES Articles from the Gainesville Sun (2017)

Re: ACEs articles from Gainesville Sun 2017

Nancy Hardt <nhardt@gmail.com>

Mon 7/13/2020 4:40 PM

To: Colin Murphy <cmurphy@childrenstrustofalachuacounty.us>;

CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially from unknown senders.

Happy to share them. It is a body of work to support what Sherry Kitchens said. ACEs are at the base of everything we are trying to do: health, safety, education, equity. The community is getting more and more trauma informed and trauma responsive. The Trust needs to be, too. Maybe it would be better to be on the agenda for our workshop/retreat? What do you think?

N

On Sun, Jul 12, 2020 at 11:07 PM Colin Murphy <cmurphy@childrenstrustofalachuacounty.us> wrote:

Thank you.

I read "The Deepest Well".

Would you like me to include these this in the next board packet?

Colin

From: Nancy Hardt <nhardt@gmail.com>

Sent: Sunday, July 12, 2020 4:22 PM

To: Colin Murphy <cmurphy@childrenstrustofalachuacounty.us>

Subject: Fwd: ACEs articles from Gainesville Sun 2017

CAUTION: This email originated from outside your organization. Exercise caution when opening attachments or clicking links, especially from unknown senders.

I think I promised to send these to you. Finally found them

Nancy Hardt: A physician's confession
Gainesville Sun, The (FL) - January 13, 2017Browse Issues

Author/Byline: Nancy Hardt Special to The SunSection: Opinion

The most important thing I didn't learn in medical school is about adverse childhood experiences, also known as ACEs.

To be sure, if I had understood them then the way I do now, I would have been a better and more compassionate physician. Importantly, I would have avoided lots of mistakes.

What kind of mistakes, you ask?

I was pretty much a failure taking care of smokers, drinkers, drug addicts and morbidly obese people. People who were chronically depressed or in chronic pain were not helped by me either.

I never understood that addictions to food, drugs, alcohol and cigarettes are just imperfect solutions to the effects of toxic stress resulting from adverse childhood experiences. Toxic stress sets up pathways in the brains of traumatized children, pathways which persist into adulthood. We don't outgrow these pathways, so as we get older, we try "home remedies" to treat them.

My mistake was to try over and over to get people to give up cigarettes, alcohol, pills or overeating without addressing the reasons these things provide comfort. I was never taught that the stress receptors in our brain that are soothed by these substances are set up in early childhood.

Our early experiences create memories that become structural realities in our brains. To try to address chronic pain with pills simply compounds the problem by adding a new one: addiction.

I failed to find out what kind of pain people were facing. I was not taught to ask the right questions. The ACEs questions.

Doctors Vince Felitti and Rob Anda found the connection between adverse childhood experiences and chronic illness in adults during research on insured middle-class people. When I learned this, I became intrigued. Could this information help me understand health disparities better?

Indeed it did, leading my career away from caring for one patient at a time and toward caring for people. Lots of people. A neighborhood of people, a community of people.

I learned that there is hope accompanying learning about ACEs in our community.

Resilience can overcome the effects of toxic stress. As adults, we can't undo the early childhood trauma we experienced. But our ability to develop resilience starts in early childhood and never goes away.

We can develop resilience in ourselves, and we can help others develop it in themselves.

In fact, if you suffered ACEs as a child and are living an adult life free of addiction and chronic illness, you have someone to thank for it. Someone helped foster your resilience.

Our understanding of ACEs and the developmental effects of them have revolutionized the way communities think about young children. Investments in preschool education, health care for children and addressing behavior problems in school have been found to be not only wise but enriching. Yes, community money spent early saves enough to make a community prosper later.

A lot is happening in Gainesville and Alachua County to avoid trauma in pre-kindergarten children and their families. Gainesville For All teams are addressing important social structures and supports for young children, Peace4Gainesville is enhancing systems understanding of adverse childhood experiences and resilience, Partnership for Strong Families is providing supports to vulnerable families, and our County Commission is poised to make significant strategic investments in preschool children.

For older children, Alachua County Schools are coordinating with law enforcement to reduce disproportionate contact of minority youth with juvenile justice, and the River Phoenix Center for Peacebuilding is fostering reconciliation and enhancing resilience in those experiencing trauma.

Today we launch a multi-part series with noted journalist Jane Stevens. She will bring us up to speed on the current understanding of early adversity and its effect on early childhood brain development.

Stevens has been writing on this topic for more than a decade, and will share content from ACEStoohigh.com and the ACEs Connection. Join me on this journey to learn about toxic stress and the power of resilience to overcome it.

- Nancy Hardt is a professor emerita in the University of Florida College of Medicine.

Jane Ellen Stevens: A better understanding of childhood trauma
Gainesville Sun, The (FL) - January 13, 2017Browse Issues

Author/Byline: Jane Ellen Stevens Special to The SunSection: Opinion

It was 1985, and Dr. Vincent Felitti was mystified. The physician, chief of Kaiser Permanente's Department of Preventive Medicine in San Diego, couldn't figure out why more than half of the people in his obesity clinic dropped out.

A cursory review of all the dropouts' records astonished him - they'd all been losing weight when they left the program, not gaining. Why would people who were 300 pounds overweight successfully lose 100 pounds, and then drop out?

The mystery turned into a 25-year research project including the Centers for Disease Control and Prevention and more than 17,000 members of Kaiser Permanente. They discovered that adverse experiences in childhood were very common, and that these experiences are linked to every major chronic illness and social problem that the United States spends billions of dollars to address.

To solve the mystery, Felitti did face-to-face interviews with a couple hundred of the dropouts. He used a standard set of questions for everyone. For weeks, nothing unusual came of the inquiries.

The turning point came by accident. The physician was running through yet another series of questions with yet another obesity program patient: How much did you weigh when you were born? How much did you weigh when you started first grade? How old were you when you became sexually active? How old were you when you married?

"I misspoke," he recalled. "Instead of asking, 'How old were you when you were first sexually active,' I asked, 'How much did you weigh when you were first sexually active?' The patient, a woman, answered, '40 pounds.'"

He didn't understand what he was hearing. He misspoke the question again. She gave the same answer, burst into tears and added, "It was when I was four years old, with my father."

He suddenly realized what he had asked.

"I remembered thinking, 'This is only the second incest case I've had in 23 years of practice'," Felitti recalls. "I didn't know what to do with the information. About 10 days later, I ran into the same thing. It was very disturbing. Every other person was providing information about childhood sexual abuse. I thought, 'This can't be true. People would know if that were true. Someone would have told me in medical school.'"

Of the 286 people interviewed, most had been sexually abused as children. Another piece of the puzzle dropped into place during an interview with a woman who had been raped when she was 23 years old. In the year after the attack, she told Felitti that she'd gained 105 pounds.

"As she was thanking me for asking the question," Felitti said, "she looks down at the carpet, and mutters, 'Overweight is overlooked, and that's the way I need to be.'"

During that encounter, a realization struck Felitti. It's a significant detail that many physicians, psychologists, public health experts and policymakers haven't yet grasped: The obese people that Felitti was interviewing didn't see their weight as a problem. To them, it was a solution.

One way it helped was to soothe their anxiety, fear, anger or depression - it worked like alcohol or tobacco or methamphetamines.

The other way it helped was that, for many people, just being obese solved a problem. In the case of the woman who'd been raped, she felt as if she were invisible to men. In the case of a man who'd been beaten up when he was a skinny kid, being fat kept him safe, because when he gained hundreds of pounds, nobody bothered him.

For some people, both motivations were in play. Losing weight uncovered their anxiety, depression and fear to levels that were intolerable.

What Felitti learned had impact beyond a weight clinic in San Diego. Understanding adverse childhood experiences would provide a new understanding of the lives of hundreds of millions of people around the world who cope with their fear, anxiety, depression or anger by using alcohol, marijuana, food, sex, tobacco, violence, methamphetamines and even overachieving and thrill sports.

Public health experts, social service workers, educators, therapists and policy makers commonly regard addiction as a problem. Some, however, are beginning to grasp that turning to drugs is a "normal" response to serious childhood trauma, and that telling people who smoke or overeat or overwork or use drugs that these are bad for them doesn't sway or convince them when addiction provides a complicated but temporarily gratifying solution.

- Jane Ellen Stevens is founder and publisher of ACEs Connection Network, comprising the news site ACEsTooHigh.com and its accompanying social network, ACEsConnection.com.

Jane Ellen Stevens: Childhood trauma linked to health issues
Gainesville Sun, The (FL) - February 10, 2017Browse Issues

Author/Byline: name: Jane Ellen Stevens Special to The SunSection: Opinion

So if you were Dr. Vincent Felitti, chief of Kaiser Permanente's Department of Preventive Medicine in San Diego, which audience would you think would be interested in your stunning findings that many morbidly obese people had been sexually abused during childhood? A group relatively informed about obesity — the North American Association for the Study of Obesity.

In 1990, Felitti flew to Atlanta to give a speech to the members — many of them psychologists and psychiatrists. The audience listened quietly and politely. When he finished, one of the experts blasted him. "He told me I was naïve to believe my patients, that it was commonly understood by those more familiar with such matters that these patient statements were fabrications to provide a cover explanation for failed lives!"

Seated next to Felitti at dinner was Dr. David Williamson, an epidemiologist from the U.S. Centers for Disease Control and Prevention. Far from critical of the findings, Williamson was intrigued. He leaned over and "told me that people could always find fault with a study of a couple of hundred people," Felitti said, "but not if there were thousands, and from a general population, not a subset like an obesity program. I turned to him and said, 'That's not a problem.'"

Williamson invited Felitti to meet with a small group of CDC researchers. Dr. Robert Anda, a medical epidemiologist, was among them. Anda is a physician intrigued with epidemiology and public health. When he met Felitti, he had been studying the effect of depression and feelings of hopelessness on coronary heart disease. He noticed that depression and hopelessness weren't random. "I became interested in going deeper, because I thought that there must be something beneath the behaviors that were generating them," Anda said.

Kaiser Permanente in San Diego was a perfect place to do a mega-study. More than 50,000 members came through the Department of Preventive Medicine each year and filled out a detailed biopsychosocial medical questionnaire. Adding another set of questions could be done. Felitti and Anda asked 26,000 people who came through the department "if they would be interested in helping us understand how childhood events might affect adult health," Felitti said. Of those, 17,421 agreed.

Before they added the new questions, Anda spent a year poring through the research literature, focusing on the eight major types of trauma mentioned so often in Felitti's original study and whose individual consequences were described. These eight included three types of abuse — sexual, verbal and physical. And five types of family dysfunction — a parent suffering addiction or mental illness, a mother who's a domestic violence victim, family member incarceration, a loss of a parent through divorce or abandonment. He later added emotional and physical neglect, for a total of 10 types of adverse childhood experiences, or ACEs.

The participants were followed for more than 15 years.

When the first results came in, Anda was at home in Atlanta. He logged into his computer to look at the findings. He was stunned. "I wept," he says. "I saw how much people had suffered and I wept."

This was the first time that researchers had looked at the effects of multiple types of trauma, rather than the consequences of just one. What the data has revealed is mind-boggling.

1. Childhood trauma is extraordinarily common. Nearly two-thirds of the 17,000 mostly white, college educated, people with jobs and great health care had at least one ACE. Twelve percent had four or more.
2. There's an unmistakable link between adverse experiences in childhood and adult chronic diseases, mental illness, perpetrating violence and being a victim of violence.
3. The more types of childhood adversity, the more dire the consequences. Compared to people with an ACE score of zero, people with an ACE score of four are twice as likely to smoke, 12 times more likely to have attempted suicide, seven times more likely to be alcoholic, and 10 times more likely to have injected street drugs. People with high ACE scores are more likely to be violent, to have more marriages, more broken bones, more drug prescriptions, more depression, more autoimmune diseases and more work absences. Without intervention, those with six or more ACEs experience shorter lives by an average of 20 years.

4. ACEs contribute to most of the nation's major chronic health, mental health, economic health and social health issues.

Since the original ACE study, other organizations — including pediatric clinics, social service agencies, cities and states — have integrated ACE surveys. In some cases other types of ACEs were included: experiencing racism, witnessing violence outside the home, bullying and involvement with the foster care system.

— Jane Ellen Stevens is founder and publisher of ACEs Connection Network, comprising the news site ACEsTooHigh.com, and its accompanying social network, ACEsConnection.com.

Jane Ellen Stevens: Childhood trauma is focus of research, programs
Gainesville Sun, The (FL) - March 29, 2017 Browse Issues

Author/Byline: Jane Ellen Stevens Special to The Sun Section: Opinion

The first two parts of this series covered the groundbreaking study of adverse childhood experiences (ACEs) by Kaiser Permanente and the U.S. Centers for Disease Control and Prevention, which revealed that:

— Nearly two-thirds of us have at least one ACE. Twelve percent have four or more.

— ACEs lead to adult onset of chronic disease, mental illness, violence and being a victim of violence.

— The more ACEs, the more severe the consequences. People with high ACE scores have more broken bones, more marriages, more unwanted pregnancies, more prescription or illicit drug use, more obesity, more alcoholism.

— ACEs contribute to most of our major chronic health, mental health, economic health and social health issues.

This raises the questions: How do ACEs have such long-term effects? And what are people doing about it? The study of ACEs is just one of five research areas in ACEs science, which address both questions.

Basically, ACEs cause toxic stress, which damages the function and structure of children's developing brains. Not all stress is bad; we all need positive (non-toxic) stress to thrive. Tolerable stress is temporary, and children are helped to recover by supportive adults and community.

Toxic stress is extreme, persistent and results in chronic release of stress hormones. Kids who experience toxic stress don't have an adequate support system to help them recover.

This long-term toxic stress could come from living with a physically and verbally abusive alcoholic parent, for example. Or toxic stress results from persistent circumstances not included in the original ACEs study — racism, bullying and being homeless — that can also flood the brain with stress hormones without relief.

Kids with an overload of stress hormones survive in fight, flight or freeze mode. They can't focus. They can't sit still or they withdraw. When they're in survival brain, their thinking brain is offline. Without their thinking brain, they can't learn. If their behavior is disruptive, their schools respond by suspending or expelling them, which further traumatizes them.

When they get older, they cope by drinking, overeating, doing drugs, smoking or even over-achieving or engaging in thrill sports. They don't regard these coping methods as problems. Consciously or unconsciously, they use these methods to blunt their depression, anxiety, anger, fear and shame. Nicotine reduces anxiety. Food soothes. Some drugs are uppers, some drugs are downers; whatever feels best is used.

Overloading the body with stress hormones adds wear and tear to the body by interfering with normal inflammation. So even if people with high ACE scores haven't smoked or become obese, for example, they are at increased risk of heart disease, diabetes and autoimmune diseases.

Toxic stress can turn some genes on and off, and sometimes abnormal stress responses can be passed from parent to child. This is sometimes referred to as historical or intergenerational trauma.

With all this bad news about how trauma harms us, there's good news: Our brains are plastic. Our bodies want to heal. Resilience can be developed at any age.

We can heal ourselves by retraining our brain stress response. Practicing mindfulness or yoga; getting enough exercise, adequate sleep, and nourishing food; having safe relationships, safe housing and someone to ask for help when we need it; and, if necessary, professional

counseling can increase resilience. We can build resilient families by educating parents about their own ACEs to help them understand their own childhoods and to motivate them to prevent ACEs for their kids by helping themselves, and by helping their kids.

The new frontier of resilience research lies in creating communities and systems that prevent childhood adversity and avoid re-traumatizing already traumatized people. And many local and national organizations are doing just that by integrating trauma-informed and resilience-building practices based on ACEs science.

Pediatricians and primary care clinics are assessing patients for ACEs and resilience. Hundreds of schools have integrated trauma-informed practices into classrooms, playgrounds and school policies. Head Start in Kansas City has integrated trauma-informed practices in a program called Head Start Trauma Smart, as has a home-based early childhood program called Child First.

Police departments and baby courts have integrated trauma-informed approaches. Homeless shelters and the faith-based community are integrating practices based on ACEs research. Cities and states are integrating ACE- and trauma-informed practices and resilience-building practices. Gainesville is incorporating understanding of ACEs to reduce juvenile arrests.

In these organizations, agencies and communities, the results of trauma informed approaches are nothing less than astounding: the most hopeless of lives turned around; kids' test scores, grades and graduation rates increasing; and significant reductions in costs of health care, social services and criminal justice. Still, we have a long way to go. Awareness is the first step.

— Jane Ellen Stevens is founder and publisher of ACEs Connection Network, comprising the news site ACEsTooHigh.com and its accompanying social network, ACEsConnection.com.

Jane Ellen Stevens: Schools becoming responsive to trauma
Gainesville Sun, The (FL) - May 3, 2017Browse Issues

Author/Byline: Jane Ellen Stevens / Special to The SunSection: Opinion

Adverse childhood experiences — or ACEs — predispose us to chronic disease and mental illness, and are common in people who perpetrate violence. ACEs cause toxic stress, overloading the body with stress hormones.

Long exposure to these hormones change the function and structure of children's developing brains, affecting their behavior. Chronic stress hormones add wear and tear to the body, increasing risk of heart disease, diabetes and autoimmune diseases and shortening life expectancy.

With all this bad news about how trauma harms us, there's good news: Our brains are plastic. Our bodies want to heal. Resilience can be developed at any age.

This column, the fourth in a series on ACEs, looks at what happens when schools use trauma-responsive and resilience-building practices based on ACEs science. Encouraging results give hope that trauma-responsive communities may effectively address our most intractable problems.

We know how to increase individual resilience: A safe place to live. Safe, caring, and nurturing relationships. Adequate nutrition. Enough sleep. Exercise. Mindfulness. What we're just figuring out is how to create trauma-responsive schools, service organizations and self-healing communities. Here's a story about a high school that used ACEs science to integrate trauma-responsive and resilience-building practices to deal with behavior and academic problems.

In 2010, when Jim Sporleder, principal of Lincoln High School in Walla Walla, Washington, learned about the ACE study and the effects of toxic stress on adolescent brains, he realized he was doing everything wrong when it came to disciplining his students. He guided the school in adopting trauma-responsive practices, so that when a teen threw a chair or yelled at a teacher, the staff didn't suspend or expel the teen, which would have re-traumatized the student. They understood that the behavior indicated the student was experiencing trauma. So, instead of yelling at a kid: "What's wrong with you? Why did you do such a stupid thing?" they asked: "What happened to you? How can we help you?"

Since the average ACE score for the teens at Lincoln is 5.5, students needed someone to listen to the overwhelming troubles they were having at home. Letting teens know that teachers cared about them, teachers referred students for counseling, food or a place to live if they'd been kicked out of their parents' home. Out-of-school suspensions stopped; instead they created an in-school suspension room staffed by a teacher who could counsel the youth and keep the school work going.

Within four years, Lincoln High School's suspensions dropped 90 percent, and they no longer needed to expel students. Student attendance improved, so test scores, grades and graduation rates increased. So did their students' hope for the future. More decided to continue to

education after high school.

This is basically what Lincoln High did differently:

- When students showed symptoms of stress, teachers intervened early to provide help — a quick conversation, a longer chat with a school counselor, or intervention with a nurse practitioner at the school-based health clinic.
- For behavior that required more follow-up, such as not complying with a teacher after numerous requests, teens talked with Sporleder, who asked them to assess where they were in their decision-making ability. Students were asked to characterize their stress as in the green, yellow or red zone. If they're furious, for example, they're in the red zone, and are unable to think clearly. Red zone situations call for a day to cool down and think about things before a student can consider how to handle future situations differently.
- In staff meetings, conversations switched from how to discipline students to how to help them and their families.

Through these practices, the staff, students and teachers all felt safer, and everyone was calmer. The teachers framed their work in values of hope, teamwork, a healthy school family, compassion and respect. They had more conversations with the teens because they asked how they were doing more often. Safe, caring and nurturing relationships developed. Students responded to the respect and kindness. Because of all this, more learning took place.

Today, several hundred schools across the U.S. are in the process of becoming trauma-responsive. In Alachua County Public Schools, for example, the System of Care program is called upon to address youth and family needs. For more information about what schools are doing, and for resources such as toolkits, books, webinars, etc., go to the "ACEs in Education" group on ACEsConnection.com.

— Jane Ellen Stevens is founder and publisher of ACEs Connection Network, comprising the news site ACEsTooHigh.com and its accompanying social network ACEsConnection.com.

Nancy Hardt and Jane Stevens: Trading addictions for healthy behaviors
Gainesville Sun, The (FL) - August 4, 2017 Browse Issues

Author/Byline: Nancy Hardt / and Jane Stevens / Special to The Sun Section: Opinion

Opioid addiction is a problem for many in Alachua County. The University of Florida's Mobile Outreach Clinic had frequent requests for drugs when it was first started, but policy did not allow prescribing drugs known for abuse.

Understanding that addiction is a real medical condition, UF psychologist Carol Lewis developed a tool to help patients address their distress through daily healthy behaviors. Patients are asked to sleep 7-9 hours, exercise 20-30 minutes, eat something nutritious three times, do five minutes of deep breathing, do something pleasurable and adopt a mindfulness practice.

It turns out that Dr. Daniel Sumrock, a family physician and director of the Center for Addiction Sciences at the University of Tennessee, calls opioid addiction an unhealthy ritualized compulsive comfort-seeking behavior. His clinics in rural Tennessee and Memphis includes an approach like the Mobile Clinic uses: encouraging patients to adopt healthy comfort-seeking behaviors.

Importantly, he finds that the solution to changing the comfort-seeking behavior of opioid addiction is to address a person's adverse childhood experiences (ACEs) individually and in group therapy. Indeed, the clinic treats people with respect, provides medication assistance if needed and helps them find a comfort-seeking behavior that won't kill them or put them in jail. He finds this approach also useful when dealing with addictions to alcohol, food, sex, gambling, etc.

ACEs are the types of childhood trauma known to increase risk of health and social problems later in life, as a groundbreaking study by Kaiser Permanente and the U.S. Centers for Disease Control and Prevention found. The traumas include physical, emotional and sexual abuse; physical and emotional neglect; living with a family member mentally ill or addicted to alcohol or other substances; experiencing parental divorce or separation; having an incarcerated family member; and witnessing a mother being abused.

The study found that the higher someone's ACE score — the more types of childhood adversity a person experienced — the higher their risk of chronic disease, mental illness including addiction, perpetrating violence, being a victim of violence and other consequences. For example, an ACE score of four nearly doubles the risk of heart disease and cancer, increases the likelihood of becoming an alcoholic by 700 percent and the risk of attempted suicide by 1,200 percent.

High ACE scores are also associated with other addictions besides alcohol. Compared with people who have zero ACEs, people with ACEs two to four times more likely to use alcohol or other drugs and to start using drugs at an earlier age. People with an ACE score of five or more are

higher are seven to 10 times more likely to use illegal drugs, report addiction and inject illegal drugs. Research shows that the brain associated with ACEs can increase vulnerability to addiction, especially when exposure to addictive substances occurs during adolescence.

In other words, to deal with the anxiety, depression, hopelessness, fear, anger and/or frustration associated with the trauma experienced as children, people with ACEs are more likely to resort to unhealthy ritualized compulsive behaviors.

Sumrok's approach shows respect and empathy for patients with addiction, as he explains that their coping behavior was adopted in the absence of healthy alternatives. He explains to his patients the science of ACEs and how their addictions are almost a predictable result of their childhood trauma.

His approach is significant because he helps his patients get at the root of why they're addicted. Policies that focus on just one addiction don't work. If people don't understand why they use opioids or alcohol or cigarettes, or all three, they will move on to another, more easily accessible drug when the current drug they're using becomes more difficult to find.

Sumrok's patients participate in group therapy where talking with others helps each person normalize their own experiences. The group helps each other find ritualized compulsive comfort-seeking behaviors that won't kill them or put them in jail, such as coaching their kid's soccer team or volunteering at a food bank. (Sumrok often quotes Forrest Gump: "Helping helps the helper."). Like Carol Lewis, he also encourages them to integrate other behaviors into their lives, such as walking 30 minutes a day or other exercise, joining a 12-step group or finding a path to encourage a spiritual awakening.

Dr. Nancy Hardt is a professor emerita in the University of Florida College of Medicine who launched the Mobile Outreach Clinic. Jane Stevens is founder and publisher of ACEs Connection Network, comprising the news site ACEsTooHigh.com and its accompanying social network ACEsConnection.com.

Nancy Hardt and Jane Stevens: Consider trauma in providing services
Gainesville Sun, The (FL) - November 28, 2017Browse Issues

Author/Byline: Nancy Hardt / and Jane Stevens / Special to The SunSection: Opinion

In earlier columns in this series, we described adverse childhood experiences, or ACEs, as early life events that change brain structure and function, but can be healed by the presence of nurturing adults and the development of resilience skills. In the absence of safe, stable and nurturing relationships, health and social outcomes can be negatively affected not only in childhood, but also in adulthood.

Communities and service providers, now understanding the long-term impact of ACEs on well being, are taking a hard look at their provision of services to address trauma. What improvements to the usual and customary provision of services need to be made?

Because ACEs are bad, sad or scary events beyond one's control with long-term behavioral impact, encounters with authority figures (such as teachers, health professionals, law enforcement and other service providers) can cause flashback memories to adverse events and can be associated with "freezing" of emotions or violent outbursts. Even well-meaning authority figures may react by imposing even more control, only making the situation worse.

To improve effectiveness, providers of services to traumatized individuals will avoid repeating the sensation of loss of control. This is done by providing clients with choices and employing non-judgmental service providers who are comfortable giving up some control to their clients.

An excellent example of ACEs-informed service provision in our community is the Mobile Outreach Clinic. In that clinic, patients walk in on a convenient day for them. Services are offered in neighborhoods free of charge to avoid cost and transportation barriers.

Patients have a choice of the service to be provided, and can choose who they want to accompany them. Service providers are selected for their ability to be non-judgmental and, by example, they teach health professions students these behaviors.

Indeed there are challenges. Because providing services in such an environment transfers control from the provider to the client, strategies to avoid burnout of valued staff are important. Not all service providers are temperamentally suited to this care setting. Indeed, service providers with their own early adversities may find it difficult and exhausting to give up so much control.

Trauma-informed service organizations must take measures to preserve their valued providers. The Mobile Clinic uses flexible scheduling for providers and support for routine tasks (such as scribing the first draft of clinic notes and follow-up phone calls). This allows providers to focus on creating professionally satisfying, nurturing relationships with patients. Partnerships are fostered and valued by the clinic, so that challenges of caring for this vulnerable population on a shoestring budget are shared across the community.

In turn, providers and students regain some control by providing valued input into clinic policies and procedures, fostering continuous improvement to meet the needs of patients.

Organizations who wish to be more ACEs or trauma informed need to ask themselves these questions: Are clients able to get services at times and in locations they choose? Are they given choices as to which services will be provided? Can they be accompanied by a support person?

Are service providers respectful of the culture, language spoken by, and literacy level of their clients? Are providers aware and understanding of transportation and financial challenges their clients face?

Are staff aware of ACEs, the brain science of ACEs and the impacts of ACEs on behavior? Does the organization address ACEs of staff, and take opportunities to foster resilience in them?

Transforming services from provider-centered to client-centered cannot happen overnight. Starting the conversation with ACEs education for leadership and valued employees is a worthwhile first step. For resources, visit ACEsConnection.com. For an educational program designed to meet your needs, contact Peace4Gainesville (www.peace4gainesville.org).

Dr. Nancy Hardt is a professor emerita in the University of Florida College of Medicine who launched the Mobile Outreach Clinic. Jane Stevens is founder and publisher of the ACEs Connection Network.

Jane Stevens: Jailing or firing harassers won't solve problem
Gainesville Sun, The (FL) - February 8, 2018Browse Issues

Author/Byline: Jane Stevens / Special to The SunSection: Opinion

So, Harvey Weinstein has gone to ground, along with Charlie Rose, Matt Lauer, Kevin Spacey and federal Appeals Court Judge Alex Kosinski, who retired after 15 women accused him of sexual misconduct. Do a search for "sexual harassment" and stories about dozens of men across a variety of professions appear.

Sexual harassment is everywhere — all professions, including higher education and automobile assembly plants. The U.S. Equal Employment Opportunity Commission says that 60 percent of women report having experienced sexual harassment. That's 45 million women. A much smaller, but still in the millions, number of men have been sexually harassed by their male or female bosses.

The solutions so far — Fire them! Jail them! Destroy them! — might garner headlines and short-term satisfaction. The solutions certainly fit our traditional approach of using blame, shame and punishment to attempt to change human behavior.

But we can't fire or imprison our way out of this — it's too big and too complex. Here's why: Assuming a one-to-20 ratio between harasser and victims, 2 million men have sexually harassed others.

Sure, we could fire them all. But we can't throw them all in jail. We've already learned that we can't incarcerate our way out of our opioid problem, and we can't expel or suspend our way out of school behavior problems.

If we don't get to the common roots of these problems, we'll just keep growing children into adults who harm others by violence, bullying or sexual abuse.

That's because all of these problems have the same roots: ACEs, which stands for adverse childhood experiences.

ACEs comes from the Centers for Disease Control and Prevention-Kaiser Permanente Adverse Childhood Experiences study (ACE study), groundbreaking research that looked at how 10 types of childhood trauma affect long-term health.

They include physical, emotional and sexual abuse; physical and emotional neglect; living with a family member with an addiction or a mental illness, such as depression; experiencing parental divorce or separation; having an incarcerated family member; and witnessing a mother being abused.

Subsequent ACE surveys include racism, witnessing violence outside the home, bullying, spanking, losing a parent to deportation and living in an unsafe neighborhood.

Thirty-eight percent of children in every state have at least one ACE, according to a recent Johns Hopkins analysis. That's 34 million children. Many of those children will accumulate more ACEs. Some will grow up to harm others or themselves. Many will do both.

ACEs science — besides the survey itself — also includes how toxic stress from ACEs damages children's developing brains and how it affects adult brains; how toxic stress from ACEs affects health; and how it affects our genes and is passed from one generation to another (epigenetics).

Most important for addressing the crisis is resilience research, which shows the brain is plastic and the body wants to heal.

Resilience research demonstrates positive changes in behavior are possible when individuals, organizations and systems integrate trauma-informed and resilience-building practices — for example, in education and in the family court system.

We could continue our Whac-a-Mole approach to workplace issues: One program to go after sexual harassment, another to stop bullying, another to address absenteeism, with a combination of training and punishment. And we all know how well that works.

Or we could address them all at once with a comprehensive ACEs science approach. This would mean changing our culture by integrating into every organization in every community the trauma-informed and resilience-building practices and policies, based on ACEs science, to create environments that no longer traumatize people.

This means moving from a blame, shame and punishment culture, to a ubiquitous culture of understanding, nurturing and helping people heal themselves.

Jane Stevens is founder and publisher of the ACEs Connection Network and editor of ACEsTooHigh.

On Tue, Oct 15, 2019 at 8:28 AM Crabbe, Nathan <nathan.crabbe@gvillesun.com> wrote:

Yes -- give me some time and I'll get back with you.

Thanks,

Nathan Crabbe

On Mon, Oct 14, 2019 at 10:23 PM Nancy Hardt <nhardt@gmail.com> wrote:

Hi, Nathan,

I am trying to locate the copies of the ACEs series we did with Jane Stevens. My login and password for my digital subscription is being rejected. Can you help find them? It was in late 2017-early 2018.

Nancy Hardt 352-514-3991

--

Nathan Crabbe
Opinion and engagement editor
Gainesville Sun
2700 SW 13th St. Gainesville, FL 32608
352-374-5075
www.gainesville.com

--

Nathan Crabbe
Opinion and engagement editor
Gainesville Sun
2700 SW 13th St. Gainesville, FL 32608
352-374-5075
www.gainesville.com

This message may contain confidential and/or privileged information. If you are not the intended recipient or authorized to receive this for the intended recipient, you must not use, copy, disclose or take any action based on this message or any information herein. If you have received this message in error, please advise the sender immediately by sending a reply e-mail and delete this message. Thank you for your cooperation.