



May 14-16, 2025
Council Meeting

Florida Hotel & Conference Center Orlando

1500 Sand Lake Rd, Orlando, FL 32809

OUR MISSION

“To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities”.

For more information or questions, contact
Kristen Conlin, kristenc@fddc.org or 850-488-4180

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**State Plan
Committee**

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Public Policy

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Finance

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Full Council

FLORIDA DEVELOPMENTAL DISABILITIES COUNCIL, INC.

COUNCIL MEETING SCHEDULE

Wednesday May 14, Thursday May 15 & Friday May 16, 2025

**Florida Hotel and Conference Center
1500 Sand Lake Road
Orlando, Florida 32809
(407) 859-1500**

Wednesday May 14th

| | | |
|----------------------------|--|----------------------------------|
| 6:30 p.m.-7:30 p.m. | Pre-Council Meeting <i>Review of key items in Council book</i> <i>Ideas for Council Member Mentor Program</i> | <i>Facilitated by Chair Hall</i> |
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Thursday May 15th

DAY 1- FULL COUNCIL MEETING

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| 9:30 a.m. | Introduction/Call to Order | <i>Eddie Hall, Chair</i> |
| | Adoption of the Agenda ** | <i>Eddie Hall, Chair</i> |
| 9:45 a.m. | Adoption of the 01/2025 Minutes ** | <i>Eddie Hall, Chair</i> |
| 9:45 a.m.-11:15 a.m. | State Agency/Sister Agency Reports | <i>Eddie Hall, Chair</i> |
| 11:15 a.m.-11:30 a.m. | Break | |
| 11:30 a.m.-11:45 a.m. | Chair/Vice Chair Report | <i>Eddie Hall, Chair</i> |
| 11:45 a.m.-12:00 p.m. | Executive Director Report | <i>Valerie Breen, Ex. Dir.</i> |
| 12:00 p.m. | Working Lunch | <i>Working Lunch</i> |
| 12:15 p.m.-1:15 p.m. | 2025 Legislative Outcomes Report | <i>Margaret Hooper, Dir.</i> <i>Sarah Goldman</i> |
| 1:15 p.m.-1:30 p.m. | Break | |
| 1:30 p.m.-2:45 p.m. | FDDC Key Projects/Outcomes | <i>Program Team</i> |
| 2:45 p.m.-3:00 p.m. | Break | |
| 3:00 p.m.-4:30 p.m. | Standing Committee Recommendations for Council Discussion and Vote* <i>State Plan</i> <i>Public Policy</i> <i>Finance</i> <i>Executive</i> | <i>Eddie Hall, Chair</i> <i>Jean Sherman, Chair</i> <i>Sarah Goldman, Chair</i> <i>Dennis Hart, Chair</i> <i>Eddie Hall, Chair</i> |
| 4:30 p.m. | Any New Business Public Comment | <i>Eddie Hall, Chair</i> <i>Eddie Hall, Chair</i> |

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|----------------------------|---------------------------------|--|
| 4:30 p.m. | Meeting Adjourned | <i>Eddie Hall, Chair</i> |
| 6:00 p.m.-7:00 p.m. | Mandatory Council Dinner | <i>Provided by FDDC WellFlorida Opener</i> |

Friday May 16th

DAY 2- FULL COUNCIL MEETING

| | | |
|------------------------------|----------------------------------|----------------------------------|
| 8:30 a.m. | Introductions/Roll Call | <i>Eddie Hall, Chair</i> |
| 8:45 a.m.-10:30 a.m. | Strategic Planning | <i>WellFlorida Council, Inc.</i> |
| 10:30 a.m.-11:00 a.m. | Break- Check out of hotel | |
| 11:00 a.m.-1:30 p.m. | Strategic Planning | <i>WellFlorida Council, Inc.</i> |
| 12:00 p.m. | Working Lunch | |
| 1:30 p.m. | Public Comment | <i>Eddie Hall, Chair</i> |
| 1:30 p.m. | Next Council Meeting | <i>Eddie Hall, Chair</i> |
| 1:30 p.m. | Meeting Adjourned | <i>Eddie Hall, Chair</i> |

Florida Developmental Disabilities Council, Inc.

STATE PLAN COMMITTEE MEETING

AGENDA

Tuesday, April 29, 2025

3:00 pm–4:30 pm

Zoom meeting

OUR MISSION

“To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities.”

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|--------------------------|--|--|
| 3:00 pm | Call to Order and Roll Call | <i>Dr. Jean Sherman, Chair</i> |
| | Adoption of the Agenda ** | <i>Dr. Jean Sherman, Chair</i> |
| 3:05 pm | Approval of Minutes (A) Minutes from 01/30/25** | <i>Dr. Jean Sherman, Chair</i> |
| 3:05 pm – 3:15 pm | Updates on Contracts & Bids | <i>Dr. Sue Kabot, Chief of Programs and Research</i> |
| 3:15 pm – 3:25 pm | Program Updates | <i>Dr. Jean Sherman, Chair</i> |
| | A. Review Minutes Access to Services <ul style="list-style-type: none">○ Approved Minutes○ Draft Minutes 4/15/25 Home- and Community-Based Services (HCBS) <ul style="list-style-type: none">○ Approved Minutes 12/5/24○ Draft Minutes 4/3/25 Aging Caregivers <ul style="list-style-type: none">○ Approved Minutes 12/10/24○ Draft Minutes 4/10/25 Self-Advocacy Leadership <ul style="list-style-type: none">○ Approved Minutes 11/10/24○ Draft Minutes 4/2/25 | |
| | B. Review State Plan Highlights (B) State Plan Project Updates | |
| 3:25 pm – 3:55 pm | Discussion of Projects Presenting Challenges | |
| | A. Strive to Thrive B. Delivery Planning for PIP Alternate Curriculum | <i>Dr. Christine Reeve Kristin Vandagriff</i> |
| 3:55 pm –4:25 pm | Sustainability Planning for All Projects | <i>Dr. Sue Kabot, Chief of Programs and Research</i> |

4:25 pm – 4:30 pm

Public Comment/Meeting Adjourned

Dr. Jean Sherman, Chair

*** Requires vote*

Florida Developmental Disabilities Council (FDDC)

State Plan Committee Meeting Minutes

Thursday, January 30, 2025

In-Person

Florida Hotel & Conference Center, Orlando, Florida

Committee members present: Jean Sherman (Chair), Beth Boone, Sarah Goldman, Elly Hagen, Yolanda Herrera, Danielle McGill, Carla Mercer, Kali Wilson

Committee members absent: Dennis Hart

Council members present: Jean Sherman (Chair), Beth Boone, Sarah Goldman, Elly Hagen, Yolanda Herrera, Danielle McGill, Carla Mercer, Kali Wilson, Arizona Jenkins, Enrique Escallon, Danielle McGill, Beth Boone, Susan Nipper, Caitlyn Clibbon, Kira Hoag, Kim Quinn, Lauren Modawell, Michael Sayih, Johana Valdivieso,

Staff present: Susan Kabot, Jamie Mayersohn, Christine Reeve, Jennifer Chung, Sarah, Macaluso, Monica Moye, Valerie Breen, Margaret Hooper, Kristin Vandergriff

Guests present: Amy Deaville

Sherman called the meeting to order at 10:45. Roll call was conducted and quorum established.

I. Approval of Agenda

Action Taken: Goldman made a motion to adopt the agenda as presented. Mercer seconded. Motion passed unanimously.

II. Approval of Minutes

Action Taken: Boone made a motion to adopt the minutes as presented. Hagen seconded. Motion passed unanimously. Draft minutes from the 09/19/24 State Plan Committee meeting were presented.

III. Review of Task Force Minutes and Current Status of Projects Chart

Council members were directed to pages 12–33 of their Meeting book to review all Task Force Meeting minutes that occurred since the September meeting. Council members were directed to pages 34–48 to review the Project Status Update Chart. There were no questions or discussions.

IV. Recommendations to the Full Council for Consideration in Project Continuation

The Mentimeter app was used to gather input from the State Plan Committee and other attendant Council members regarding Task Force recommendations for the continuation of current Council activities into the next State Plan. These recommendations were made based on

the status projected for the end of Year 5 of the current State Plan and whether the project was incomplete and needed additional time to reach completion. The other consideration was whether the topic was so critical that some activity would need to continue that was not yet designed.

The following are the recommendations made during the State Plan meeting to the full Council on January 31, 2025.

Access to Services: Research Project

Strongly Agree 7; Agree 6; Neutral 1; Disagree 0; Strongly Disagree 0

Discussion primarily agreed with the task force to not continue the project as additional research was not needed.

Access to Services: Translating Research to Practice

Strongly Agree 7; Agree 8; Neutral 1; Disagree 0; Strongly Disagree 0

Discussion included concerns about who would house the online tool, assuring that the activity is not duplicative from other systems that may exist, and concerns that the tool will not be implemented if it is not continued.

Home- and Community-Based Services: Best Practices in Case Management

Strongly Agree 5; Agree 7; Neutral 2; Disagree 1; Strongly Disagree 2

Several members felt it was a very important project that needed to be continued. Key points of discussion included gaining a better understanding of the tool and how it could be used, whether it would be attractive to families or caregivers who don't know what case managers are, and how it will be sustainable after one year of continuing.

Home- and Community-Based Services: Researching Provider Solutions

Strongly Agree 2; Agree 4; Neutral 1; Disagree 5; Strongly Disagree 5

Many members noted that it was a critical or important issue that needed to be addressed. Concerns revolved around getting enough support from agencies to implement.

Home- and Community-Based Services: Measuring Service Quality

Strongly Agree 4; Agree 10; Neutral 2; Disagree 0; Strongly Disagree 0

The discussion involved agreeing that self-advocates were included in this project and concerns that it measures that individuals can visit the program at any time to use the tool.

Home- and Community-Based Services: Addressing the Behavior Therapist Shortage

Strongly Agree 11; Agree 5; Neutral 0; Disagree 0; Strongly Disagree 1

The discussion and comments focused on continuing the project and recognizing its importance.

Home- and Community-Based Services: Dual Diagnosis Training

Strongly Agree 6; Agree 4; Neutral 2; Disagree 0; Strongly Disagree 0

Discussion focused on the importance of this topic due to the large numbers of individuals with I/DD it impacts. There were some concerns regarding whether it was a feasible project because agencies tend to work in silos. A suggestion was made to approach it within each organization. It was noted that many agencies have come to the table to have discussion on this area.

Home- and Community-Based Services: First Responders Training

Strongly Agree 12; Agree 0; Neutral 0; Disagree 0; Strongly Disagree 0

Discussion focused on the importance of this project, and that it needed to continue.

Aging Caregivers: Researching Aging Caregivers: Strive to Thrive (ends May 2025)

Strongly Agree 11; Agree 3; Neutral 0; Disagree 0; Strongly Disagree 0

Significant discussion regarding this project and the need to move from research to action. Some members noted the importance of research to go beyond understanding barriers to identifying ways that aging caregivers thrive. Other members noted that they felt that the reasons some caregivers thrive is already known and action needs to be taken sooner for aging caregivers. Others suggested meetings between the Council Executive Director and the President of the Association of Area Agencies on Aging to help continue to bridge that gap.

Aging Caregivers: Aging Generations Expectations in DD in Florida (AGEDD)

Strongly Agree 4; Agree 3; Neutral 3; Disagree 0; Strongly Disagree 1

Discussion revolved around the importance that this area of need is growing and has very limited resources. Focus on making sure the family / caregiver perspective is included as part of the planned summit.

Self-Advocacy Leadership: Partners in Policymaking Coordinator

Strongly Agree 12; Agree 3; Neutral 0; Disagree 0; Strongly Disagree 0

Comments were mostly that the program must continue.

Self-Advocacy Leadership: Partners in Policymaking Curriculum

Strongly Agree 9; Agree 5; Neutral 0; Disagree 0; Strongly Disagree 0

Discussion focused on the need to move forward and eventually integrate this project with the PIP program. However, it was noted that they are different levels because Easy Read is only created for Module 1 while the PIP group is currently working on Module 6. Several commenters noted the importance of the Easy Read Curriculum for everyone to be able to participate.

Self-Advocacy Leadership: Florida SAND Fellows Leadership Program

Strongly Agree 10; Agree 5; Neutral 0; Disagree 0; Strongly Disagree 0

The comments were all positive.

V. Public Comment and Adjournment

There was no public comment.

Sherman adjourned the meeting at 1:00 p.m.

Florida Developmental Disabilities Council, Inc.

STATE PLAN COMMITTEE MINUTES

April 29, 2025

VIA ZOOM

Committee members present: Jean Sherman, Beth Boone, Yolanda Herrera, Carla Mercer, Kali Wilson

Committee members absent: Sarah Goldman, Elly Hagen, Dennis Hart, Danielle McGill

Council members present: Arizona Jenkins

Staff present: Susan Kabot, Valerie Breen, Chris Reeve, Jennifer Chung, Margaret Hooper, Kristin Vandagriff

Guests present: None

Quorum was established. Sherman called the meeting to order at 3:07 p.m.

I. ITEMS ADOPTED BY COMMITTEE

Action Taken: Wilson made a motion to adopt the agenda as presented. Mercer seconded. Motion passed unanimously.

Action taken: Boone made a motion to adopt the January 30, 2025 minutes as presented. Wilson seconded. Motion passed unanimously.

II. RECOMMENDATIONS FOR FULL COUNCIL VOTE

There were no recommendations.

III. PUBLIC COMMENT

There was no public comment

Key points being made during committee discussion:

Strive to Thrive: Many suggestions were made as to additional distribution channels for the survey for this project. The target is 300 completed surveys. Some of the ideas included Family Network on Disabilities, resending the survey through FDDC listserve and PIP graduate list, ARC of Florida, Special Olympics, and FL SAND parents.

Alternate PIP Curriculum: Module 1 of the alternate PIP curriculum was shared with the group and feedback was obtained about both the curriculum and ideas for delivering the curriculum. The meeting attendees shared positive feedback about the curriculum itself. Several ideas were shared regarding who should be the people supporting the participants in the alternate curriculum (e.g., parents, past PIP graduates, Florida SAND Fellows). One member asked about modifications to the alternate curriculum for individuals who were more cognitively limited.

The ideas of dissemination and sustainability were introduced to the group, but due to limited time, were not fully discussed. This topic will be addressed in the future as the Council members see what projects will not be included in the next state plan that may benefit from legislative or state agency support.

Sherman adjourned the meeting at 4:15 p.m.

DRAFT



**Access to Services Through Knowledge (ASK)
Task Force Meeting, December 9, 2024, 2:30-4 pm
Minutes**

2:35 pm Call to Order

The meeting was called to order by Beth Boone at 2:35 after providing a few minutes to wait for anyone else attending.

Roll Call and Introductions

Roll call was taken at 2:40. Members introduced themselves, their affiliations and the role/affiliation they were representing in the meeting.

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|----------------|----------------------|--|
| Members | Elly Hagen, Co-Chair | Absent |
| | Beth Boone, Co-Chair | Present – Florida Center for Inclusive Communities |
| | Denise Anderson | Absent |
| | Caitlyn Clibbon | Absent |
| | Patricia Bodiford | Absent |
| | Dennis Hart | Absent |
| | Carla Mercer | Present - Parent |
| | Charlotte Temple | Present – Parent/FDDC Council |
| | Kali Wilson | Absent |
| | Victoria Zepp | Present |
| Staff | Sue Kabot | Present |
| | Chris Reeve | Present |

2:35 pm Approval of October 3, 2024, Minutes **

Minutes were shared but not approved because there were too few members to review. Please see approval at the end of the meeting.

The meeting participants were reminded that the meeting was being recorded.

Research for a Statewide Access to Services Information System – NADD

Access to Services Through Knowledge Translating Research Into Application –
Mathematica, Inc.

Beginning at 2:40 pm, Chris Reeve provided an update on the two components of Goal 1. The first component focuses on research being conducted by the National Association for Dually Diagnosed (NADD). This research has gathered data from caregivers and family members about their experiences accessing services, with an emphasis on understanding which community resources have been the most beneficial

The second component involves Mathematica, which is translating the research findings into actionable tools. These tools include "roadmaps" and "avatars" designed to guide families through different life transitions by providing clear steps and identifying available resources. Mathematica and NADD have worked closely to ensure the data gathered aligns with the practical needs of families. The collaboration has led to a shift in focus from "journey maps," which depict personal experiences, to "roadmaps," which provide actionable guidance at key transition points in life.

Year 5 will mark the conclusion of the research phase and continue the development of tools to translate this research into practical applications. Mathematica will finalize 15 roadmaps and associated avatars by the end of Year 5.

The group engaged in a comprehensive discussion about the challenges of sustainability and the next steps for the project. Participants emphasized the importance of ensuring that the tool provides more than just a list of resources, as families need actionable, detailed guidance to navigate complex systems.

Questions were raised about the potential housing and long-term maintenance of the project. There was also significant concern about ensuring the tool remains up-to-date and useful over time.

Comments and consensus were recorded on the planning form for both the ASK Research project and the ASK Translating Research (Roadmaps/Avatars) project.

Members expressed strong support for continuing the project but emphasized the need to transition from research to implementation. The task force agreed that the Research Project does not need to continue, while the Translating Research project should continue but needs more information moving forward in terms of sustaining the tool.

3:35 pm Next Steps

Next steps for the Mathematica project were discussed and recorded in the planning form. Information about the process for gathering information for the development of the next 5-Year State Plan was reviewed.

Public Input

At 3:40, Beth asked for any public input. There was none.

Revisiting Review of Minutes

With Victoria joining, we revisited the approval of the October 3, 2024 minutes. Victoria made a motion to approve the minutes. Carla seconded the motion. The vote unanimously approved the minutes.

3:45 pm Adjournment

The meeting was adjourned by Beth Boone at 3:45 pm.



**Access to Services Through Knowledge (ASK)
Task Force Meeting, April 15, 2025, 3:00-4:30 pm
Minutes**

Call to Order

Elly Hagen, Chair

At 3:05 p.m. Elly Hagen, Chair, called the meeting to order.

Roll Call and Introductions

Elly Hagen, Chair

Elly asked Chris Reeve to complete the roll call.

Present Members: Elly Hagen Beth Boone, Caitlyn Clibbon, Carla Mercer, Charlotte Temple

Absent Members: Denise Anderson, Dennis Hart, Kali Wilson, Victoria Zepp

Resource Members: *Danny Armstrong--absent*

Staff: *Chris Reeve, Susan Kabot*

Guests: *Project staff from NADD and Mathematica presenting on the ASK Projects*

****Approval April 25, 2025, Agenda**

Elly reminded members that the agenda was shared with them in an earlier email and to please review it. She asked if any changes were needed. No one responded. She asked for a motion to approve the agenda. The motion was made by Charlotte Temple, and Beth Boone seconded the motion. At 3:09 the agenda was approved.

****Approval of December 9, 2024, Minutes**

Elly asked Chris to put the December 9, 2024, minutes on the screen. After giving time for review, Elly asked if changes were needed. None were noted. She asked for a motion to approve the minutes, and Beth Boone made a motion. Caitlynn Clibbon seconded the motion. And the minutes were approved at 3:12.

Presentation on Research Design for 2025 for ASK

NADD

Chris introduced Jeanne Farr, the CEO from the National Association for the Dually Diagnosed (NADD). Jeanne shared an overview of their role in the ASK project this year. Their focus is on conducting research to support Mathematica's roadmaps and avatars. They began collecting data in March.

Kristin McGill, project manager, described her experiences in exhibiting and presenting at the virtual Autism in Black conference on April 11. She scheduled several focus group sessions from the conference, and she had 10 participants sign up during the session. They plan to participate again next year with several other public engagements set up over the next few months.

Data collection thus far included eight interviews scheduled, two focus groups scheduled or in progress, and one focus group and two interviews completed.

NADD will also be completing an Environmental Scan of current research relevant to project goals.

Presentation on Roadmaps and Avatars

Mathematica

Chris Reeve introduced Diane Beaver, who is presenting for Mathematica. She asked the Mathematica team to introduce themselves, including Claire Pendergrast, Rik Ghosh, and Yuri Feliciano. Their focus is on how to translate the research from NADD tools that are useful for locating and accessing services.

Tasks for this year are to design 15 roadmaps representing ways to go through the different stages and services needed throughout the life of individuals with I/DD and their families/caregivers. And they are creating 15 avatars representing stages of life, common characteristics, and goals and challenges they face.

Diane reviewed the reason for shifting from journey maps to roadmaps (i.e., because they aren't organized by life stage but are tagged with life stages). And she described the shift from personas to avatars (i.e., research with listening sessions and content committee showed people didn't want to hear about pain points or other characteristics of what they were living).

Mathematica are currently doing listening sessions to determine what works for the roadmaps/avatars. And they will use NADD's data to determine how people's experiences align or do not align with the effective way to go through a path (e.g., seeking guardianship).

Diane reviewed the 5 avatars they outlined thus far. Ric Ghosh then shared how it might look as a web application. Based on feedback from the Content Advisory, they are leaning from calling them avatars to "caregiver examples." Ric shared avatar examples that each included what roadmaps they are using at the stage in which they live.

Diane outlined the next steps including what they will be working toward in June. And then she opened the floor to questions.

Questions / Discussion

Beth Boone commented that she thinks that the metamorphosis of the project has helped her see its utility and that of the ultimate platform. It keeps things simple. And she cautioned the team to keep the language simple and plain as well.

She shared that, in the past, CARD had a resource system but cautions that we need to be careful that we have a system for keeping the resources, steps etc. up to date. Diane shared a resource called Find Help that houses relevant resources. You can code things on the back end to automatically update resources to avoid having to have people to do this. She also suggested that for the resources we include in the beginning, we stay at a high level (e.g., state resources) to avoid systems being out of date.

Sue Kabot asked whether the guardianship roadmap was correct because it started with asking if the family had a will rather than beginning when a child was turning 18. Diane indicated that this brought up the question of whether every roadmap must start at a specific point. Instead, the avatars may lead to different parts of the roadmap itself.

Sue also asked if the avatars should be broader (e.g., single parent instead of divorced mom). Diane noted that it will be the point of this and next year's research as well to determine what level is best.

Sue noted that some roadmaps may be linear, and some may not be linear. Diane noted that this is something that is becoming clearer and will be addressed in the coming year.

Public Input

At 4:02 pm, Elly noted there were no members of the public present.

Adjournment

Elly shared information about the upcoming Council meeting date and the date for the next meeting on April 24 at 5 PM with Well Florida.

The meeting was adjourned at 4:03 p.m.



**Home- and Community-Based Services
Task Force Meeting, December 5, 2024, 3:00-5:00 pm
Agenda**

3:00 pm Call to Order *Kali Wilson, Chair*

The meeting was called to order at 3:15.

Roll Call and Introductions *Kali Wilson, Chair*

Roll call was taken at 3:20. Members introduced themselves, their role on the Council, and where they were from. Several members joined after roll call was taken as there was confusion regarding the time the meeting was scheduled for. Because of this, the group waited until 3:30 to begin the discussion of the projects for state plan recommendations for continuation into the next state plan.

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| Members | <i>Kali Wilson</i> | Present |
| | <i>Dennis Hart</i> | Present |
| | <i>Denise Anderson</i> | Present |
| | <i>Tina Cordova</i> | Present |
| | <i>Andrea Gary</i> | Absent |
| | <i>Arizona Jenkins</i> | Absent |
| | <i>Susan Nipper</i> | Anna Cleveland Present—Waiver Policy Coordinator |
| | <i>Jean Sherman</i> | Present |
| Staff | <i>Margaret Hooper</i> | Present |
| | <i>Sue Kabot</i> | Present |
| | <i>Chris Reeve</i> | Present |
| Other Council Members Present | | |
| | Yolanda Herrera | Present |

3:05 pm **Approval of August 13, 2024 Minutes *Kali Wilson, Chair*

Minutes were approved after roll call. Tina Cordova made the motion for approval and Anna Cleveland seconded. One correction was made as “toolkit” on Page 2 was spelled “tooklit” in the original minutes.

3:10 pm Project Review for State Plan Recommendations

*Sue Kabot and Chris
Reeve*

Best Practices in Case Management, Mathematica, Inc.
Researching Provider Solutions, Mathematica, Inc.
Measuring Service Quality, Mathematica, Inc.
Addressing the Behavior Therapist Shortage, University of Florida
Dual Diagnosis Training, National Association for the Dually Diagnosed
Training First Responders, Florida Atlantic University

At 3:30 we began the discussion of the current projects/activities to determine consensus of what projects may need to be continued into the 2027-2031 state plan. Chris Reeve led the discussion of the Behavior Therapist Shortage project. There was robust conversation about this project as the group agreed this is a critical issue. Comments were recorded on the summary sheet. The Case Management project was discussed next and, again, robust conversation ensued. The main points that revolved around this project revolved around marketing this instrument and how to ensure that there is widespread use of this resource. Comments were recorded on the summary sheet. The Researching Provider Solutions project was then discussed. It was determined that implementation would require either policy or legislative changes to make widespread, effective recruitment and retention strategies available. Monitoring was the suggestion for future state-plan needs. The summary sheet was completed.

Measuring Service Quality was discussed next. It was determined that all three instruments would be completed by the end of this state plan, along with training videos. The instrument for providers is expected to be developed in Year 5 too, along with digitization. It was agreed that marketing and monitoring use should continue. The summary sheet was completed. Dual Diagnosis Training was discussed, and it was agreed that marketing and monitoring use would be the major strategies in the next state plan to ensure wider adoption and sustainability. The Council's role to serve as a connector between the provider and adoption of the tools was agreed upon. The summary sheet was completed. First Responder Training was discussed next. Margaret explained the legislative outcome from this past session so there is hope that the mandate for law enforcement training will again be introduced. The goal in the next state plan revolves around marketing and monitoring use. The summary sheet was completed.

4:10 pm Next Steps

Sue Kabot

During the meeting, discussion of the creation of the next state plan and how this information may inform its development took place. The tentative schedule for the January Council meeting in terms of Wednesday was shared.

4:20 pm Public Input

Kali Wilson, Chair

There were no members of the public present.

4:30 pm Adjournment

Kali Wilson, Chair

The meeting was adjourned at 5:15 pm.



**Home- and Community-Based Services
Task Force Meeting, April 3, 2025, 3:15-4:45 pm
Agenda**

3:15 pm Call to Order *Kali Wilson, Chair*

Kali Wilson called the meeting to order at 3:15 pm.

Roll Call and Introductions *Kali Wilson, Chair*

Roll call was taken at 3:15. Below are those present or absent for the meeting.

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|----------------|------------------------|----------------|
| Members | <i>Kali Wilson</i> | <i>Present</i> |
| | <i>Dennis Hart</i> | <i>Present</i> |
| | <i>Denise Anderson</i> | <i>Present</i> |
| | <i>Tina Cordova</i> | <i>Present</i> |
| | <i>Andrea Gary</i> | <i>Present</i> |
| | <i>Arizona Jenkins</i> | <i>Present</i> |
| | <i>Susan Nipper</i> | <i>Absent</i> |
| | <i>Jean Sherman</i> | <i>Present</i> |

| | | |
|--------------|---|----------------|
| Staff | <i>Sue Kabot</i> | <i>Present</i> |
| | <i>Chris Reeve-Addressing the Behavior Therapist Shortage</i> | <i>Present</i> |
| | <i>Jennifer Chung-First Responder Training</i> | <i>Present</i> |

3:15 pm Approval of the April 3, 2025 Agenda *Kali Wilson, Chair*

Dennis Hart made a motion to approve the agenda for April 3, 2025. Jean Sherman seconded the motion. All were in favor.

3:20 pm **Approval of December 5, 2025 Minutes *Kali Wilson, Chair*

Tina Cordova made a motion to approve the draft December 5, 2024 meeting minutes. Jean Sherman seconded the motion. All were in favor.

3:25 pm Project Review *Sue Kabot, Chris
Reeve, Jennifer Chung*

Best Practices in Case Management, Mathematica, Inc.

Sue Kabot demonstrated the two tools from Mathematica that are posted to the FDDC website. The Case Management Guide and the Residential Tool were viewed. Jean shared that it is

important to emphasize the term “support coordinator” because many of our adult constituency are APD clients and know that term. There will be a visual thumb nail of each product on the website with a description and that would be a good place to emphasize that term.

Researching Provider Solutions, Mathematica, Inc.

The research for this project is continuing. Information was shared about the use of FDDC social media and the problem where 700 surveys were submitted in 30 minutes because a \$30.00 gift card was advertised for those who completed the survey. It was fortunate that over 140 complete surveys were submitted before then so they will be analyzed. The target number was 150 so we were able to get close to that number. The focus group will take place soon as recruitment has begun.

Measuring Service Quality, Mathematica, Inc.

The residential tool was shared from the FDDC website. Jean suggested that there be a way for people to see ratings of multiple sites on one instrument. That is planned for the virtual tool. She also asked whether there is a way to upload a picture of the residential setting that goes with the ratings.

Addressing the Behavior Therapist Shortage, University of Florida

Chris shared a sample of the curriculum that the UF/University of Miami provider developed to provide more information about working with people with severe challenging behaviors. A discussion took place about how to adapt this training for natural environments like group homes, family homes, and schools. The university training programs in ABA are receptive to inserting the curriculum into their existing curriculum.

Dual Diagnosis Training, National Association for the Dually Diagnosed

Sue shared a training module developed last year from the National Association for the Dually Diagnosed on Crisis. The curriculum was offered virtually, face-to-face, and on an ILS. They also presented this training as a pre-conference day for the January CARD conference. They are also looking for additional opportunities to add the training to existing training activities. Tina suggested contacting the Autism Society of Florida and provided information about the ICan conference.

Training First Responders, Florida Atlantic University

Jennifer shared the ILS Canvas site for the First Responder Training curriculum. Several task force members asked about how to obtain the curriculum to share with their law enforcement and emergency medical services contacts. Jennifer will hook them up with Torica Exume to find

how to gain access to the curriculum to share with others who may be interested in the train-the-trainer process.

4:25 pm Public Input

Kali Wilson, Chair

There was no public input.

4:30 pm Adjournment

Kali Wilson, Chair

The meeting was adjourned at 4:50 pm.

DRAFT

Aging Caregiver Task Force/State Alliance Team Minutes

December 10, 2024, 2 -3:30 p.m.

Present: Yolanda Herrera, Jean Sherman, Damian Gregory, Elly Hagen, Lauren Modawell, Dèan Gregory-Stewart, and Michael Sayih,

Absent: Danielle McGill, Mary Jo McKay, Arizona Jenkins, Susan Nipper, Kira Houge, Carla Mercer, Darrell Drummond

Agency Representatives: Frank Pate-AHCA, Anna Cleveland-APD, Paige Baker-DOEA

Staff: Jan Pearce, Chris Reeve, and Sue Kabot

The meeting was called to order at 2:03 p.m. by the Chair, Yolanda Herrera.

1. The Chair welcomed all the members and guests. Each person was introduced. Yolanda requested approval of Minutes from the August 9, 2024, Task Force meeting. The minutes were reviewed. Jean Sherman made a motion to approve the minutes as presented. Elly Hagen seconded the motion, and the minutes were unanimously approved.

Program Updates:

2. Jan Pearce shared basic information about preparing for the new five-year state plan, which begins in 2027. Sue Kabot shared the timelines for all the preparations and the final project. The primary focus of the meeting was to review where the projects are currently and to provide recommendations for the future.

Jan Pearce provided an update on Strive to Thrive, Researching Aging Caregivers.

- A literature scan to find gaps related to aging families was completed, and a report on the findings was shared. Additionally, the provider identified and reviewed tools/instruments to develop the project's survey and focus group protocols (survey for aging family caregivers, the interview protocol for adults with IDD, and the focus group protocols for both aging family caregivers and adults with IDD).
- The provider developed the survey and focus group protocols. All tools are available in English and Spanish
- There were seven focus groups held during the year. This includes self-advocate groups as well as caregiver groups.
- They will complete their work in May 2025 with a comprehensive research paper.

Recommendations: Strive to Thrive

A robust discussion was held on work in the future. Multiple people shared that they were concerned about the project length and time before action was taken based on the project outcomes. Several people felt we should work on the existing issues to provide more immediate help to caregivers and struggling individuals. Sue shared that other task forces are working on some of those issues and provided examples.

Update: Aging Generations Expectations in Developmental Disabilities (AGEDD) in Florida. Jan reviewed the current work on the contract. It included:

- The provider continued work in 2024 to build a strong partnership between the I/DD and Aging networks.
- Thirteen Communities of Practice are engaged across the state, representing nineteen counties. Membership includes representatives from the Aging and I/DD networks.
- The provider facilitated individual meetings with state-level leadership from the Agency for Persons with Disabilities, The Agency for Healthcare Administration, and the Department of Elder Affairs. They were updated on the progress of the projects and asked for their continued support.
- Twenty-three individuals received access to services due to the work of the CoPs.

Recommendations:

The Task Force discussed both projects' status and their vision for the future. A common theme of the discussion was the desire for more action based on the work performed. The group's consensus was that aging must remain a priority and recommended that it must continue in some matter. They projected a two-year time limit.

3. The opportunity to participate in the National CoP conference was shared. It is in May in St. Charles, Missouri. Individuals were asked to email if they were interested in representing the Florida DD Council. More information will be shared when received.
4. **Public Input:** There was no public input.
5. **Adjournment:** The meeting was adjourned at 3:36.



Aging Caregivers Task Force and SAT

Task Force Meeting, April 10, 2025, 3:30-5 pm Minutes

3:30 pm Call to Order

The meeting was called to order by the Chair, Yolanda Herrera at 3:32 pm.

Roll Call and Introductions

Yolanda asked Chris Reeve to take roll call. Roll call was taken at 3:33 pm

Members Present Yolanda Herrera, Carla Mercer, Joseph Pate – for Kimberly Quinn (ACHA), Elly Hagen, Arizona Jenkins, Lauren Modawell, Susan Nipper (APD), Jean Sherman, Victoria Zepp

Members Absent Michael Sayih, Kira Houge (Elder Affairs), Danielle McGill

Resource Members Present Jennifer Ross-- for Darrell Drummond (Council on Aging of St. Lucie), Damian P. Gregory, Dèan Gregory-Stewart, Mary Jo McKay

Staff Present Chris Reeve, Sue Kabot, Jennifer Chung

Guests From University of Illinois Chicago– Strive to Thrive
Sumithra Murty. Hope Sparks, Abby Schindler

3:35 pm **Approval of December 10, 2024, Minutes

Yolanda asked Chris to share the minutes on the screen from the last meeting, December 10, 2024. After a few moments to allow review of the minutes, Yolanda asked for a motion to approve the draft minutes. Jean Sherman made a motion to approve the minutes, and Mary Jo McKay seconded the motion. The vote unanimously approved the minutes.

3:40 pm Presentation by University of Illinois – Chicago *Strive to Thrive Project*

Summithra Murthy, Hope Sparks and Abby Schindler shared their progress on the Strive to Thrive project from the University of Illinois – Chicago. They reviewed the purpose and research questions of the project. They also included an update on the data collection.

At this point, they have completed the focus groups in English and Spanish with 22 people with I/DD and 27 aging family caregivers (including the pilot focus groups).

They also shared emerging themes from the focus groups reviewed thus far. These included:

1. The family thrives as a unit. They are supportive of each other, and what helps one person in the family thrive helps all of them thrive.
2. Formal supports (e.g., Vocational Rehabilitation; HCBS Waivers), including the ability to both access and navigate the systems, are key to helping families thrive.
3. Access to meaningful employment for people with IDD helps the whole family to thrive.

The research group also reported on the online survey for the project. Survey distribution began in February 2025 and was paused in March 2025 to address some feedback from the FDDC. Those changes were made, and the survey had to go through the UIC IRB process again for review. It was approved on the day of this meeting. And they will be distributing the survey online with the hope of getting 260 respondents in addition to the 39 they had before the survey was paused. They noted they have a number of leads to follow that have been shared with them by the FDDC staff. They have reached out to both UCEDDs, Partners in Policymaking (current students and alumni), and other individuals including Terri Daly. They welcomed other ideas from the council for recruitment.

Mary Jo McKay shared that The Florida Meals on Wheels is starting up again and might be a good group to email for their conference to complete the surveys. That group would include older adults and children with disabilities. She will email Hope. Contacts for the Florida Meals on Wheels Association were nkelly@mealsonwheelsplus.org; emcleod@friendshipcenters.org

Jean Sherman shared that, originally, the project stemmed from the Family Care Councils and concerns of aging caregivers, particularly in the north of Florida. She suggested adding Family Care Councils (FCC) as options for recruitment. Jean asked if Susan Nipper knew whether FCCs are still meeting. Susan will reach out to Stephanie Rogers and will share the information on all the FCCs. Yolanda noted that she has a list of all the chairs of the FCC and will forward it to the researchers.

Jean noted that the original focus for this project was to capture information from older parents and caregivers from these FCCs including parents in their 80s and even early 90s that were concerned about their family situations. But she is not really seeing those older parents represented in much of the data. So, she is hoping that reaching out to the FCCs will help to capture that group.

Damian Gregory asked if the research group got the level of participation the researchers expected. He also wanted to know what the task force could do individually and collectively to support their work and help them get more participants for the focus groups and the survey. He expressed concern that if they had difficulty recruiting participants originally, it would be magnified in trying to recruit more participants.

Dr. Murthy noted that the focus groups are completed. The survey will be just for the family caregivers, and it is likely to be easier to recruit participants than for the focus groups.

Damian Gregory also suggested that the Family Café has a huge mailing list, and it might be helpful to reach out to see if the researchers can reach out to them. Hope Sparks has been in contact with them and will follow up with them about the survey.

At Jennifer Chung's suggestion the researchers included the survey link in the chat. That link is: https://uic.ca1.qualtrics.com/jfe/form/SV_3pylZdN0eLERZoG
Or <https://go.uic.edu/StrivetoThriveFL>

Dean E. Gregory-Stewart asked if anyone from this meeting could participate in the survey. And the answer was yes.

4:23 pm AGEDD Project

Yolanda opened the floor for Jennifer Chung and Susan Kabot at 4:23 to report on the AGEDD Project. Jennifer reported there are 14 community partners (CoPs) with about 3 calls per contract people.

Susan shared that each of the CoPs is composed of at least one aging network service provider and one disabilities service provider. The goal is to educate them about each other and hopefully increase service provision and collaboration. They have been working for several years to try to coordinate for referral systems and cross-service provision. The activity for next year for this provider is to hold a summit with speakers of common concerns for both systems and workgroups to develop courses of action. That will be April 2026. More information will be coming about that.

4:28 pm Project of National Significance - BADN

At 4:28, Yolanda recognized Chris Reeve to talk about the Project of National Significance. Chris shared that the Strive to Thrive project and the AGEDD project are both part of a Project of National Significance for Bridging Aging and DD Networks. With that project, the FDDC receives technical assistance hours from the federal government to help bring the two systems together and create supports. For our technical assistance, we will have a researcher doing an environmental scan of all the Area Agencies on Aging in Florida. This may help to clearly identify what supports and services are available in different parts of Florida that may be able to integrate with the DD services to serve both aging caregivers and aging individuals with I/DD.

In addition, Jennifer Chung and Chris will be attending the Developmental Disabilities and Aging Conference in May. They will bring the information they gain from the conference back to the researchers and the task force for ideas.

Damien Gregory asked if we knew anything about how the federal program changes might affect the FDDC. Chris Reeve shared that at this time there have been no changes to how we operate. So, the Council is continuing to operate as usual until we are told differently.

4:35 pm Public Input

At 4:35 Yolanda asked for any public input. There was none.

4:38 pm Adjournment

Reminders were provided of the 5 PM meeting for the CRA being held today and another on April 24, 2025. And at 4:38 pm the meeting was adjourned by Yolanda.

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Florida Developmental Disabilities Council, Inc.

Self-Advocacy Leadership Task Force Minutes 11/20/2024

Present: Danielle McGill, Chair; Sarah Goldman, Co-Chair; Eddie Hall; Enrique Escallon; Lauren Modawell; Yolanda Herrera; Mirna Diaz.

Staff: Kristin Vandagriff.

Guests: Sue Kabot, Margaret Hooper, and Chris Reeve (FDDC)

The meeting was called to order by Task Force Chair McGill at 4:03 pm.

Task Force Chair, Danielle McGill, welcomed task force members and guests and instructed staff to conduct roll call. She also reminded attendees that the meeting was being recorded. The July 24, 2024, task force meeting minutes were adopted as presented with Yolanda Herrera making the motion, and Eddie Hall making the second, and members answering in the affirmative. Chair McGill directed staff, Kristin Vandagriff, to begin the project update presentation.

I. PowerPoint Presentation on Project Progress Updates

Kristin Vandagriff, the Director of Programs who provides staffing to this task force, reminded members of the overarching goal for FDDC Self-Advocacy and Leadership projects. Kristin Vandagriff provided updates on the Fellows Leadership Program denoting that three new Fellows are being onboarded and five past Fellows have stayed on in a mentorship capacity. One additional new Fellow slot is in the recruitment phase. It was reported that the Fellows have continued to support FL SAND in holding board meetings, developing and disseminating monthly self-advocacy newsletters, hosting monthly statewide self-advocacy calls, as well as helping regional groups with training and technical assistance. Additionally, it was reported that the Fellows are planning for their DD Day 2025 involvement, supporting FL SAND as the organization develops its platform, planning for a Florida Self-Advocacy Conference slated for August 2025, and launching the Route to Self-Determination Train-the-Trainer. Fellows evaluation results for Year 3 of the state plan were shared covering Leadership Rating Scale results as well as Organizational Management Growth Scale results. Results demonstrated increases in leadership skills of the Fellows themselves as well as a strong level of impact continuing to be noted by the Fellows on FL SAND. Fellows Leadership Program performance measure results were shared with it being reported that all targeted outputs were met, and in almost all cases exceeded. Additionally, impact stories of the Fellows were also shared in addition to impact stories regarding FL SAND. Yolanda Herrera asked for information on a way to help recruit for the Fellows Leadership Program. Kristin Vandagriff shared that program information along with the application are both posted on the FL SAND website and that she will send those links out after the meeting. Eddie Hall, Danielle McGill, and Mirna Diaz all shared positive input regarding the program's impacts.

Kristin Vandagriff also provided a project update regarding the Partners in Policymaking (PIP) Program. Information was shared regarding the PIP 2024-2025 class having conducted three sessions thus far. PIP Class of 2023-2024 outcomes stories were shared as well as performance measure outcomes. It was reported that all targeted outputs were met and, in most cases, exceeded. An update was given relating to the new PIP Alumni Program with information shared on how many graduates registered as well as regarding the launch of the first program meeting in October 2024. Sarah Goldman noted appreciation for the PIP Alumni Program. Yolanda Herrera noted that this new program offers FDDC a wonderful opportunity to see PIP grow in the future. Kristin Vandagriff provided information relating to the PIP Curriculum Project and best supporting people with an intellectual/developmental disability at a 2nd-3rd Grade reading level to be supported in the Florida PIP program. It was reported that the Autistic Self-Advocacy Network (ASAN), which is the contractor for this project, just entered into a renewal contract for 16-months which will focus on adding in images to assure that the curriculum and associated materials are in full Easy Read format, as well as a video component which will read

the curriculum to the user. A narrative summary outline has been completed, and image integration has begun. It was also shared that a PIP Curriculum Review Committee was selected and will first meet on Dec. 9.

Highlights from the annual federal program performance reporting were shared with totals of self-advocates and family members trained in leadership, to date, being provided by Kristin Vandagriff. The posters for each project were reviewed as a reminder of where each project's overall efforts were and their likely next steps moving forward over the remaining years of the plan.

Kristin Vandagriff also discussed the federal Self-Advocacy Requirement for DD Council State 5-Year Plans, covering the three needed criteria, noting that all three criteria must be met within the State 5-Year Plan each of the five years of the plan. It was discussed how the three projects within Goal 4 currently meet these three federally required criteria.

Sue Kabot shared the purpose of the grid format that would be completed for each of the Goal 4 projects to develop a consensus recommendation to the Council related to which of the current projects might need to continue in the next State 5-Year Plan. Dr. Kabot noted that the goal was to reach a logical consensus through discussion to form this recommendation to the Council and that the next Council meeting would include more discussion on this and other project areas related to what current work may be critical to continue. It was reported that Council members will also be taking part in focus groups before and after the January Council meeting to share their individual input related to areas where they see gaps and needs related to Floridians with I/DD. Through the grid format, outcomes to date were discussed as well as the projected 5-year outcome for each project. Task force members discussed and determined the priority for each project based on whether they did not need to continue, were nice to continue, would be monitored only, or must be continued. Additionally, members determined the likely potential timeframe commitment needed in the next State 5-Year Plan for each project noted to be recommended for continuation.

- With respect to the PIP project, Danielle McGill noted the importance of serving a diverse array of ages and that she felt PIP should be continued, mentioning that Florida PIP is really leading the way in many areas. Enrique Escallon agreed, noting that it is important to look at the whole lifespan through project work and that he felt the PIP model was a good one, noting that the work had shown growth, but was not fully accomplished yet. Yolanda Herrera shared that she thought PIP's work was moving into a good place, but that it needs more time for the opportunity to move to the next level and mature. Eddie Hall noted that he felt PIP must continue and noted the Council has gained a lot from the program including many new members who were program graduates. Mirna Diaz also noted that PIP is leading the way and seeing strong success. The task force came to a consensus that the PIP project must be continued, serving both a regular annual class of new advocates as well as its program for alumni. Due to the self-advocacy requirement denoting criteria to be met in each year of the State 5-Year Plan, member selected 5 years as the general anticipated time commitment from the information currently known.
- Regarding the PIP Curriculum project discussion, Yolanda Herrera shared that the best way to describe this circumstance is that the curriculum will be completed at the end of the current plan; however, it won't have had the opportunity to be tested. She noted that it needs to continue as it's a good project, but only part of the way there. Danielle McGill noted agreement with this and shared that she felt the project had come far and that the Council needs to see it through. Mirna Diaz also noted agreement and mentioned that progress has been shown and it should continue. The task force came to a consensus that the PIP Curriculum project must be continued. They further determined that the time commitment would be listed as 5 years to match the regular PIP program; however, it was noted that the new model's needs will best be known following piloting which could also further inform the timeline.
- The task force discussed the Fellows Leadership Program and Danielle McGill shared that this program would be well taken to explore collaboration with YLF in the future and assure that a diversity of age groups are represented. Danielle McGill described how she often sees a gap in opportunities available to the age group of people with DD ages 30-40. Yolanda Herrera shared that the project model is still young and growing and that she did not desire to leave unfinished business and thus it made sense to continue this project. Enrique Escallon noted agreement. Eddie Hall shared that he felt this project must continue. The task force reached a consensus that the Fellows Leadership Program must be continued. They determined that due to the self-advocacy requirement denoting criteria to be met in each year of

the State 5-Year Plan, member selected 5 years as the general anticipated time commitment from the information currently known.

A grid covering these areas was completed during the meeting for each of the three projects and yielded the following Self-Advocacy and Leadership Task Force recommendations:

1. Fellows Leadership Program
 - a. Priority Determined: Must continue
 - b. Potential Time Commitment – 2027-2031: 5 years
 - c. Comment: Consider collaboration with YLF and similar activities, possibly a mentorship component.
2. Partners in Policymaking
 - a. Priority Determined: Must continue
 - b. Potential Time Commitment – 2027-2031: 5 years
 - c. Comment: Making sure advocacy training for a wide range of ages was noted to be needed.
3. Partners in Policymaking Curriculum Project
 - a. Priority Determined: Must continue
 - b. Potential Time Commitment – 2027-2031: 5 years
 - c. Comment: none

II. Questions, Discussion, and Next Meeting

Task force members did not mention any concerning issues to bring to the State Plan Committee related to task force projects. Task force members noted that they next wanted to meet on April 2, 2025, from 4:00-5:30 pm. This meeting will occur via Zoom. Members denoted wanting meeting agendas to cover project updates.

III. Public Input

There were no comments from the public.

The meeting was adjourned at 5:40pm.

Approved by the Task Force on 04/02/2025

Florida Developmental Disabilities Council, Inc.

Self-Advocacy Leadership Task Force

Minutes

04/02/2025

Present: Sarah Goldman, Co-Chair; Eddie Hall; Enrique Escallon; Yolanda Herrera; Mirna Diaz

Absent: Danielle McGill, Chair; Lauren Modawell

Staff: Kristin Vandagriff

Guests: None

The meeting was called to order by Task Force Co-Chair Goldman at 4:03 pm.

Task Force Co-Chair, Sarah Goldman, welcomed task force members and instructed staff to conduct roll call. She also reminded attendees that the meeting was being recorded. The November 20, 2024, task force meeting minutes were adopted as presented with Enrique Escallon making the motion, and Eddie Hall making the second, and members answering in the affirmative. Co-Chair Goldman directed staff, Kristin Vandagriff, to begin the project update presentation.

I. PowerPoint Presentation on Project Progress Updates

Kristin Vandagriff, the Director of Programs who provides staffing to this task force, reminded members of the overarching goal for FDDC Self-Advocacy and Leadership projects. Kristin Vandagriff provided updates on the Fellows Leadership Program denoting that four new Fellows were now participating in the program and five past Fellows have stayed on in a mentorship capacity. It was reported that the Fellows supported FL SAND in the following areas: supporting FL SAND in the development and presentation of legislative priorities, in holding board meetings, developing and disseminating monthly self-advocacy newsletters, hosting monthly statewide self-advocacy calls, managing social media outreach and website platforms, as well as helping regional groups with training and technical assistance. An example of the FL SAND legislative priorities document was shown. Additionally, it was reported that the Fellows presented to self-advocates through their “Working the Session” training as well as collaborating with FCIC to present on a Working Peoples Program training. An update was provided regarding the Fellows efforts to plan and host the 2025 Florida Self-Advocacy Conference which will occur on August 22-24, 2025. It was noted that the venue of the Florida Mall Hotel has been secured, and the theme will be “The Power of Our Voices!” The Fellows were noted to be launching the Route to Self-Determination Train-the Trainer with FL SAND regional group leaders. An update on the Fellows efforts as part of DD Day 2025 was shared with it being denoted that seven Fellows attended and had 11 meetings with state senators and 8 meetings with state representatives as well as meeting with a mayor who was at the Capitol. Additionally, the Fellows provided coverage for a FL SAND exhibitor table providing self-advocacy resources for DD Day.

Kristin Vandagriff also provided a project update regarding the Partners in Policymaking (PIP) Program. Information was shared regarding the PIP 2024-2025 class having recently graduated 20 advocates comprised of 3 self-advocates and 17 family members. The winner of the Alan C. Wesley Award for 2025 was reported. PIP involvement in DD Day 2025 was shared with it being reported that 12 of the recent graduates took part in meetings with 20 state senators and 23 state representatives. An update was provided regarding the 2025-2026 PIP class planning efforts with class schedule denoted as well as an update on applications received and the selection committee process given. An update was also provided regarding the new PIP Alumni Program with information shared on virtual meetings, training provided to graduates, as well as their involvement in DD Day 2025. Additionally, it was noted that PIP Alumni are taking a survey to determine their interest areas to support regional communication and collaboration. Yolanda Herrera noted that this new program appears to have a

good future and that it was nice to see the continued positive outcomes arising from the efforts of the past Advocacy Summit. Kristin Vandagriff reported to the group that the Advocacy Toolkit was updated to include a section on how to hold a local DD Day. Sarah Goldman asked if there might be an opportunity for those who hold local DD Day events to attend DD Day in Tallahassee. It was noted that some PIP Alumni had covered their own travel costs and took part in DD Day, and this may be an option for others in the future. Enrique Escallon noted having attended a recent virtual advocacy days and that it may be an innovative option for advocates who cannot travel to Tallahassee. Kristin Vandagriff provided information relating to the PIP Curriculum Project and best supporting people with an intellectual/developmental disability at a 2nd-3rd Grade reading level to be supported in the Florida PIP program. It was reported that the Autistic Self-Advocacy Network (ASAN), which is the contractor for this project, has added Easy Read images and formatting to the previously translated text for both Sessions 1 and 2 of the PIP curriculum and associated materials. It was shared that both sessions have been reviewed by FDDC staff and are being reviewed by a PIP Curriculum Review Committee with extensive lived experience. It was also reported that ASAN is beginning to develop the video component for Session 1 which will read the curriculum to the user.

II. Questions, Discussion, and Next Meeting

Task force members did not mention any concerning issues to bring to the State Plan Committee related to task force projects. Task force members noted that they next wanted to meet on August 13, 2025, from 4:00-5pm. This meeting will occur via Zoom. Members denoted wanting the meeting agenda to include staff from ASAN providing a glimpse into the completed PIP Curriculum sections, and if available, corresponding video component. It was also noted that members wanted to continue to receive general project updates.

III. Public Input

There were no comments from the public.

The meeting was adjourned at 4:58pm.

STATE PLAN

Fiscal Year 2025 (October 1, 2024 – September 30, 2025)

BLACK: First Tri-Annual Update (October – January)

BLUE: Second Tri-Annual Update (January – May)

PURPLE: Third Tri-Annual Update (May – September)

| Goal 1: Access to Services | | | | |
|--|--|---------------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Access to Services Through Knowledge (ASK) | The National Association for the Dually Diagnosed (NADD) | September 2024 – September 2025 | \$197,975 | In Year 4, NADD will focus on research to identify gaps in information in collaboration with the ASK: Translating Research Into Practice Provider and gather information to assure that the population and community resources are representative of the overall population of the state. Through focus groups and/or structured interviews with families and caregivers of individuals with I/DD, the research will create categorical charts of issues and resources from the research by ages including identified life stories, quotations, pain points, and solutions. This information will be shared with the ASK: Translating Research Into Practice Provider to develop personas and journey maps to include scenarios, stories, and links to community resources for the forthcoming ASK web-based platform. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|--|
| October 2024 – January 2025 | The provider established meeting dates for the Steering Committee and initial membership. They are continuing to seek out members for the Content Advisory Committee and will establish regular meeting dates with them in the next period. They continue to work collaboratively with the Translating Research project. They are collaborating on the research design and questions to assure they have the information needed by the team to create the journey maps (i.e., road maps) and personas (i.e., avatars) effectively. |

| Tri-Annual Period (dates) | Update Information |
|---------------------------|---|
| January 2025 – May 2025 | The provider finalized the research protocol and launched the data collection portion of their research for this year. In addition, they have identified several potential new sites for data collection that are expected to allow recruitment of low-incidence populations including Hispanic and rural families. The protocols and questions were developed and refined in collaboration with the Translating Research provider. The two groups meet twice monthly and have worked very well together. They met with the Steering Committee and are still recruiting new members for this group. They presented a review of the research goals to the 3 current members. They also met once with the Content Advisory Committee, which included 11 parents and 1 guardian. |

| Goal 1: Access to Services | | | | |
|---|-------------|---------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Access to Services through Knowledge: Translating Research into Application | Mathematica | April 2024– December 2024 | \$ 171,120 | The purpose of this Phase 2 project planned for addressing the Council’s Access to Services through Knowledge activity is to translate results from the initial quantitative and qualitative research findings into personas and/or journey maps that will subsequently be used to populate a web-based platform via a Phase 3 project. It is envisioned that this new system will enable families/caregivers of individuals with I/DD to not only address immediate needs but also empower them to prepare for addressing issues they will face throughout the lifespan in securing access to services, supports, and programs. |

| Tri-Annual Period (dates) | Update Information |
|--|---|
| October 2024- December 2024 | <p>As part of the final deliverable in December, they presented 5 journey maps and outlines for 5 personas. During this time, the provider conducted 8 listening and feedback sessions with caregivers and family members to review the journey maps and personas. In addition, they received feedback from the Content Advisory Committee and the Steering Committee that impacted their work. As part of these sessions and based on discussion with the collaborating partner and FDDC, they have shifted the presentation of the tools so that the journey maps more resemble road maps. In other words, instead of focusing on the journey of an individual through accessing information, they now focus more on paths that can be taken at times of significance (e.g., transitions, early identification). In addition, the personas will be reconceptualized as avatars with examples of individuals moving through the different points of the road maps.</p> |
| January 2025 – May 2025 | <p>As part of their first deliverable in this contract, the provider shared 5 initial roadmaps (i.e., journey maps) and 5 initial personas (i.e., avatars). The roadmaps included: Education, Employment, Guardianship, K-8 Exceptional Student Services, and Volunteering. The avatars were linked to these roadmaps. Both the avatars and roadmaps were developed in collaboration with the ASK Research project staff in their twice-monthly collaborative meetings. The provider worked well with the ASK Research project in developing the questions for interviews and seeking feedback about the roadmaps and personas. They sought and integrated feedback at different stages of the avatars and roadmaps from the research group, the Steering Committee, and the Content Advisory Committee during this deliverable. And they are establishing listening sessions with agencies to assure the steps in roadmaps are clear and accurate.</p> |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|-------------------|---------------------------------|--|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Best Practices in Case Management | Mathematica, Inc. | September 2024 – September 2025 | \$703,000 for Case Management, Measuring Service Quality, and Researching Provider Solutions | During Year 3 of the project, the aim is to work towards the adoption of the checklists for individuals with I/DD and caregivers by an MCO organization that will pilot services to individuals with I/DD in two areas of the state as well as explore adoption of the Toolkit by other agencies in Florida (e.g. APD). Work will also begin to develop a web-based version of the Toolkit for ease of administration that will be housed on the FDDC website and available to individuals with I/DD and family members/caregivers. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|--|
| October 2024 – January 2025 | The workgroup met to review the finalized versions of the checklists for individuals with I/DD and caregivers. They reviewed rough video formats for the training on how to use the checklists and made recommendations. They also saw examples of a dashboard where groups could sign in and data could be aggregated. This was thought to have more potential to be useful to provider agencies for evaluative purposes and a way to guide professional development activities. Work to finalize the format is complete and the goal is to post the checklists in January. |
| January 2025 – May 2025 | The Best Practices in Case Management Guide is now available on the FDDC website as a fillable PDF. The three training videos are also available on the FDDC website. There are additional tools for people with I/DD and caregivers to use to help them provide feedback if they would like their case manager/support coordinator to help them in different ways. |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|-------------------|-------------------------------|--------------------|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Researching Provider Solutions | Mathematica, Inc. | October 2024 – September 2025 | | During the 2024–2025 year, a mixed-methods research study will be conducted to gather information directly from direct support professionals (DSPs). The purpose will be to gather information regarding facilitators and barriers that impact the supply of DSPs in Florida. Recommendations for legislative actions and policy/practice changes will be made. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|--|
| October 2024 – January 2025 | The workgroup met to review and provide input into the survey that will be developed for DSPs working through the iBudget waiver to complete. Recruitment strategies were discussed. They also reviewed the structure of focus group(s) that would be held to gather similar information for DSPs working in CDC+ settings. Recruitment strategies were discussed for the focus groups. The results will not be fully available for use during the legislative session, but some preliminary information may be available for use then. |
| January 2025 – May 2025 | The survey of direct support professionals (DSPs) was released. Unfortunately, through our social media announcement, an unscrupulous individual saw that gift cards were being given for completion and, within a very short time, completed over 700 submissions. The survey was pulled from social media. We were fortunate that there were more than 140 complete surveys as the target was 150 complete surveys. Recruitment for a focus group of DSPs who are employed by CDC+ families or those privately employed is taking place in March through the beginning of April. |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|-------------------|-------------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Measuring Service Quality | Mathematica, Inc. | October 2024 – September 2025 | | During the 2024–2025 year, this project will focus on developing tools for individuals with I/DD and family members/caregivers can use to assess adult day training programs (ADTs) and supported employment programs and services. These tools will provide information to program participants and prospective participants to learn about elements that lead to quality and allow them to make better decisions about which programs and services are a good match for them. Training videos for individuals with I/DD and family members will be developed for the residential tool. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|--|
| October 2024 – January 2025 | The workgroup will be meeting in January to review the instrument to assess supported employment programs. The training videos for the residential tool are in the formative stage. The information gained through digitizing the case management tool will be used to do the same for the tools in this project. |
| January 2025 – May 2025 | The Residential tool is almost in final form and is available on the FDDC website. Mathematica staff will be traveling to Broward County to do in-person testing of the adult day training tool with individuals with I/DD and family members at ARC Broward and Ann Storck Center. They will also be filming training videos for the residential tool. Travel dates are April 9-11, so this will be completed before the May Council meeting. Progress has slowed on the supported employment tool while these two tools are in process and will be picked back up in the summer. |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|--|---------------------------------|--------------------|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Addressing the Behavior Therapist Shortage | University of Florida (UF) Board of Trustees | September 2024 – September 2025 | \$300,000 | In Year 3, the project focuses on implementing and disseminating the training curriculum via didactic modules and other resourced tools for BCBAs and other behavioral therapists. The competency-based curriculum will be manualized, and implementation will continue to be evaluated. In addition, the project will develop the infrastructure and measures that will result in sustainability for an internship and training program. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|---|
| October 2024 – January 2025 | There was a delay in getting the new contract finalized by the University of Florida which postponed work for approximately the first month of the contract. An amendment was completed to the contract in November to amend the budget for an increase in indirect costs. In their first deliverable for this contract year, the project team completed the 12-part manualized competency-based curriculum for clinicians supervising behavioral programs in the assessment and treatment of dangerous and destructive behaviors emitted by individuals with I/DD. In addition, they created a new task force for the contract year that gathered a wide variety of university faculty and service providers in ABA to specifically address the issue of sustainability and integration of the internship program as part of existing academic programs. |

| Tri-Annual Period (dates) | Update Information |
|---|--|
| <p>January 2025 – May 2025</p> | <p>The project staff met with some of the members of the task force individually to discuss potential barriers to adopting and sustaining the training for their organizations. From this information, they drafted a checklist for adoption and sustainability. They created 2 formats—one for universities and one for organizations, recognizing that the two may have slightly different resources (e.g., faculty vs. agency employees). They also met with other members of the task force to discuss including their employees in the online or on-site didactic training. These meetings took the place of their task force meeting this period. They will meet with the full task force next period. They reported 7 new enrollees in the course and included their pre-assessment checklists. Finally, they added two sections to the training manual. The first focused on the writing of behavior support plans and included examples. The second focused on additional considerations in completing assessments and choosing interventions based on the environment in which they will be conducted. These additional elements in the manual included two additional slide decks for the training. Feedback was given to them on both, and further development will be explored in the next contract year.</p> |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|--|---------------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Dual Diagnosis Training | The National Association for the Dually Diagnosed (NADD) | September 2024 – September 2025 | \$229,337.55 | During Year 3 of the project, NADD developed four training modules that were offered virtually, in-person, as well as through an integrated learning system (ILS) on the NADD website. Participant feedback was incorporated into the modules. For the Year 4 project, NADD will be providing training to 10 agencies focused on crisis prevention, intervention, and non-aversive approaches to behavior management. The training will be focused on an interagency problem-solving approach for the individuals with the most complex needs. The curriculum will be finalized, and the next steps will be proposed to the Council. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|---|
| October 2024 – January 2025 | The first meeting of the workgroup discussed the plan for implementing the cross-agency training initiative. At the same time, DCF approached Sue Kabot and requested use of the training in dual diagnosis completed during the second year of the project on the topic of crisis. The first meeting of the inter-agency/organization workgroup met in December. The crisis training will be presented as an add-on day to the January CARD conference in Orlando at no charge to participants. |
| January 2025 – May 2025 | Several meetings of the interagency workgroup have met to develop a model of collaboration for problem solving complex cases that require the resources of multiple agencies. NADD also presented their Crisis training series as a pre-conference day to the CARD conference in January. They had over 40 registrants and 26 participants. The value of attaching training to existing activities was demonstrated with this. A training module on collaborative problem solving is being developed. |

| Goal 2: Home- and Community-Based Delivery Systems | | | | |
|--|---|-----------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Training First Responders | Florida Atlantic University Board of Trustees | June 2024 – June 2025 | \$174,140 | In Year 3, the project will implement the train-the-trainer curriculum for law enforcement officers and emergency medical personnel. Lead trainers will go through the training and learn how to implement the training with their own staff. They will then be observed and coached through training by the FAU project manager and be checked for fidelity to the model. An asynchronous version of both training curriculums will become available. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|---|
| October 2024 - January 2025 | Train-the-trainer pilots are being conducted in two parts. As of December 12, 2024, six Part 1 trainings were held. They included five for law enforcement: Jupiter Police Department, CIT at USF CARD, Seminole County Sheriff's office, CIT Aspire, CIT Trainer in Gainesville. One Part 1 training was conducted for Broward County Fire Rescue. Part 2 sessions were completed for Jupiter Police Department and are scheduled in the other five for January and February. Two EMS groups are still being recruited to pilot the training for Emergency Medical Responders. |
| January 2025 – May 2025 | The curriculums for the LEO and EMS train-the-trainer activities were updated and uploaded to Canvas. Part 1 for 6 providers was completed, and 1 provider is scheduled to complete it in April 2025; Part 2 for 6 providers has been scheduled for April and May of 2025. One provider from Part 1 dropped out due to health-related issues. Dissemination of Project: Dr. Exume published an article in the Spring 2025 FDLE Newsletter. Dr. Exume presented at the Council for Exceptional Children 2025 Convention about her training titled "Training First Responders to Respond to Emergency Situations with Students." |

| Goal 3: Aging Caregivers | | | | |
|---|---|---------------------------------|--------------------|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Aging Generations' Expectations in Developmental Disabilities (AGEDD) | Margaret Lynn Duggar & Associates, Inc. | September 2024 – September 2025 | \$125,000 | This is the fourth year of this Project. It was designed to establish a sustainable interagency collaborative between the Intellectual and Development Disabilities (I/DD) and Aging networks. This year, the focus will continue developing relationships in local communities through the Communities of Practice (CoP) and with state agencies to improve support and services through both Aging and I/DD Networks. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|---|
| October 2024 – January 2025 | <p>There are currently 13 Communities of Practice (CoPs), with 19 counties actively participating. Each CoP averages three meetings per year. Three Communities of Practice (CoPs) have met during this period. Several other CoPs are scheduled to convene by the end of January. Technical Assistance was offered to all the CoPs by the provider. The Aging Caregivers Task Force/ Strategic Alliance Team met in December to review the project's progress and discuss recommendations for the 2027 State Plan. The team felt strongly that more work with Aging should continue.</p> <p>The first planning meeting discussed committee membership for planning the proposed Aging Summit for Spring of 2026. The provider is working on securing a location for the event. The planning committee will be expanded to include additional stakeholders. Planning will continue throughout this contract year.</p> <p>Twenty-three individuals accessed new services due to the work and relationships that developed within the CoPs. Efforts will continue to increase service options for caregivers and individuals with I/DD.</p> <p>Several CoPs have provided cross-training to each other's staff members about the other Network.</p> |
| January 2025 – May 2025 | <p>During this period, the Duval CoP met twice, Indian River group met once (includes Martin and St. Lucie), Leon County met three times, Miami-Dade met twice, and Broward met once. Escambia/Santa Rosa met once, Hillsborough met once, Osceola met once, and Sarasota met once. Planning is also underway for an AGEDD conference for all the participants of the CoP. It will be held in Kissimmee in April 2026. The hotel is reserved, and the agenda is being developed.</p> |

| Goal 3: Aging Caregivers | | | | |
|---|---|---------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Researching Aging Caregiving Families (Strive to Thrive: Supporting Families Across the Aging and DD Networks Research Project) | The Board of Trustees of the University of Illinois | May 2024 – May 2025 | \$151,900 | The University of Illinois Chicago Institute on Disability and Human Development will conduct research to identify the factors that allow families of aging individuals with I/DD and their family members/caregivers to thrive. An environmental scan of the literature on thriving across the aging and I/DD communities was conducted during Year 1 of the project. A mixed methods research study will be conducted using focus groups/interviews (i.e., qualitative component) and surveys (i.e., quantitative component) to obtain information about the lived experiences of those that thrive. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|---|
| October 2024 – January 2025 | The University staff have facilitated seven focus groups (5 in person & 2 via Zoom). Individuals participating were from various parts of the state. Four focus groups were for individuals with I/DD, and three were for Aging Family Caregivers. The participants shared useful information that will be analyzed and included in the final research paper. Additional groups will be conducted next quarter. |

| Tri-Annual Period (dates) | Update Information |
|---------------------------|---|
| January 2025 – May 2025 | The provider has now completed focus groups with 15 family members in English and 13 individuals with I/DD in English. They continue to struggle with recruitment of Spanish-speaking families and individuals with I/DD. Consequently, they intend to make a shift with the Spanish groups to be interviews instead of focus groups. They are unsure if they will complete all 40 focus groups before needing to analyze the data. In addition, the project launched the online survey during this period. However, concerns were raised by the council regarding the negativity of the survey itself, which had not been shared in its entirety with the task force. After discussion, the survey has been revised. It has been re-submitted to the IRB at the University. Once approved and translated into Spanish, it will be redistributed with the hope of recruiting 300 participants. Based on their difficulties recruiting subjects, the delay in the survey and previous delays with IRB approval, they have been presented with a no-cost extension from May 2025 until July 31, 2025. |

| Goal 4: Self-Advocacy Leadership | | | | |
|---|--|---------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Florida SAND Fellows Leadership Program | Pathways Resolution Center, Inc. Doing Business As (dba) OMS, Inc. | August 2024 – August 2025 | \$280,316 | The goal of this project, in its eighth year of funding, is to fully expand leadership training for self-advocates by continuing and building on the Florida SAND Fellows Training Program to train four new Fellows a year and use existing Fellows as peer mentors for the year that follows their training. Fellows will be engaged in developing job skills of maintaining the self-advocacy organization, managing communications for the network, and offering technical assistance and peer mentoring to new Fellows as needed. As each cohort of Fellows becomes trained, leadership training will be provided by the Fellows and will include fine-tuned content that the existing Fellows have created (e.g., Breaking Barriers Training Academy), and also training for other self-advocates in the Route to Self-Determination curriculum. |

| Tri-Annual Period (dates) | Update Information |
|--|--|
| September 2024 – January 2025 | <p>The Fellows Leadership Program recently onboarded three new Fellows, with a last new Fellow slot being chosen towards the end of 2024. The program also welcomed back five past Fellows who are returning in a mentorship capacity to mentor the new Fellows and Florida SAND leadership. Fellows received orientation training and continue to receive weekly training by the provider. The Fellows have continued to support Florida SAND to hold board meetings, put out a monthly self-advocacy newsletter, hold a monthly self-advocacy call, and manage the organization’s social media and websites (communication hub). Additionally, they provided board training to Florida SAND with ongoing technical assistance as well as training and technical assistance to regional self-advocacy groups. Moving into the new year, each Fellow will have set regional groups that they work with on an ongoing basis to support their individual needs. Initial planning efforts to secure a venue and a date for the 2025 Self-Advocacy Conference have begun. This is tentatively slated for August 2025. The Fellows completed a soft launch of the Route to Self-Determination Train-the-Trainer online platform, working with other self-advocates to beta test the new training platform. A full launch is slated for early 2025. The Fellows are also in the process of planning for their DD Day 2025 involvement and supporting Florida SAND with training to develop its own legislative platform. Evaluation results from last year’s Fellows demonstrated leadership skill growth for each Fellow. Most Fellows saw growth in multiple leadership skill areas improve. Upon program conclusion, 70% of Fellows leadership skill areas were noted to be very good-excellent; the remaining 30% were primarily noted as good with a few noted as average. Additionally, the Organizational Rating Scale which seeks to measure the impact the Fellows (as a group) have on Florida SAND maintained consistently high levels. Strong increases in communication areas were noted due to the Fellows’ excellent work in managing the Florida SAND communication hub.</p> |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|---|
| January 2025 – May 2025 | <p>The Fellows Leadership Program now includes four newly onboarded Fellows, as well as five mentor Fellows who are receiving new training in mentoring. All Fellows continue to receive weekly training. Over this date span, Fellows have supported the statewide self-advocacy organization, Florida Self-Advocates Network'd (FL SAND), to: develop legislative priorities for 2025, hold a board meeting, facilitate monthly statewide self-advocacy calls, manage their social media and website presence, send monthly listserv newsletters, and support local self-advocacy groups within FL SAND through training and technical assistance. Four new Fellows and three mentor Fellows attended DD Day 2025, covering a FL SAND self-advocacy resource table as well as meeting with their state legislators. The Fellows provided FL SAND and other self-advocates with a “Working the Session” virtual training to support self-advocates in keeping a pulse on important issues during the session and understanding opportunities they may have to share their voice. Additionally, the Fellows partnered with FCIC to offer training on the Working Peoples Program. The Fellows have begun to take the Route to Self-Determination (RTSD) Train-the-Trainer online course and have been assigned local self-advocacy groups to support over the course of the year, which will include supporting leaders to take the train-the-trainer course and offer local RTSD trainings to other self-advocates. The 2025 Self-Advocacy Conference event venue will be the Florida Mall Hotel with dates set for August 22-24, 2025. The theme of “The Power of Our Voices!” has been chosen for this conference. The Fellows are in the process of determining keynote and breakout presenters and will serve as conference hosts and facilitators, in addition to providing direct self-advocate instruction.</p> |

| Goal 4: Self-Advocacy Leadership | | | | |
|--------------------------------------|-----------------|---------------------------|--------------------|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Partners in Policymaking Coordinator | Stacey Hoagland | August 2024 – August 2025 | \$65,000 | The goal of this project, in its tenth year of funding for the Coordinator, is to plan and execute all aspects of the Council’s Partners in Policymaking program. Partners in Policymaking is a national model designed to educate individuals with intellectual and developmental disabilities and family members on self-determination, disability systems, and how to share information to educate policymakers. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|--|
| October 2024 – January 2025 | The PIP 2024-2025 class is now a little more than halfway complete, with 4 of 6 sessions having been held. This class will graduate in February and will join the Council in March to take part in DD Day 2025. The new PIP Alumni Program launched in October 2024. Alumni registered for this program include 124 family members and 15 self-advocates for a total registered of 139. Program alumni were provided with information to attend DD Day 2025, paying their own costs for attendance. Alumni also received information on leadership and advocacy opportunities. Several alumni took part in an ADA and Self-Advocacy Curriculum Train-the-Trainer event with the Southeast ADA Center, supported by FDDC staff to connect to this event. The PIP Alumni Program will feature an opportunity for past graduates to work together in their nearby region (15 regions mirroring Family Care Councils) to impact systems change. This group will meet again in February. Quarterly graduate calls with engaging speakers continue to be held to provide additional content information to graduates throughout the year to enhance their skills. The PIP Coordinator is beginning the process to plan for the PIP 2025-2026 class. Dates are in the process of being scheduled and presenters are close to being secured. Applications will open for the PIP 2025-2026 class on March 30 and will close on June 30. |

| Tri-Annual Period (dates) | Update Information |
|---------------------------|--|
| January 2025 – May 2025 | The PIP 2024-2025 class has concluded with 20 advocates graduating. This included 3 self-advocates and 17 family members. All graduates will be working on a major project over the next year to improve the lives of people with I/DD and their family members in the community. Twelve of these new graduates attended DD Day, visiting with their state legislators and providing committee testimony. The PIP Alumni Program has now met virtually twice and resulted in alumni being trained on the 2025 FDDC platform. Several also participated (at their own cost) in DD Day 2025. Alumni have also received training on FDDC's Advocacy Toolkit as well as other leadership and advocacy opportunities. A PIP Alumni Program Communication Survey has been distributed and will support alumni to work together in 15 regions which mirror Family Care Council regions. Quarterly graduate calls continue to be held to support ongoing knowledge gain on disability issues as well as leadership and advocacy skill building. Planning for the 2025-2026 PIP class is well underway with most presenters having been secured and dates being finalized with the event hotel. The application period for this class opened on March 1, with 13 applications received thus far. The application period will conclude on June 30. |

| Goal 4: Self-Advocacy Leadership | | | | |
|---|---------------------------------------|-------------------------------|--------------------|---|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Partners in Policymaking Curriculum Project | Autistic Self Advocacy Network (ASAN) | September 2024 – January 2026 | \$150,000 | The goal of this project, in its second year of funding, is to further develop a Partners in Policymaking (PIP) curriculum and associated activity materials for a target audience of people with cognitive disabilities, requiring supports based on moderate-to-severe functional levels, at a Grade 2 to 3 reading level or below. The curriculum and associated activity materials will be developed to run in conjunction with and parallel to the current existing Florida Partners in Policymaking program with the goal of supporting more participants with intellectual and developmental disabilities (I/DD), and specifically cognitive disabilities, to be integrated into this program. Partners in Policymaking is a national model designed to educate individuals with intellectual and developmental disabilities and family members on self-determination, disability systems, and how to share information to educate policymakers. |

| Tri-Annual Period (dates) | Update Information |
|------------------------------------|---|
| October 2024 – January 2025 | A renewal contract was executed for 16 months of work with the Autistic Self-Advocacy Network (ASAN). Thus far, all six sessions have been translated into Easy Read text to support a 2 nd -3 rd grade reading level or below. Currently, Easy Read graphics are being added to assure the curriculum and associated material are in full Easy Read format. Additionally, a video component is also being developed that will allow the curriculum to be read to the user. A narrative summary outlining how the work will be completed has been done, and Session 1 materials are in the process of having graphics added. A Curriculum Review Committee has been set up and includes the robust lived experience of people with development disabilities, family members, special educators, and a speech language pathologist. This group first met in December 2024. |
| January 2025 – May 2025 | Easy Read graphics have now been fully added into all Session 1 and 2 materials. This process included full Easy Read formatting as well. The PIP Curriculum Review Committee has now met three times to provide input on Easy Read materials for Sessions 1 and 2. FDDC staff edits, and recommendations from the PIP Curriculum Review Committee, have been incorporated into the majority of Session 1 and 2 materials. With Session 1 materials finalized, ASAN staff are in the process of completing the Session 1 video component to allow the curriculum to be read to the user. |

| Goal 5: Broad Systems Change/Emerging Needs: Advocacy and Communications Cross-Cutting Systems Change Projects | | | | |
|--|-----------------------|---------------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Easy Read | Dale DiLeo Consulting | September 2024 – September 2025 | \$85,575 | This consulting agreement provides for translation of selected Council documents into Easy Read and/or Plain Text formats. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|---|
| October 2024 – January 2025 | Converted Legislative Platform to Plain Text |
| January 2025 – May 2025 | Converted “Finding the right Adult Day Training program” and “Finding the Right Residential Service Provider” |

| Goal 5: Broad Systems Change/Emerging Needs: Advocacy and Communications Cross-Cutting Systems Change Projects | | | | |
|--|---|---------------------------------|--------------------|--|
| Project | Provider | Funding Period | Funding Allocation | Project Description |
| Spanish Translation | Lingua School, Inc. d.b.a. Lingua Language Center | September 2024 – September 2025 | \$30,000 | This consulting agreement provides for translation of selected Council documents into Spanish or other languages deemed appropriate. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|--|
| October 2024 – January 2025 | This project completed a translation of the 2025 Legislative Platform and provided in-person translation services for the Strive to Thrive meeting in Miami. |
| January 2025 – May 2025 | Translated “Finding the Right Residential Service Provider” and “Working with Case Managers.” Provided ZOOM translation services for a Strive to Thrive Focus Group. |

| Goal 5: Broad Systems Change/Emerging Needs: Advocacy and Communications Cross-Cutting Systems Change Projects |
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| Project | Provider | Funding Period | Funding Allocation | Project Description |
|----------------|-------------------------------|---------------------------------|--------------------|--|
| Communications | RB Oppenheim Associates, Inc. | September 2024 – September 2025 | \$120,000 | This consulting agreement provides for website maintenance; general public relations outreach and ongoing support; annual event coordination and support of Developmental Disabilities Awareness Day; and Council outreach activities based on the five-year state plan; and statewide surveys, as needed. |

| Tri-Annual Period (dates) | Update Information |
|-----------------------------|--|
| October 2024 – January 2025 | <p>The focus this quarter was on promoting participation in the CRA, redesigning the Capitol Updates and the DD Day Toolkit.</p> <p>As of November 2024, the Our Care Matters videos have had over 300K video plays for almost 55K minutes!</p> |
| January 2025 – May 2025 | <p>Launched the Our Work Matters Podcast hosted by Chris Reeve. Redesigned Capitol Update to include easier to follow status graphics. Created/updated materials for DD Day including Connect with Us, Case Manager and Advocacy handouts. Continued monthly Connections newsletter. Pre- and post-DD Day publicity.</p> |

Public Policy Committee

Thursday, September 19, 2024

Roll Call:

- **State Plan Committee Members Present:**
 - Sarah Goldman (Committee Chair)
 - Caitlyn Clibbon
 - Enrique Escallon
 - Elly Hagen
 - Eddie Hall
 - Yolanda Herrera
 - Arizona Jenkins
 - Carla Mercer
 - Lauren Modawell
- **Absent State Plan Committee Members:**
 - Daniele McGill
 - Kali Wilson
- **Other Guest Council Members Present:**
 - Michael Sayih
 - Dr. Beth Boone
 - Charlotte Temple
 - Susan Nipper (APD)
 - Anna Cleveland (APD)
 - Tina Cordova
 - Denise Anderson
 - Tremayne Simpkins (VR)
 - Dr. Dennis Hart
- **Staff Present**
 - Valerie Breen
 - Dr. Sue Kabot
 - Kristin Vandagriff
 - Margaret Hooper
 - Chris Reeve
 - Monica Moya

9:00 a.m. Call to Order *Sarah Goldman, Chair*
Committee Chair Sarah Goldman called the meeting to order at 9:05am.

Margaret Hooper conducted the roll call to establish quorum with all but two committee members being noted as present. Chair Goldman reminded those attending the meeting who are not a Council member that they would need to wait until the public comment section on the agenda to ask questions or make comments.

9:05 a.m.– 9:10 a.m. Welcome & Introductions *Sarah Goldman, Chair*

Chair Goldman noted that this is the first meeting of the new Public Policy and Advocacy Committee, and asked members to introduce themselves. Chair Goldman noted that the Public Policy and Advocacy Committee is responsible for monitoring the legislative process and approving any modifications to the Council's legislative positions and any additional legislative

positions. It was denoted that in the absence of the Public Policy Committee, approval of Council legislative positions may be authorized by two or more of the following: Council Chair, Public Policy Committee Chair, and/or Executive Director.

9:10 a.m.–9:30 a.m.

Approval of Legislative Platform**
Our Care Matters

Margaret J. Hooper, Staff
Sarah Goldman, Chair

Chair Goldman indicated that Margaret Hooper would provide background on the factors that help the Committee decide on the Council's legislative work. Margaret Hooper shared FDDC success indicators via PowerPoint. Margaret Hooper denoted that the platform for 2025 was suggested to be named "Our Care Matters" to align with the robust story videos developed over the past year that highlight the importance of care for people with I/DD and their families. Strategies used by FDDC to make these decisions were summarized.

Chair Goldman read through slides that listed the bullets that are part of the narrative that describes the FDDC recommendations. She read the Access to Services slide noting that several pieces of legislation over the past 2 years have increased access to information and services and that the Council was glad to support the bills that included these improvements. Council recommendations in this area were shared. Chair Goldman read the Home- and Community-based Services Delivery Systems slide and noted that Home and Community- Based Services systems need to provide quality care in the right scope and quantity to support an individual's person-centered plan. The importance of monitoring managed care was noted. The importance of Consumer- Directed Care was also denoted with its advantages shared. With respect to behavioral services, Chair Goldman shared that the Council has contributed to enhancing behavioral services through the Council's research projects and program design. Council recommendations for this area were shared. Chair Goldman read the Aging Caregivers slide and noted that the new managed care pilot is blending iBudget and long-term care elder services and that it will be interesting to see how this will work. Council recommendations in this area were shared.

Chair Goldman opened the floor for members to provide input related to the platform. Yolanda Herrera provided input regarding concerns about the managed care pilot and noted the importance of education and being proactive in this area. Enrique Escallon noted similar concerns. Margaret Hooper reminded members that this will be an opportunity to monitor the system and provide input to assure it meets needs as intended. It was also noted that most of Florida's medical systems use a managed care format. Concerns over CDC+ not being in the managed care pilot is another component to watch as 4,500-5,000 individuals use this option, which can be especially helpful in meeting care in rural areas or for those with unique needs. Yolanda Herrera noted a concern regarding the appearance of FDDC being at the managed care pilot table, that some may misconstrue being at the table as support. Clarifying FDDC's purpose at the table may be useful in the future. Caitlyn Clibbon noted the LTC manage care consumer directed option is not equivalent to CDC+ and offers less flexibility. It was recommended to play close attention to any services not brought over to managed care, denoting the need to make it equivalent. She also noted that the dental issue right now is massive. NW Florida only has one dentist who will see people with I/DD with a yearlong waitlist. This resulted in a DRF client dying recently. Caitlyn Clibbon noted this should be a priority to push on the availability of dental health providers and assuring their training and work to change attitudes regarding serving this population. Arizona Jenkins said it is important to remember that not each person with I/DD is the same and it is important to keep the unique needs in mind and making sure there are services that take this into account.

Chair Goldman asked members if everyone has read the platform that is in the binder on pages 4 and 5. She then asked for a motion to approve the platform.

- Enrique Escallon made a motion to approve the platform.
- Yolanda Herrera provided a second.
- Discussion was offered, none presented.
- All voted in favor; motion carried.

9:30 a.m.–9:45 a.m.

Other Legislative Priorities**

Sarah Goldman, Chair
Margaret J. Hooper, Staff

Chair Goldman asked Margaret Hooper to discuss three other legislative issues that the Council has been working on, noting that members will be asked for approval to continue to move forward.

Transportation for individuals with I/DD

Margaret Hooper provided context on the Hart Plus voucher program denoting the impactful outcomes. The success of that program informed three other replication voucher programs. The Treasure Coast program was highlighted. It was noted that the Council desires to work on sustaining that program which would include looking at sustainable funding in the budget.

- Chair Goldman asked for a motion to approve working on transportation for individuals with I/DD.
- Enrique Escallon made a motion to approve the platform.
- Arizona Jenkins provided a second.
- Discussion was offered. Enrique Escallon provided suggestions on how data may be presented. Margaret Hooper denoted two studies which will be ready in January and noted that the Council can look at what has been done and share what FDDC has determined to find any gaps in data that may exist. One model was suggested where a first wave of funding would be allotted to those who have begun this work and then gradually provided to other regions of the state to bring it to scale.
- All voted in favor; motion carried.

Dental services for individuals with I/DD

A task force was noted to be working on dental services, and the Council has been asked to provide support on this critical issue. APD is looking for a contractor for the approved funds. Four main issues: Medicaid reimbursement rates are very low for providers, dentists aren't trained to work with I/DD population in Florida, Medicaid doesn't provide every service that people may need, and many people with I/DD need general anesthesia for services and hospitals are needed to do this and dental use of operating rooms are not always prioritized by hospitals. Caitlyn Clibbon noted recent discussions about looking for opportunities to complete dental work when already anesthetized for other procedures. Susan Nipper, APD representative, noted that money for dental services for those on the waiver is there and individuals would need to contact the agency. Disseminating information and putting it on the agency website was noted to be important. It was also denoted that there are people with I/DD not on the waiver who need dental services that must be remembered as well. Susan Nipper with APD noted that APD is actively working on access to dental services, \$11.5 million has been appropriated for this and APD is working to obtain a provider for these services for those on waiver and within the pre-enrollment category. Raising awareness for this offering was noted as a priority. For those with dental needs right now, it was noted to contact the APD main office or their local office to assure they are connected with critical timely dental care. Dr. Kabot noted her efforts around dental medicine at NOVA. She noted that most dentists do not receive training to work with those with I/DD. Eddie Hall asked APD

representative Susan Nipper about the process to obtain services for those who are not on Medicaid. Guidance was given.

- Chair Goldman asked for a motion to approve working on dental services for individuals with I/DD.
- Eddie Hall made a motion to approve the platform.
- Caitlyn Clibbon provided a second.
- Discussion was offered. None provided.
- All voted in favor; motion carried.

Budget concerns (e.g., pre-enrollment list)

Margaret Hooper denoted that this committee determines areas of the budget where additional focus should be placed and noted the need around the pre-enrollment category.

- Chair Goldman asked for a motion to approve asking for funding for the pre-enrollment list.
- Caitlynn Clibbon made a motion to approve the platform.
- Yolanda Herrera provided a second.
- Discussion was offered. Non provided.
- All voted in favor; motion carried.

9:45 a.m.–9:55 a.m.

Awards for Legislators**

Margaret J. Hooper, Staff

Chair Goldman asked Margaret Hopper to discuss legislative awards that the Council may want to start up again. Margaret Hooper shared that awards previously have provided a positive way to highlight legislative champions who support people with I/DD. Background on where awards have been presented as well as how to select champions was shared. Margaret Hooper asked for support to be able to purchase legislator awards of approx. \$200-\$300 each. Likely voting on those selected would occur through future Public Policy committee meetings. Caitlynn Clibbon supported the idea. Chair Goldman denoted the desire to award one Representative and one Senator annually.

- Chair Goldman asked for a motion to approve awards for legislators this year.
- Enrique Escallon made a motion to approve the platform.
- Caitlynn Clibbon provided a second.
- Discussion was offered
- All voted in favor; motion carried.

9:55 a.m.–10:00 a.m.

Public Comment

Sarah Goldman, Chair

Chair Goldman opened the floor for public comment. There was none.

10:00 a.m.

Meeting Adjourned

Sarah Goldman, Chair

Chair Goldman adjourned the meeting at 10:14am.

**** Items that require vote**

Public Policy Committee and Advocacy Committee
Meeting Minutes
Thursday, January 30, 2025
Orlando, Florida

Members Present: Sarah Goldman (Committee Chair), Caitlyn Clibbon, Enrique Escallon, Elly Hagen, Eddie Hall, Yolanda Herrera, Arizona Jenkins, Danielle McGill, Carla Mercer, Lauren Modawell and Kali Wilson

Members Absent: none

Other Guest Council Members Present: Michael Sayih, Dr. Beth Boone, Charlotte Temple, Susan Nipper (APD), Denise Anderson, Johana Valdivieso (VR)

Staff Present Valerie Breen, Sue Kabot, Kristin Vandagriff, Margaret Hooper, Chris Reeve, Monica Moye, Sarah Macaluso and Jennifer Chung

I. Call to Order

The meeting was called to order at 9:00am.

Committee Chair Goldman asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

Agenda approval:

Action Taken-Escallon made a motion to approve the agenda. Wilson seconded. The motion passed. There was no opposition or abstention.

II. Welcome & Introductions

Chair Goldman welcomed everyone and instructed everyone to open the meeting agenda in the Council book, behind the first Tab in pink, on Page 3.

III. Approval of September 19, 2024, minutes

Committee Chair Goldman asked if everyone had read the minutes, on Pages 4 and 5 in the Council binder, and gave the committee a minute to look them over again. The floor was opened for a motion.

Action Taken-Escallon made a motion to approve the minutes. Mercer seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Committee Chair Goldman noted that Margaret Hooper will give an update on the Council's legislative platform (printed on Pages 6 and 7 in the Council binder) as well as review work on transportation options and dental services. Margaret noted she has made presentations on the platform to Fellows, the annual PIP class, and will be conducting training for PIP Alumni. It was noted that the printed platform was available at the meeting and that they are posted on the website. There are three versions, an English version, Spanish version, and Plain Text version. Margaret discussed the 2025 FDDC legislative platform and the platform theme, "Our Care Matters" The three core areas are finding service, living at home and in the community, and aging caregivers. Margaret shared a breaking news issue related to possible threats to Medicaid funding, reminding attendees that Medicaid funds health insurances to approx. 1/5 of Florida's citizens as well as home and community-based services. Margaret noted it being important to share how important Medicaid is for individual lives regarding having a dialog with members of the U.S. Congressional Delegation. The federal process of budget allocation was discussed. Cost savings

are sometimes achieved through changing the federal match provided to states or considering block grant funding. This can be concerning as it can change the amount of federal money coming to a state. Frequency, scope, and eligibility for services can all change regarding cost savings. Additionally, capitated amounts can be instituted on the state or federal level. This can result in caps to care costs. This can especially impact on those with extensive costly care needs. The average care cost was noted to be \$55,000.

Advocates can remind policymakers about how Medicaid is used and its importance. Chair Goldman opened the floor to motion regarding providing materials and working on education related to Medicaid on the federal level.

Action Taken- Herrera made a motion to recommend educating congress on the importance of Medicaid for those with I/DD. Jenkins seconded. The motion passed. There was no opposition or abstention.

Margaret noted that there were not any bills to be discussed at this time. The Public Policy Committee meets about every two-week meeting structure will be determined later. Margaret noted that APD is beginning to have an online enrollment capacity. This will be important to help people access services. Regarding aging, waiver services recognizing moving up on the waiting list if the caregiver is 60. This implementation has begun.

Margaret provided an update on transportation efforts as well as dental care and the waiting list.

- **Transportation:** Margaret noted that one of the past voucher transportation programs FDDC has supported is losing grant funding. A work paper was provided to members regarding this effort. Danielle McGill noted the metropolitan planning organizations may have local grant funding to foster programs like this throughout individual counties. denoted a transportation guide she developed to support riders. Arizona Jenkins noted working with Transportation Disadvantaged and mentioned TD Tampa Bay and mentioned that it's a good service. A cross-county effort between Hillsborough and Tampa was noted. Margaret denoted that Hart Plus was the Hillsborough transportation voucher program the Council created, partnering with Yellow Cab. It demonstrated cost savings efficiencies, and the program was continued after the Council seed money. McGill reminded attendees that training for drivers is critical and cross-county continues to be one of the biggest issues. It was noted that the Advantage Ride model was like an Uber/Lift model. Director Breen noted that Advantage Ride is a strong model to look at how it can be leveraged and adopted in more counties. Margaret reminded attendees about the transportation legislation that passed last year which will explore two more studies that should be finished now. Margaret will look for those to share with the committee in the future. Margaret noted rural capacity being especially important moving forward. Eddie Hall noted that TD funding is based on usage and thus usage is critical. Increases will only occur if usage occurs.
- **Dental Care Services:** Margaret Hooper noted that \$11.5 million a year RFP will be put out by APD. Margaret has been working to bring many groups to the table regarding this issue. Training dentists and securing the right pay as well as understanding the different levels of care needed are all core issues. Margaret provided examples of serious emergent instances occurring in this area. Some dentists were noted to have a 4-year waiting list. Margaret Hooper noted working towards a comprehensive program that considers the varied levels of care and situations that present for the I/DD population in Florida. Escallon noted that even simple procedures required for this population may require more care.
- **Waiting List:** Margaret Hooper provided an update. APD recommended \$93 million to get people out of the pre-enrollment list. Margaret is waiting to see final recommendations and how many people received services last year from the past year's funding as it takes time to choose and find providers and implement approved care. This will continue to be

monitored in the coming year. She also noted that a distinction for APD that they serve those with I/DD may be especially critical to not have this population put into the larger disability category.

Update on Managed Care Task Force

Sarah Goldman gave an update to the Council on the business of the Managed Care Task Force that she Chairs. It was noted that on Nov. 12 the group last met on Zoom and heard from David Rogers and Carol Gormley regarding the pilot and the national Advancing States presentation on the Council's work. A copy of the presentation was included in the folder. Chair Goldman thanked members for their time working on this issue.

V. Consideration of proposed legislation or issues

Medicaid Redetermination

Chair Goldman noted many challenges related to people losing Medicaid coverage and a possible statutory fix which is being brought to the committee to talk through. Margaret Hooper noted that redetermination and unwinding has been causing massive issues. Some support coordinators have had between 70-100 clients removed from Medicaid in the last month. Hooper denoted that the language proposed by Arc of Florida would support resolution to these issues so that individuals and families are not experiencing these issues. Ex Parte Protection can be used for children under adult protection and this type of protection could be used for people with I/DD to prevent this incorrect removal from Medicaid. Compounding problems with IT services have exacerbated issues. Caitlyn Clibbon noted that DRF has continued to see these issues and sent letters to ACHA and APD without meaningful response to date. A request to meet and discuss solutions was put forward. Director Breen stated that the Council meeting tomorrow at 9am will include a meeting with Sec. Harris regarding this issue to work towards resolution. Danielle McGill asked if they are targeting working people with I/DD. It was noted that they are not. Arizona Jenkins noted that he was one of the individuals who was kicked off Medicaid. He noted that the problems he experienced upon renewal and waiting a long time for resolution. Dr. Sherman noted a similar issue with a long wait to get back on Medicaid.

Chair Goldman asked if everyone has read the Medicaid Redetermination issue paper handed out today. Margaret Hooper noted that we can support the concept of finding a fix vs. the language. Margaret Hooper has some reservations with the current language and that there could be some better language determined during session. The floor was open for a motion.

Action Taken- Clibbon made a motion to recommend the Medicaid Redetermination position to the full Council relating to pursuing a solution to this issue.

Jenkins seconded. The motion passed. There was no opposition or abstention.

VI. Bobbie Lake Family Leadership and Advocacy Award

It was reported that staff would like the Council to honor former Council member Bobbie Lake by considering an award for family members in his name. This award would be handled in a similar way to the Idelio Valdes Leadership and Advocacy award. His bio is included in the supplemental materials. Hooper noted that this type of award had been wanted for a long time.

Chair Goldman asked for a motion to recommend the Bobbie Lake Family Leadership and Advocacy Award to the full Council.

Action Taken- Wilson made a motion to recommend the Bobbie Lake Family Leadership and Advocacy Award to the full Council.

Escallon seconded. The motion passed. There was no opposition or abstention.

VII. Public Comment

Chair Goldman opened the floor for public comment. There was none.

VIII. Meeting Adjourned

Chair Goldman adjourned the meeting at 10:14am.

**Public Policy Committee and Advocacy Committee
Meeting Minutes
Friday, February 21, 2025
Legislative Zoom Meeting**

Members Present: Sarah Goldman (Committee Chair), Enrique Escallon, Elly Hagen, Eddie Hall, Yolanda Herrera, Arizona Jenkins, Carla Mercer, Lauren Modawell and Kali Wilson

Members Absent: Caitlyn Clibbon and Danielle McGill

Other Guest Council Members Present: none

Staff Present Valerie Breen, Sue Kabot, Margaret Hooper,

I. Call to Order

The meeting was called to order at 1:03 p.m.

Committee Chair Goldman asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

Agenda approval:

Action Taken-Wilson made a motion to approve the agenda. Modawell seconded. The motion passed. There was no opposition or abstention.

II. Welcome & Introductions

Chair Goldman welcomed everyone and reminded everyone about the meeting dates for the legislative public policy meetings. They are Fridays, February 28, March 21, April 11, April 25 and May 2 all at 1 pm.

Goldman explained that instead of recommending policy to the larger Council, the Committee is using the legislative decision-making tree to approve the policy. The Executive Director and the Chair as well as myself are here and we can approve our decisions.

III. Approval of January 30, 2025, minutes**

Committee Chair Goldman asked if everyone had read the minutes and gave the committee a minute to look them over again. Goldman asked for a motion.

Action Taken-Escallon made a motion to approve the minutes. Modawell seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Committee Chair Goldman noted that Margaret Hooper will give an update on the Council's legislative platform and APD updates. Hooper also reviewed work on transportation options and dental services. Hooper's update included the possibility of APD overseeing VR and Blind Services.

V. Consideration of proposed legislation or issues** *Margaret J. Hooper, Staff*

1) SB 460 - Student Elopement by Arrington

The bill would create a framework for addressing student elopement in Florida public schools by establishing various requirements for planning and response.

Identical Bill

HB 0345 Student Elopement by Eskamani

Action Taken-Mercer made a motion to support SB 460. Escallon seconded. The motion passed. There was no opposition or abstention.

2) SB 112 - Children with Developmental Disabilities by Harrell

This bill expands the scope and services of healthcare and educational programs for children with developmental disabilities in Florida. It amends the Cinotti Health Care Screening and Services Grant Program to include autism under eligible services and it creates the Early Steps Extended Option, extending eligibility for existing early intervention services until a child's fourth birthday. The bill mandates local program offices to prepare for children's transitions out of the Early Steps Program.

Identical Bills

HB 0591 Children with Developmental Disabilities by Maggard

Action Taken-Jenkins made a motion to support SB 112. Modawell seconded. The motion passed. There was no opposition or abstention.

3) HB 377 - Health Insurance Coverage for Individuals with Developmental Disabilities by Tant

The bill revises definitions related to health insurance coverage for individuals with developmental disabilities, impacting Medicaid options and law enforcement training. It updates the definition of "autism spectrum disorder" to match the most recent edition of the Diagnostic and Statistical Manual of Mental Disorders by the American Psychiatric Association.

Identical Bills

SB 0756 Health Insurance Coverage for Individuals with Developmental Disabilities by Burton

Action Taken-Modawell made a motion to support HB 377. Jenkins seconded. The motion passed. There was no opposition or abstention.

4) HB 447 - Disability History and Awareness Instruction by Salzman

This bill mandates comprehensive disability history and awareness instruction in schools, replacing prior optional guidelines with required educational content.

Identical Bills

SB 0540 Disability History and Awareness Instruction by Collins

Action Taken-Escallon made a motion to support HB 447. Hall seconded. The motion passed. There was no opposition or abstention.

5) HB 413 - Swimming Safety by Gossett-Seidman

This bill enhances water safety requirements and regulations for children, particularly those with autism, at public swimming areas and prohibits organizations from allowing children access to public bathing places or pools without swimming proficiency verification from a parent or legal guardian.

Similar Bills

SB 0568 Swimming Safety by Rodriguez

Action Taken-Escallon made a motion to support HB 413. Modawell seconded. The motion passed. There was no opposition or abstention.

6) SB 102 - Exceptional Student Education by Gaetz

A bill mandates the development and implementation of a workforce credential program for students with autism spectrum disorder by the Department of Education.

Similar Bills

HB 0127 Exceptional Student Education by Kendall

Action Taken-Modawell made a motion to support SB 102. Herrera seconded. The motion passed. There was no opposition or abstention.

VI. Public Comment

Chair Goldman opened the floor for public comment. There was none.

VII. Meeting Adjourned

Chair Goldman adjourned the meeting at 1:53 p.m.

**Public Policy Committee and Advocacy Committee
Meeting Minutes
Friday, February 28, 2025
Legislative Zoom Meeting**

Members Present: Sarah Goldman (Committee Chair), Enrique Escallon, Elly Hagen, Eddie Hall, Yolanda Herrera, Arizona Jenkins, Danielle McGill, Carla Mercer, Lauren Modawell and Kali Wilson

Members Absent: none

Other Guest Council Members Present: none

Staff Present Kristin Vandergriff, Sue Kabot, Margaret Hooper,

I. Call to Order

The meeting was called to order at 1:04 p.m.

Committee Chair Goldman asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

Agenda approval:

Action Taken-Mercer made a motion to approve the agenda with the addition of SB 412 and SB 1156. Modawell seconded. The motion passed. There was no opposition or abstention.

II. Welcome & Introductions

Chair Goldman welcomed everyone and reminded everyone about the meeting dates for the legislative public policy meetings. They are Fridays, March 21, April 11, April 25 and May 2 all at 1 pm.

III. Approval of February 21, 2025, minutes**

Committee Chair Goldman asked if everyone had read the minutes and gave the committee a minute to look them over again. Goldman asked for a motion.

Action Taken-Modawell made a motion to approve the minutes. Hall seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Margaret Hooper gave an update on the Council's legislative platform and APD updates. Hooper also reviewed work on transportation options and dental services. Hooper's update included the possibility of APD overseeing VR and Blind Services. The committee is remaining neutral on SB 1050

V. Consideration of proposed legislation or issues** *Margaret J. Hooper, Staff*

1) iBudget Waiver Employment incentive language to pay for staff up front to ensure direct provider availability was presented

Action Taken-Hagen made a motion to support the iBudget employment incentive language that would use existing federal funds for that purpose.

Mercer seconded. The motion passed. There was no opposition or abstention.

2) Updated Transportation voucher language was provided to offer grants to high performing transportation voucher programs

Action Taken-Jenkins made a motion to support the updated transportation. McGill seconded. The motion passed. There was no opposition or abstention.

3) SB 1156 - Home Health Aide for Medically Fragile Children Program by Harrell
This bill revises training and operational requirements for the Home Health Aide for Medically Fragile Children Program to improve care and coordination.

Action Taken-Modawell made a motion to support the updated transportation. Jenkins seconded. The motion passed. There was no opposition or abstention.

4) SB 412 - Repair of Motorized Wheelchairs by Smith (C)

This bill establishes requirements for the availability of motorized wheelchair repair resources under the "Motorized Wheelchair Right to Repair Act." The bill mandates that original equipment manufacturers (OEMs) provide documentation, parts, and tools necessary for diagnosing, maintaining, or repairing motorized wheelchairs, including updates, on fair and reasonable terms.

Action Taken-The Committee will remain neutral on this bill.

VI. Public Comment

Chair Goldman opened the floor for public comment. There was none.

VII. Meeting Adjourned

Chair Goldman adjourned the meeting at 1:54 p.m.

Public Policy Committee and Advocacy Committee
Meeting Minutes
Friday, March 21, 2025
Legislative Zoom Meeting

Members Present: Elly Hagen (Acting Chair), Arizona Jenkins, Danielle McGill, Caitlyn Clibbon, Carla Mercer, Lauren Modawell, Kali Wilson, Yolanda Herrera, Enrique Escallon, and Eddie Hall

Members Absent: Sarah Goldman (Committee Chair),

Other Council Members Present: none

Staff Present Kristin Vandergriff, Sue Kabot, Margaret Hooper, and Jennifer Chung

I. Call to Order

The meeting was called to order at 1:03 p.m.

Acting Chair Hagen asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

Agenda approval:

Action Taken-Mercer made a motion to approve the agenda with the addition of SB 1364. Herrera seconded. The motion passed. There was no opposition or abstention.

II. Welcome & Introductions

Acting Chair Hagen welcomed everyone and reminded everyone about the next meeting dates for the legislative public policy meetings. They are Fridays, April 11, April 25 and May 2 all at 1 pm.

III. Approval of February 28, 2025, minutes**

Acting Chair Hagen asked if everyone had read the minutes and gave the committee a minute to look them over again. Hagen asked for a motion.

Action Taken-Herrera made a motion to approve the minutes. Mercer seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Margaret Hooper gave an update on the Council's legislative platform and APD updates. Hooper also reviewed work on transportation. Hooper's update included a presentation on PCS1103.

Action Taken-Clibbon made a motion to support the addition of protective language to keep individuals on the waiver from being opted into the pilot. Herrera seconded. The motion passed. There was no opposition or abstention.

V. Consideration of proposed legislation or issues**

HB 257 - Exceptional Students and Video Cameras in Public Schools
by Chambliss, Tramont

The bill requires Florida public schools to install video cameras in specific classrooms and outlines related procedures. Hagen asked for a motion.

Action Taken-Herrera made a motion to support HB 257. Modawell seconded. The motion passed. There was no opposition or abstention.

SB 1006 - Video Cameras in Public School Classrooms by Calatayud

The bill amends Section 1003.574, Florida Statutes, to mandate modifications to the use of video cameras in self-contained classrooms in public schools. Hagen asked for a motion.

Action Taken-Modawell made a motion to support SB 1006. Escallon seconded. The motion passed. There was no opposition or abstention.

SB 1364 - Autism Spectrum Disorder Training for Law Enforcement Officers by Collins

The bill amends Florida Statutes to enhance the training of law enforcement officers for interactions with individuals with autism spectrum disorder.

Action Taken-Escallon made a motion to support SB 1364. Clibbon seconded. The motion passed. There was no opposition or abstention.

VI. Public Comment

Acting Chair Hagen opened the floor for public comment. There was none.

VII. Meeting Adjourned

Acting Chair Hagen adjourned the meeting at 1:57 p.m.

**Public Policy Committee and Advocacy Committee
Meeting Minutes
Friday, April 11, 2025
Legislative Zoom Meeting**

Members Present: Sarah Goldman (Committee Chair) Arizona Jenkins, Danielle McGill, Caitlyn Clibbon, Carla Mercer, Kali Wilson, Yolanda Herrera, Enrique Escallon, and Eddie Hall

Members Absent: Elly Hagen, Lauren Modawell

Other Council Members Present: none

Staff Present Kristin Vandergriff, Sue Kabot, Margaret Hooper, Valerie Breen and Jennifer Chung

I. Call to Order

The meeting was called to order at 1:03 p.m.

Chair Goldman asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

II. Welcome & Introductions

Chair Goldman welcomed everyone and reminded everyone about the next meeting dates for the legislative public policy meetings. They are on Friday, April 25 and May 2 at 1 pm.

Agenda approval:

Action Taken-Escallon made a motion to approve the agenda with the addition of HB 711. Herrera seconded. The motion passed. There was no opposition or abstention.

III. Approval of March 21, 2025, minutes**

Chair Goldman asked if everyone had read the minutes and gave the committee a minute to look them over again. Goldman asked for a motion.

Action Taken-Herrera made a motion to approve the minutes. Escalon seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Margaret Hooper gave an update on the Council's legislative platform and APD updates. Hooper also reviewed work on transportation. Hooper's update included a presentation on iBudget Consumer Directed Care and the Long-Term Care Person Directed option.

V. Updates and consideration of proposed legislation or issues**

Hooper gave an update on bills outlined in the Council's Capitol Update. Goldman presented HB 711 for consideration.

HB 711 - Spectrum Alert by Borrero, Campbell Co-Sponsors: Booth, Grow, Maggard, Partington

The bill establishes the Spectrum Alert in Florida to address safety risks associated with children who have Autism Spectrum Disorder (ASD) prone to wandering, particularly

leading to accidents or deaths from drowning and traffic accidents. The bill requires the Department of Law Enforcement to work with transportation, highway safety, lottery departments, and local law enforcement to create and implement the Spectrum Alert.

Identical Bill-SB 500 Spectrum Alert by Ávila

Action Taken-Jenkins made a motion to support HB 711. Herrera seconded. The motion passed. There was no opposition or abstention.

VI. Public Comment

Chair Goldman opened the floor for public comment. There was none.

VII. Meeting Adjourned

Chair Goldman adjourned the meeting at 1:58 p.m.

**Public Policy Committee and Advocacy Committee
Meeting Minutes
Friday, April 25, 2025
Legislative Zoom Meeting**

Members Present: Sarah Goldman (Committee Chair), Arizona Jenkins, Caitlyn Clibbon, Kali Wilson, Yolanda Herrera, Enrique Escallon, Lauren Modawell, Elly Hagen, and Eddie Hall

Members Absent: Danielle McGill and Carla Mercer

Other Council Members Present: none

Staff Present Kristin Vandergriff, Sue Kabot, Margaret Hooper, and Valerie Breen

I. Call to Order

The meeting was called to order at 1:04 p.m.

Chair Goldman asked Margaret Hooper to conduct a roll call. Quorum was established. Attendees were reminded that only committee members can vote. Attendees were also reminded that anyone attending the meeting who is not a Council member will need to wait until the public comment section of our agenda to ask questions or make comments.

II. Welcome & Introductions

Chair Goldman welcomed everyone and reminded everyone that the next meeting date for the legislative public policy meeting is on Friday May 2 at 1 pm.

Agenda approval:

Action Taken-Modawell made a motion to approve the agenda with the addition of a legislative award discussion. Escallon seconded. The motion passed. There was no opposition or abstention.

III. Approval of April 11, 2025, minutes**

Chair Goldman asked if everyone had read the minutes and gave the committee a minute to look them over again. Goldman asked for a motion.

Action Taken-Escallon made a motion to approve the minutes. Modawell seconded. The motion passed. There was no opposition or abstention.

IV. Update on the FDDC 2025 Legislative Platform

Margaret Hooper gave an update on the Council's legislative platform and APD updates. Hooper also reviewed work on transportation. Hooper's update included a discussion of legislative awards.

V. Updates and consideration of proposed legislation or issues

Hooper gave an update on bills outlined in the Council's Capitol Update.

VI. Public Comment

Chair Goldman opened the floor for public comment. There was none.

VII. Meeting Adjourned

Chair Goldman adjourned the meeting at 1:55 p.m.



CAPITOL UPDATE

April 28, 2025



April 28, 2025 - Volume 25, Issue 10

Florida's Legislative Budget Conference

It is time for Florida's budget conference process: that is an important phase in the state's annual budget cycle. Differences between the House and Senate budget proposals are reconciled. This process leads to an agreement for one single, unified state budget called the General Appropriations Act (GAA). This budget will fund state operations for the upcoming fiscal year. After agreeing to general budget allocations, the Speaker of the House and the Senate President will appoint conference committees composed of legislators from both chambers. Usually these "conferees" include the Appropriations Chairs and subcommittee members specializing in various budget areas (e.g. Health and Human Services, Agriculture, Criminal Justice). These conference committees are tasked with working through the differences in these specific sections of the budget.

Senate and House committee members submit offers to resolve differences within their assigned areas. Negotiations typically involve back-and-forth exchanges of offers and counter offers that focus on funding levels, policy directives, and project allocations. If subcommittees cannot resolve certain issues, these are "bumped" to the full Appropriations Chairs and the Speaker of the House and the Senate President. Once all differences are resolved, the finalized conference report is prepared as the General Appropriations Act (GAA).

As Florida's 2025 regular legislative session nears its May 2, 2025, deadline, lawmakers are preparing for the possibility of going into overtime, with no general budget agreement yet in place. Florida's constitution states that passing a budget is the only required task for the Legislature. To finish on time, lawmakers must have a final budget printed on members' desks by Tuesday, April 29 allowing for the mandatory 72-hour "cooling-off" period before the budget can be passed and sent to Governor Ron DeSantis for signature. If that deadline isn't met, the Legislature must extend the session or call a special session before the start of the new fiscal year on July 1, 2025.

The Florida Developmental Disabilities Council is supporting funding for individuals to transition from the iBudget pre-enrollment or waiting list and funding to ensure that there are providers in place to assist those new enrollees. The Council is also supporting funding for the dual diagnosis mobile treatment pilot and funding for the Innovative Services grant through the Transportation Disadvantaged Trust Fund.

Below are bills the Council supports or tracks. Keep in mind that bills usually must pass through three or four committees before getting to the full House or Senate chambers. Once in a chamber, bills are read three times before final passage and then sent to the other chamber for acceptance to end up with one bill to send to the Governor.

When the Governor receives a bill, he can sign it, let it become law without his signature, or veto the bill. The Legislature can overturn a veto the next time they meet by a two-thirds vote of both chambers.

Please click on bill links to track a bill's full journey through the legislative process. The information on the status of bills is current as of Thursday, April 24, 2025.

See the FDDC Legislative Platform

CAPITOL UPDATE: KEY



New for 2025: next to each bill, you will see a graphic that indicates the stage at which the bill is in the legislative process.

Important Bills to Watch



Bill Introduced



[SB 460-Student Elopement by Arrington](#) **Summary of Original Filed Text - 02/03/25**

The bill would create a framework for addressing student elopement in Florida public schools by establishing various requirements for planning and response.

The bill defines "elopement" as the act of a student with disabilities leaving supervision and mandates each public school to set up a School Staff Assistance for Emergencies (SAFE) team and a comprehensive elopement plan.

The bill specifies that the school principal and assistant principal, along with at least five other appointed members, will constitute the SAFE team. This team is responsible for developing,

updating, and enacting the elopement plan.

The elopement plan would include detailed procedures for immediate actions following an elopement, a structured search plan including a search grid of critical areas, and a communication strategy among all school personnel, security, and law enforcement.

There is directive language that the elopement plan be submitted annually to the district school board and authorizes the State Board of Education to adopt rules to implement the provisions effectively.

Identical Bill

[HB 0345 Student Elopement by Eskamani](#)
Passed first committee



Senate Floor



[SB 112-Children with Developmental Disabilities by Harrell](#)

Summary of Original Filed Text - 02/05/25

This bill expands the scope and services of healthcare and educational programs for children with developmental disabilities in Florida.

It amends the Cinotti Health Care Screening and Services Grant Program to include autism under eligible services and it creates the Early Steps Extended Option, extending eligibility for existing early intervention services until a child's fourth birthday.⁷³

The bill mandates local program offices to prepare for children's transitions out of the Early Steps Program.

This bill establishes guidelines and funding priorities for startup grants managed by the University of Florida Center for Autism and Neurodevelopment aimed at supporting schools and summer programs for children with autism. It directs the Commissioner of Education to review and report on educational curricula for disabilities, enhancing training for professionals with a focus on supporting students with autism.

Identical Bill

[HB 0591 Children with Developmental Disabilities by Maggard](#)

House floor



Bill Introduced



[HB 377-Health Insurance Coverage for Individuals with Developmental Disabilities by Tant](#)

Summary of Original Filed Text - 02/04/25

The bill revises definitions related to health insurance coverage for individuals with developmental disabilities, impacting Medicaid options and law enforcement training. It updates the definition of "autism spectrum disorder" to match the most recent edition of the Diagnostic and Statistical Manual of Mental Disorders by the American Psychiatric Association. The bill changes the definition of "eligible individual" to expand criteria beyond age restrictions, focusing on the diagnosis of a developmental disability without specifying the age at diagnosis.

The bill reenacts specific statutes to adapt to the updated definitions impacting optional Medicaid services and law enforcement training regarding autism spectrum disorder and retains clauses regarding the adjustment of services based on budgetary constraints and the need for legislative approval for the implementation of new Medicaid services.

Identical Bill

[SB 0756 Health Insurance Coverage for Individuals with Developmental Disabilities by Burton](#)

Senate floor

[HB 447 - Disability History and Awareness Instruction by Salzman](#)

Summary of Original Filed Text - 02/06/25

This bill provides an option for comprehensive disability history and awareness instruction in schools, replacing prior optional guidelines with required educational content.



House Floor

The bill designates the act as the "Evin B. Hartsell Act." It requires that for a two-week period, students receive intensive instruction on individuals with disabilities, including disability history and the disability rights movement. The instructional content across educational levels includes:

- Grades K-3: Conversations on bullying and activities teaching about physical disabilities.
- Grades 4-6: Provides information and activities related to autism spectrum disorder.
- Grades 7-9: Includes content and activities about hearing impairments.
- Grades 10-12: Focuses on different types of learning and intellectual disabilities, with practical activities to illustrate these conditions.

The bill allows district school boards to collaborate with the Evin B. Hartsell Foundation for curriculum development.

Identical Bill

[SB 0540 Disability History and Awareness Instruction by Collins](#)
Senate floor



Bill Introduced

[HB 413 - Swimming Safety by Gossett-Seidman](#)

Summary of Original Filed Text - 02/05/25

This bill enhances water safety requirements and regulations for children, particularly those with autism, at public swimming areas and prohibits organizations from allowing children access to public bathing places or pools without swimming proficiency verification from a parent or legal guardian.

The bill requires organizations to provide U.S. Coast Guard-approved personal flotation devices (for public bathing places and pools) to children identified as non-swimmers or at-risk and allows organizations to refuse water access to children without the required documentation

and penalizes organizations for non-compliance by allowing disciplinary actions, including administrative penalties.

This bill includes changes to the "Residential Swimming Pool Safety Act," now part of a broader "Swimming Pool and Public Water Safety Act," reinforcing safety barriers and pool standards.

Similar Bill



Senate Floor



[SB 102 - Exceptional Student Education by Gaetz](#)

Summary of Original Filed Text - 12/17/24

A bill mandates the development and implementation of a workforce credential program for students with autism spectrum disorder by the Department of Education. It mandates the Department of Education to develop and implement a workforce credential program by January 31, 2026, specifically designed for students with autism spectrum disorder to aid in securing employment upon graduation.

Requires the program to allow students to earn badges that demonstrate the acquisition of skills needed by employers, with each badge representing five discrete skills, including workplace safety.

Specifies that the validation of each badge must be done by two members of the instructional staff who specialize in exceptional student education. SB 102 directs the Department of Education to produce an annual report from 2026 through 2030, which includes details on the badges offered, data on post-graduation employment, student participation rates, and other relevant outcome data.

Similar Bill

[HB 0127 Exceptional Student Education by Kendall](#)

House floor



Senate Floor



[SB 1156 - Home Health Aide for Medically Fragile Children Program by Harrell](#)

Summary of Original Filed Text - 02/25/25

This bill revises training and operational requirements for the Home Health Aide for Medically Fragile Children Program to improve care and coordination.

The bill specifies family caregiver training to include minimum hours of theoretical instruction, skills tailored to the child's care needs and directed clinical training. It also establishes a Medicaid fee schedule for home health aides at a minimum rate of \$25 per hour with a daily cap of 12 hours per child, requiring justification for additional hours.

The bill mandates a swift federal approval process for Medicaid waivers or amendments to include private duty nursing and home health providers in the program and exempt home health aide income from public assistance eligibility considerations.

Lastly, the bill requires an annual program assessment detailing caregiver satisfaction, support needs, hospitalization rates, adverse incidents, and comparison data between home health aides and registered or licensed nurses.

Similar Bills

[HB 1529 Home Health Aide for Medically Fragile Children Program by Tramont](#)
House floor



[SB 412 - Repair of Motorized Wheelchairs by Smith \(C\)](#)

Summary of Original Filed Text - 01/30/25

This bill establishes requirements for the availability of motorized wheelchair repair resources under the "Motorized Wheelchair Right to Repair Act."

The bill mandates that original equipment manufacturers (OEMs) provide documentation, parts, and tools necessary for diagnosing, maintaining, or repairing motorized wheelchairs, including updates, on fair and reasonable terms.

The purpose of the bill is to offer more options for wheelchair repair and the bill stipulates that any contractual provision attempting to waive or limit OEM obligations under this act are void and enforces violations of these provisions under the Florida Deceptive and Unfair Trade Practices Act.

Similar Bills

[HB 0311 Repair of Motorized Wheelchairs by Eskamani](#)
House floor

[SB 1050 - Agency for Persons with Disabilities by Bradley](#)

Summary of Original Filed Text - 02/24/25

The Committee substitute of this bill enhances services for individuals with developmental disabilities through several key provisions and requirements targeting state agencies and Medicaid programs. It removed the Vocational Rehabilitation and Blind Services merger to APD



Senate Floor

and expands the developmental disabilities managed care pilot to cover the whole state.

- There is language that requires the Agency for Persons with Disabilities to post quarterly reconciliation reports on its website within five days of submission to other bodies.
- The bill includes requirements for an online application system for crisis enrollment under the developmental disabilities services and eliminates the removal of individuals from pre-enrollment due to inability to contact or verify eligibility.
- The "Adult Pathways Home and Community-based Services Medicaid waiver program" is established to cater to adults with developmental disabilities, setting out specific eligibility, disenrollment criteria, and types of services

covered.

- A Statewide Family Care Council is introduced and delineates its duties, member compositions, and operational protocols, including interaction with local family care councils.
- Procedures are modified and benefits extended under an established pilot program for individuals with developmental disabilities, specifying voluntary enrollment, eligibility, provider qualifications, and required assessments.

Similar Bill

[HB 1103 Agency for Persons with Disabilities by Kincart Jonsson](#)

Passed first committee as a committee substitute that removes the Vocational Rehabilitation and Blind Services merger to APD and expands the developmental disabilities managed care pilot to cover the whole state.

House Floor



House Floor

[HB 257 - Exceptional Students and Video Cameras in Public Schools by Chambliss, Tramont](#)

Summary of Original Filed Text - 01/27/25

The bill mandates that each public and charter school with self-contained classrooms must install video cameras and stipulates that cameras must monitor and record all classroom areas, excluding restrooms and changing areas.

The bill specifies that recordings must be retained for a minimum of three months or until all associated investigations and legal actions are resolved and designates school principals as custodians of the video cameras and recordings, detailing protocols for viewing and handling recordings.

Immediate family and legal authorities are allowed to view recordings for

Similar Bill

[SB 1006 - Video Cameras in Public School Classrooms by Calatayud](#)



House Floor



[HB 299 - Elevator Accessibility Requirements by Woodson](#)

Summary of Original Filed Text - 01/29/25

The bill amends Florida Statutes to specify requirements for support rails in elevator car interiors for accessibility.

The bill would require that:

- Each elevator car must have at least one continuous support rail.
- The support rail must be between 31 and 33 inches high from the floor, not exceeding 2 1/2 inches in diameter.
- The minimum length of the support rail must be 42 inches.

Identical Bill

[SB 0960 Elevator Accessibility Requirements by Bernard](#)

Passed first committee



House Floor



[HB 711 - Spectrum Alert by Borrero, Campbell CoSponsors: Booth, Grow, Maggard, Partington](#)

Summary of Original Filed Text - 02/19/25

The bill establishes the Spectrum Alert in Florida to address safety risks associated with children who have Autism Spectrum Disorder (ASD) prone to wandering, particularly leading to accidents or deaths from drowning and traffic accidents. The bill requires the Department of Law Enforcement to work with transportation, highway safety, lottery departments, and local law enforcement to create and implement the Spectrum Alert. The bill also includes the following:

- Instructs these departments to collaboratively develop a training program and alert system compatible with existing emergency systems, focusing on improving responses to missing ASD children incidents.
- Mandates the implementation of crisis intervention training for law enforcement to better manage interactions with ASD children.

- Specifies that policies and procedures be set for handling reported missing ASD children, including quick dissemination of information and informing relevant emergency and law enforcement personnel.
- Stipulates increased awareness efforts to understand autism-related elopement risks and strengthen community support for ASD children.

Identical Bill

[SB 0500 Spectrum Alert by Ávila](#)

House floor



House Floor



[HB 877 - School Readiness Program by Bartleman, Trabulsy Co-Sponsors: Campbell, López, J., Partington](#)

Why I Filed This Bill (by Representative Bartleman): This bill addresses the challenges children with disabilities face in early childhood education. Logan, a child with autism, was expelled from six different preschools because they could not accommodate his needs. Without consistency and proper support, children like Logan face significant barriers to early education. The expulsion rate in early education is three times higher than K-12 combined. Students with disabilities must be provided a stable learning environment with teachers trained to meet their unique needs. Currently, early learning providers are paid an increased

rate from ELCs for enrolling a student with a disability. Providers receive these additional dollars as an incentive; however, there is no training requirement for teachers. This bill will require training for all providers who choose to take advantage of this increased rate. This bill incentivizes early learning providers to accommodate students with special needs and equips teachers with the training necessary to manage these students so that they can maintain a classroom conducive to all learners. It also requires training for autism screenings and increases access to after-school programs. Early identification is key, and it is vital that every child is provided with a strong foundation.

Summary of Original Filed Text - 02/21/25

This bill

- Reassigns participation priority in the School Readiness Program by emphasizing children from economically disadvantaged working families, at-risk children, and children mandating special accommodations validated by qualified professionals.
- Introduces specific requirements for children with special needs, including a validated IEP, individual family support plan, diagnosed special need, or determined accommodations.
- Establishes eligibility for additional funding for providers caring for children meeting enhanced criteria, including those under subsection (6) of revised statute.
- Creates a special needs differential allocation which school readiness providers can access if they meet program standards, undertake specific training, and fulfill ongoing educational requirements by July 1, 2027.

Identical Bill

[SB 1102 School Readiness Program by Calatayud](#)

Senate floor



House Floor

[HB 1227 - Medicaid Enrollment for Permanently Disabled Individuals by Tramont Co-Sponsors: Bartleman, Melo, Tant CS Sponsors: Health & Human Services Committee, Health Care Facilities & Systems Subcommittee](#)

Summary of Committee Substitute Text (C2) - 04/16/25

This bill establishes continuity of Medicaid coverage for permanently disabled individuals during redeterminations. Highlights of this bill include the following.

- The bill presumes continued eligibility for individuals initially determined disabled who are receiving Medicaid services like institutional care, hospice, or specific home and community-based services unless their disability or economic status changes.
- The bill requires the Agency for Health Care Administration to continue payments for these services throughout the redetermination process unless there is a reported change in disability or financial status.
- There is a requirement that recipients or their caregivers notify the agency and the Department of Children and Families of any changes impacting eligibility, triggering a possible redetermination of continued coverage.
- The term “permanently disabled” is defined as a person previously determined disabled whose disability is certified by a licensed physician as permanent.
- The bill directs the agency to seek federal authorization to exempt qualified permanently disabled individuals from annual redeterminations and to develop a notification process with the Department of Children and Families.

Identical Bill

[SB 7032 Medicaid Enrollment for Permanently Disabled Individuals by Appropriations Committee on Health and Human Services](#)

Senate floor



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FINANCE COMMITTEE MEETING
Thursday, May 1, 2025

Zoom Meeting
<https://fddc.zoom.us/j/84209206709>

Meeting ID: 842 0920 6709
Passcode: 653012
5:00 p.m. – 6:00 p.m.

OUR MISSION

“To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities”.

| | | |
|------------------------------|---|---|
| 5:00 p.m. | Call to Order Welcome & Roll Call | <i>Dennis Hart, Chair</i> |
| 5:10 p.m. | Adopt the Agenda | <i>Dennis Hart, Chair</i> |
| 5:10 p.m. – 5:15 p.m. | Approval of Minutes (A) Minutes for 1/21/2025** | <i>Dennis Hart, Chair</i> |
| 5:15 p.m. – 5:30 p.m. | Review/Discussion of Financials (B) Budget vs Actual (C) Profit and Loss, by Class | <i>Allison Harrell, CFO</i> |
| 5:30 p.m. – 5:45 p.m. | Proposed modification – Funding and Budget Policy** (D) Budget/Funding Policy | <i>Dennis Hart, Chair</i> |
| 5:45 p.m. – 6:00 p.m. | Review/Discussion | <i>Dennis Hart, Chair</i> <i>Valerie Breen, CEO</i> <i>Monica Moye, COF</i> |
| 6:00 p.m. | Public Comment | <i>Dennis Hart, Chair</i> |
| | Meeting Adjourned | |

**** Items that require vote**

Florida Developmental Disabilities Council
Finance Committee Meeting
Minutes
Tuesday January 21, 2025
Via ZOOM

Members Present: Dr. Dennis Hart, Chair; Enrique Escallon; Sarah Goldman, Caitlyn Clibbon; Kali Wilson.

Members Absent: Charlotte Temple, Andrea Gary

Other Council Members Present: Carla Mercer, Elly Hagen, Yolanda Herrera

Staff Present: Valerie Breen, Sue Kabot, Monica Moye, and Sarah Macaluso

Guests Present: Allison Harrell (Thomas Howell Ferguson), Chris Sawchyn (Thomas Howell Ferguson) and Danielle Towery (James Moore HR Solutions)

The meeting was called to order by Chair Hart.

I. Approval of Agenda

Action Taken: Clibbon made a motion to adopt the agenda as presented. Escallon seconded. Hart asked for discussion, none occurred. Motion passed unanimously.

II. Approval of the Minutes

Action Taken: Escallon made a motion to adopt the minutes. Goldman seconded. Hart asked for discussion, none occurred. Motion passed unanimously.

III. Finance Presentation

Hart asked Allison Harrell of Thomas Howell Ferguson (THF) to present to the committee. Harrell reviewed both the Budget vs. Actual and Profit & Loss documents.

Harrell noted that the process for tracking profit and loss analysis will be streamlined in 2025. Accounts payable balances versus true expenses will be able to be viewed. Condensed income statements and expenses will be allocated each year.

Harrell noted that going forward, activity per grant will be able to be viewed. Each grant has a 3-year period of availability. THF can run a report for all 3 years combined to see how much is spent for each line item. This is to ensure funds are not left on the table.

Harrell noted a potential process change for the Executive Director's travel. Harrell noted that once the budget is allocated for travel, pre-authorizations, authorizations, and approvals are deemed unnecessary. If the Executive Director stays within the confines of the travel budget and policy, approval should not be necessary. Harrell recommends this streamlined process and notes this is a typical process for a budgeted entity, such as FDDC. Escallon asked if this applies to all council members; Harrell replied that once the budget is approved and travel costs for the year are anticipated, this process should be adopted across the board. Breen noted that for council members, FDDC receives requests for travel other than council meetings. Breen

noted that there is a limited amount of funds for council members. A process/mechanism will be needed to sort the various travel requests. Breen noted that we are looking to streamline the process with staff travel as well.

Action Taken: Escallon made a motion to recommend adoption of the budget vs. actual to the full Council. Wilson seconded. Hart asked for discussion, none occurred. Motion passed unanimously.

IV. Public Comment

There was none.

Hart adjourned the meeting at 4:30 p.m.

DRAFT

Florida Developmental Disabilities Council, Inc.

Budget Vs. Actual

October 2024 - March 2025

| | TOTAL | | |
|--|-----------------------|---------------|--------------|
| | ACTUAL | BUDGET | % OF BUDGET |
| Income | | | |
| 4100 Grant - ADD | | | |
| 4102 Grant - NACDD - Bridging the Gap | 10,000.00 | | |
| Total 4100 Grant - ADD | 10,000.00 | | |
| 4101 Grant ADD | 3,099,061.30 | | |
| Total Income | \$3,109,061.30 | \$0.00 | 0.00% |
| GROSS PROFIT | \$3,109,061.30 | \$0.00 | 0.00% |
| Expenses | | | |
| 2023 Administrative | | | |
| 23 Telephone | 284.64 | | |
| Total 2023 Administrative | 284.64 | | |
| 2024 Administrative | | | |
| 24 Computer Expenses | 435.00 | | |
| 24 Dues | 169.00 | | |
| 24 Employee Morale | 93.92 | | |
| 24 Legal Fees | 6,014.65 | | |
| 24 Office Supplies & Expenses | 898.69 | | |
| 24 Bank Charges | 246.21 | | |
| Total 24 Office Supplies & Expenses | 1,144.90 | | |
| 24 Payroll | | | |
| 24 Benefits | | | |
| 24 Retirement | 1,639.98 | | |
| Total 24 Benefits | 1,639.98 | | |
| Total 24 Payroll | 1,639.98 | | |
| 24 Postage | 260.73 | | |
| 24 Professional Fees | | | |
| 24 Contract | | | |
| 24 Consultant | 29,976.24 | | |
| 24 HR Consultant | 5,059.98 | | |
| Total 24 Contract | 35,036.22 | | |
| Total 24 Professional Fees | 35,036.22 | | |
| 24 Rent | | | |
| 24 Building Rent | 7,196.81 | | |
| Total 24 Rent | 7,196.81 | | |
| 24 Telephone | 285.76 | | |
| 24 Travel Allocation | 19.14 | | |
| 24 Travel Council | 1,705.94 | | |
| 24 TVL/C DD Council Mtg | 33,767.49 | | |
| Total 24 Travel Council | 35,473.43 | | |
| Total 2024 Administrative | 87,769.54 | | |
| 6000 25 Program Expense | | | |

Florida Developmental Disabilities Council, Inc.

Budget Vs. Actual

October 2024 - March 2025

| | TOTAL | | |
|---|-------------------|---------------------|----------------|
| | ACTUAL | BUDGET | % OF BUDGET |
| 6010 25 Access to Services | | | |
| 6011 25 ASK Steering Committee & Research | 49,280.98 | 197,975.72 | 24.89 % |
| 6012 25 ASK Personas & Journey Mapping Expert Contact Dev | 141,151.40 | 150,000.00 | 94.10 % |
| Total 6010 25 Access to Services | 190,432.38 | 347,975.72 | 54.73 % |
| 6020 25 Home & Comm Based Del System | | | |
| 6021 25 Best Practices in Case Management | 164,344.00 | 226,000.00 | 72.72 % |
| 6022 25 Researching Provider Solutions | | 252,000.00 | |
| 6023 25 Measuring Service Quality | | 225,000.00 | |
| 6024 25 Behavioral Therapist Shortage | | 300,000.00 | |
| 6025 25 Dual Diag Targeted Disparity | 24,098.83 | 229,337.55 | 10.51 % |
| 6026 25 First Responder Training | 35,641.70 | 149,990.00 | 23.76 % |
| Total 6020 25 Home & Comm Based Del System | 224,084.53 | 1,382,327.55 | 16.21 % |
| 6030 25 Aging Caregivers TF | | | |
| 6031 25 Aging Caregivers Roadmap Initiative | 15,112.50 | 125,027.00 | 12.09 % |
| 6032 25 Researching Aging Caregiving Families | 40,114.22 | 151,900.00 | 26.41 % |
| Total 6030 25 Aging Caregivers TF | 55,226.72 | 276,927.00 | 19.94 % |
| 6040 25 Self Advocacy Leadership | | | |
| 6041 25 Partners In Policymaking Coordinator | 32,500.00 | 65,000.00 | 50.00 % |
| 6042 25 SAL TF Travel/Supports | 96,671.34 | 150,000.00 | 64.45 % |
| 6043 25 Florida SAND | 62,159.44 | 315,428.00 | 19.71 % |
| 6044 25 Partners In Policy Curriculum Strand Travel | 47,536.00 | 150,000.00 | 31.69 % |
| Total 6040 25 Self Advocacy Leadership | 238,866.78 | 680,428.00 | 35.11 % |
| 6050 25 Broad Systems Change | | 9,800.11 | |
| 6060 25 Advocacy & Communications | | | |
| 6061 25 Communications | 48,295.90 | 103,619.00 | 46.61 % |
| 6062 25 State Plan Goal Related (Easy Read, Sp Trans) | 4,177.09 | 115,825.00 | 3.61 % |
| 6063 25 Public Policy / Legislative Education | 16,993.46 | 40,000.00 | 42.48 % |
| Total 6060 25 Advocacy & Communications | 69,466.45 | 259,444.00 | 26.78 % |
| Total 6000 25 Program Expense | 778,076.86 | 2,956,902.38 | 26.31 % |
| 7000 PROGRAM EXPENSE ADMIN | | | |
| 2023 Expense | | | |
| 23 Aging | 33,656.67 | | |
| 23 Cross Cutting | 7,500.00 | | |
| 23 Home & Comm Based Del System | 193,424.84 | | |
| Total 2023 Expense | 234,581.51 | | |
| 2024 Expense | | | |
| 24 Access to Services | 123,649.74 | | |
| 24 Communications | 256.00 | | |
| 24 Task Force Expenses | | | |
| 24 HCS TF | 51,686.12 | | |
| 24 Self Advocacy Leadership TF | | | |
| 24 Partners In Policymaking | 52,406.82 | | |

Florida Developmental Disabilities Council, Inc.

Budget Vs. Actual

October 2024 - March 2025

| | TOTAL | | |
|---|-------------------|---------------------|----------------|
| | ACTUAL | BUDGET | % OF BUDGET |
| 24 SAL TF Travel | 365.28 | | |
| Total 24 Self Advocacy Leadership TF | 52,772.10 | | |
| Total 24 Task Force Expenses | 104,458.22 | | |
| Total 2024 Expense | 228,363.96 | | |
| Total 7000 PROGRAM EXPENSE ADMIN | 462,945.47 | | |
| 9000 2025 Administrative | | | |
| 9001 25 Computer Expenses | 42,102.93 | 93,000.00 | 45.27 % |
| 9002 25 Dues | 384.60 | 22,000.00 | 1.75 % |
| 9003 25 Education/Training | 2,450.00 | 8,000.00 | 30.63 % |
| 9004 25 Insurance - General | 11,532.00 | | |
| 9100 25 D & O and Employment Liability | | 5,087.00 | |
| 9200 25 Property - Crime - General/Professional Liability | | 6,128.00 | |
| 9300 25 Umbrella | | 1,284.00 | |
| 9500 25 Cyber Security | | 1,500.00 | |
| 9600 25 State of FL Policies | | 401.00 | |
| Total 9004 25 Insurance - General | 11,532.00 | 14,400.00 | 80.08 % |
| 9005 25 Office Supplies & Expenses | | | |
| 9201 25 Bank Charges | 733.13 | 2,700.00 | 27.15 % |
| 9202 25 Supplies & Expense | 3,881.97 | 7,300.00 | 53.18 % |
| Total 9005 25 Office Supplies & Expenses | 4,615.10 | 10,000.00 | 46.15 % |
| 9006 25 Payroll | | | |
| 9602 25 Wages | 487,357.45 | 1,045,408.71 | 46.62 % |
| 9603 25 Payroll Taxes | 37,425.61 | 79,839.97 | 46.88 % |
| 9604 25 Workers Comp Insurance | | 2,200.00 | |
| Total 9006 25 Payroll | 524,783.06 | 1,127,448.68 | 46.55 % |
| 9007 25 Benefits | | | |
| 9701 25 AFLAC | 4,533.48 | 16,640.00 | 27.24 % |
| 9702 25 Dental Insurance | 539.79 | 3,100.00 | 17.41 % |
| 9703 25 Health Insurance | 12,429.58 | 73,000.00 | 17.03 % |
| 9704 25 Retirement | 19,954.40 | 67,000.00 | 29.78 % |
| 9705 25 STD, LTD and Life | 1,957.73 | 7,500.00 | 26.10 % |
| Total 9007 25 Benefits | 39,414.98 | 167,240.00 | 23.57 % |
| 9008 25 Professional Fees | | | |
| 9801 25 Legal Fees | 5,910.75 | 22,000.00 | 26.87 % |
| 9802 25 Audit & 990 | | 22,000.00 | |
| 9803 25 HR Consultant | 12,500.00 | 29,000.00 | 43.10 % |
| 9804 25 Consultant | 107,977.81 | 302,749.94 | 35.67 % |
| 9805 25 Accounting | 34,201.00 | 77,000.00 | 44.42 % |
| Total 9008 25 Professional Fees | 160,589.56 | 452,749.94 | 35.47 % |
| 9009 25 Postage | 598.91 | 3,500.00 | 17.11 % |
| 9010 25 Employee Morale | 1,154.86 | 1,250.00 | 92.39 % |
| 9020 25 Rent | | | |

Florida Developmental Disabilities Council, Inc.

Budget Vs. Actual

October 2024 - March 2025

| | | TOTAL | |
|---|-----------------------|-------------------------|-----------------|
| | ACTUAL | BUDGET | % OF BUDGET |
| 9021 25 Building Rent | 49,118.72 | 87,900.00 | 55.88 % |
| 9022 25 Equipment Rental | 2,988.43 | 4,900.00 | 60.99 % |
| Total 9020 25 Rent | 52,107.15 | 92,800.00 | 56.15 % |
| 9023 25 Telephone | 2,820.07 | 5,900.00 | 47.80 % |
| 9060 25 Travel Allocation | | | |
| 9061 25 Council Meeting/Other - Members & Staff | 44,922.51 | 112,000.00 | 40.11 % |
| 9062 25 Member Travel - Other | 896.95 | 5,500.00 | 16.31 % |
| 9063 25 Travel Staff | 878.77 | 5,500.00 | 15.98 % |
| 9064 25 Travel Conference | 1,764.29 | 15,000.00 | 11.76 % |
| Total 9060 25 Travel Allocation | 48,462.52 | 138,000.00 | 35.12 % |
| 9070 25 Board Development | 3,452.37 | 6,000.00 | 57.54 % |
| Total 9000 2025 Administrative | 894,468.11 | 2,142,288.62 | 41.75 % |
| Ask My Accountant1 | 5,780.84 | | |
| Total Expenses | \$2,229,325.46 | \$5,099,191.00 | 43.72 % |
| NET OPERATING INCOME | \$879,735.84 | \$ -5,099,191.00 | -17.25 % |
| NET INCOME | \$879,735.84 | \$ -5,099,191.00 | -17.25 % |

Florida Developmental Disabilities Council, Inc.
Profit and Loss by Class
October 2024 - March 2025

| | 2023 | 2024 | 2025 | TOTAL |
|--|----------------------|------------------------|---------------------|------------------------|
| Income | | | | |
| 4100 Grant - ADD | | | | 0.00 |
| 4102 Grant - NACDD - Bridging the Gap | | | 10,000.00 | 10,000.00 |
| Total 4100 Grant - ADD | \$ 0.00 | \$ 0.00 | \$ 10,000.00 | \$ 10,000.00 |
| 4101 Grant ADD | 518,493.41 | 2,580,567.89 | | 3,099,061.30 |
| Total Income | \$ 518,493.41 | \$ 2,580,567.89 | \$ 10,000.00 | \$ 3,109,061.30 |
| Gross Profit | \$ 518,493.41 | \$ 2,580,567.89 | \$ 10,000.00 | \$ 3,109,061.30 |
| Expenses | | | | |
| 9001 Computer Expenses | | 6,400.00 | 36,137.93 | 42,537.93 |
| 9002 Dues | | 169.00 | 384.60 | 553.60 |
| 9003 Education/Training | | | 2,450.00 | 2,450.00 |
| 9004 Insurance - General | | | 11,532.00 | 11,532.00 |
| 9008 Professional Fees | | | | |
| 9008.1 Legal Fees | | 6,014.65 | 5,910.75 | 11,925.40 |
| 9008.2 HR Consultant | | 5,059.98 | 12,500.00 | 17,559.98 |
| 9008.3 Consultant | | 38,296.24 | 99,657.81 | 137,954.05 |
| 9008.4 Accounting | | | 34,201.00 | 34,201.00 |
| 9005 Office Supplies & Expenses | | 898.69 | 3,881.97 | 4,780.66 |
| 9201 Bank Charges | | 246.21 | 708.51 | 954.72 |
| 9010 Employee Morale | | 93.92 | 1,154.86 | 1,248.78 |
| 9600 Payroll | | | | |
| 9600.1 Wages | | | 487,357.45 | 487,357.45 |
| 9600.2 Payroll Taxes | | | 37,425.61 | 37,425.61 |
| 9600.3 AFLAC | | | 4,533.48 | 4,533.48 |
| 9600.4 Dental Insurance | | | 539.79 | 539.79 |
| 9600.5 Health Insurance | | | 12,429.58 | 12,429.58 |
| 9600.6 Retirement | | 1,639.98 | 19,954.40 | 21,594.38 |
| 9600.7 STD, LTD and Life | | | 1,957.73 | 1,957.73 |
| 9009 Postage | | 260.73 | 598.91 | 859.64 |
| 9020 Rent | | | | |
| 9020.1 Building Rent | | 7,196.81 | 49,118.72 | 56,315.53 |
| 9020.2 Equipment Rental | | | 2,988.43 | 2,988.43 |
| 9023 Telephone | 284.64 | 285.76 | 2,820.07 | 3,390.47 |
| Travel Allocation | | | | 0.00 |
| 9061 Council Meeting/Other - Members & Staff | | 33,767.49 | 44,922.51 | 78,690.00 |
| 9062 Member Travel - Other | | 1,705.94 | 896.95 | 2,602.89 |
| 9063 Travel Staff | | 19.14 | 878.77 | 897.91 |
| 9064 Travel Conference | | | 1,555.39 | 1,555.39 |
| 9070 25 Board Development | | | 3,452.37 | 3,452.37 |

| | | | | | | | | |
|--|-----------|-------------------|-----------|---------------------|------------|---------------------|-----------|---------------------|
| Total 9000 Administrative Expenses | \$ | 284.64 | \$ | 102,054.54 | \$ | 879,949.59 | \$ | 982,288.77 |
| 6000 Program Expense | | | | | | | | |
| 6010 Access to Services | | | | 123,649.74 | | | | 123,649.74 |
| 6010.1 ASK Steering Committee & Research | | | | | | 49,280.98 | | 49,280.98 |
| 6010.2 ASK Personas & Journey Mapping Expert Contact Dev | | | | 141,151.40 | | | | 141,151.40 |
| Total 6010 Access to Services | \$ | 0.00 | \$ | 264,801.14 | \$ | 49,280.98 | \$ | 314,082.12 |
| 6020 Home & Comm Based Del System | | 71,347.39 | | 122,077.45 | | | | 193,424.84 |
| 6020.1 Best Practices in Case Management | | | | | | 164,344.00 | | 164,344.00 |
| 6020.2 Dual Diag Targeted Disparity | | | | | | 24,098.83 | | 24,098.83 |
| 6020.3 First Responder Training | | | | 35,641.70 | | 15,015.38 | | 50,657.08 |
| 6020.4 Behavioral Therapist Shortage | | | | 36,670.74 | | | | 36,670.74 |
| Total 6020 Home & Comm Based Del System | \$ | 71,347.39 | \$ | 194,389.89 | \$ | 203,458.21 | \$ | 469,195.49 |
| 6030 Aging Caregivers TF | | | | | | | | |
| 6030.1 Aging Caregivers Roadmap Initiative | | | | 33,656.67 | | 15,112.50 | | 48,769.17 |
| 6030.2 Researching Aging Caregiving Families | | | | | | 40,114.22 | | 40,114.22 |
| Total 6030 Aging Caregivers TF | \$ | 0.00 | \$ | 33,656.67 | \$ | 55,226.72 | \$ | 88,883.39 |
| 6040 Self Advocacy Leadership | | | | 42,901.44 | | | | 42,901.44 |
| 6040.1 Partners In Policymaking Coordinator | | | | | | 32,500.00 | | 32,500.00 |
| 6040.2 SAL TF Travel/Supports | | | | 663.64 | | 105,878.36 | | 106,542.00 |
| 6040.3 Florida SAND | | | | | | 62,159.44 | | 62,159.44 |
| 6040.4 Partners In Policy Curriculum Strand Travel | | | | | | 47,536.00 | | 47,536.00 |
| Total 6040 Self Advocacy Leadership | \$ | 0.00 | \$ | 43,565.08 | \$ | 248,073.80 | \$ | 291,638.88 |
| 6060 Advocacy & Communications | | | | | | | | |
| 6060.1 Communications | | | | 7,630.74 | | 40,921.16 | | 48,551.90 |
| 6060.2 State Plan Goal Related (Easy Read, Sp Trans) | | 7,500.00 | | | | 4,177.09 | | 11,677.09 |
| 6060.3 Public Policy / Legislative Education | | | | | | 16,993.46 | | 16,993.46 |
| Total 6060 Advocacy & Communications | \$ | 7,500.00 | \$ | 7,630.74 | \$ | 62,091.71 | \$ | 77,222.45 |
| Total 6000 Program Expense | \$ | 78,847.39 | \$ | 544,043.52 | \$ | 618,131.42 | \$ | 1,241,022.33 |
| Ask My Accountant1 | | | | 1,955.72 | | 4,058.64 | | 6,014.36 |
| Total Expenses | \$ | 79,132.03 | \$ | 648,053.78 | \$ | 1,502,139.65 | \$ | 2,229,325.46 |
| Net Operating Income | \$ | 439,361.38 | \$ | 1,932,514.11 | -\$ | 1,492,139.65 | \$ | 879,735.84 |
| Net Income | \$ | 439,361.38 | \$ | 1,932,514.11 | -\$ | 1,492,139.65 | \$ | 879,735.84 |

Wednesday, Apr 23, 2025 11:57:11 AM GMT-7 - Cash Basis



Funding & Budget Policy

FUNDING:

The Developmental Disabilities Grant Award to Florida is used to carry out the Council's responsibilities as stipulated in the Developmental Disabilities Assistance and Bill of Rights Act. The grant award is issued annually based on a formula from the federal government. Although availability and distribution of the award is mandated annually to each state from the federal government at the beginning of the federal fiscal year (October), availability of funds is at the discretion of the activities of Congress in any given year. The federal funding allocation requirement is no more than 30% of the award is applied to administration, and 70% for state plan to programmatic purposes. Hence, it is the responsibility of the Finance Committee and Council to monitor both funding and spending to ensure cash flow, solvency, federal obligation and spending requirements are met ~~quarterly and annually~~ on a regular basis.

FUNDING ALLOCATION:

The Council's operating budget is allocated into three main categories ~~internal process~~ for budgeting the annual award dollars ~~is~~ as follows: a) administration, b) programmatic state plan activities, and c) program reserve. The All 3 budget budget to actual amounts ~~are~~ reviewed monthly by the Executive Director, Chief of Operations and Finance (COF) and outsourced accounting firm designated as Chief Financial Officer (CFO), quarterly by the Finance Committee quarterly, and reported to the full Council tri-annually.

Administration:

These are non-state plan activities that include administrative overhead, Council development, evaluation/oversite and any other costs not associated with state plan activities. Of the total yearly federal award to Florida, federal guidelines allow utilization of up to 30% for administration. ~~The administration budget to actual is reviewed monthly with the Executive Director, quarterly with the Treasurer, and reported tri-annually to the Finance Committee and full Council. The Finance Committee reviews the annual budget presented on a quarterly basis to ensure that the costs are in alignment with the federal administrative and programmatic requirements and financials are reconciled. In addition, the Finance Committee will review on an annual basis the necessary match requirements to secure the federal award.~~



State Plan Activities:

Much of the annual federal award to the Council is allotted toward the 5-year state plan. The State Plan Committee reviews the projects procured to implement state plan programmatic activities on a quarterly basis to ensure that they are in alignment with the State Plan Work Plan as approved by the federal funding source.~~oversees the state plan budget, activities, and funding amounts. The state plan budget to actual is reviewed monthly with the Executive Director, quarterly with the Treasurer, and reported tri-annually to the State Plan Committee and full Council.~~

The Chairs of the Finance Committee and State Plan Committee will convene annually with the Executive Director and COF CFO to develop final recommendations for full Council adoption at the last Council meeting prior to the end of the fiscal year. Should federal funding levels change the Executive Director and COF will inform the Treasurer who will convene a special finance committee meeting as needed.

Program Reserve:

The Chief of Operations and Finance with approval of the Executive Director and external CFO shall draw down dollars in advance up to a minimum of one quarter's funding per federal regulation CFR 200 to sustain cash flow as needed. The advance funding shall be used for administration, contractual obligations and programmatic expenses. Council allocates 1.5% of its yearly federal award to the programmatic reserve will advance a minimum of one quarter's funding to sustain cash flow as needed. The advance funding shall be used for administration, contractual obligations, and programmatic purposes. In addition, ~~to the annual allotment of these funds,~~ the ~~programmatic~~ reserve also includes unutilized funds from contracts, line items, and administration as well as grant award surpluses with an offset for reductions. These funds may be used to a) address an emergency or emerging need of individuals with intellectual and developmental disabilities (I/DD) and/or their community, b) address an emergency or emerging issue that will severely impact the community of individuals with I/DD that is not specified in the state plan, c) address an emerging need of an initiative currently being implemented or in the proposal process, or d) provide additional funding to state plan initiatives or administrative activities. The surplus funds are anticipated on an annual basis and must be expended prior the end of the federal award period of performance. Justification and approval are required for use of these funds.



The amount of the requested expenditure and justification for the expenditure must be presented to the Executive Director for approval. The amount requested cannot exceed the micro-purchase amount noted in FDDC's procurement policy. Upon receipt of the justification the Executive Director will obtain written agreement from either the Treasurer or the Council Chair and provide final approval.

FUNDING COMMITMENT:

~~The State Plan Committee will approve a multi-year state plan programmatic budget at the commencement of the Council's approval of the five-year state plan. The State Plan Committee will review the budget tri-annually and make any recommendations for modifications to the budget on an annual basis.~~

~~The Finance Committee will approve a multi-year administration budget to coincide with the five-year state plan. The Finance Committee will review the budget/expenses tri-annually and make any recommendations for modifications to the budget on an annual basis.~~

~~The Executive Committee and Finance Committee will meet annually to review any modifications to the multi-year budget and approve any changes to the full Council budget.~~

~~The Council budget will be reviewed and approved jointly by the Finance Committee and the Executive Committee at the last Council meeting prior to the end of the fiscal year.~~

The Council obligates and spends grant award dollars within a two-year timeframe. Council funds are considered committed with the approval of the full Council budget. This allows staff to proceed with the procurement of funds for the identified Council initiatives.

Council funds are considered obligated when the committed funds have been expended or are in a contract.

The ~~State Plan~~Finance Committee will monitor the obligation of funds approved by the Council for State Plan Activities and administration. The Chair of the State Plan Committee shall advise the Executive Director and Treasurer if state plan projects exceed the approved annual budgetary amount.

~~The Finance Committee will monitor the obligations of funds approved by the Council for Administration~~



BUDGET SURPLUS OR DEFICIT:

FDDC's grant award is issued annually based on a formula from the federal government. Consequently, the amount of FDDC's award will vary from year to year which may result in a budget surplus or reduction as each year's budget is based on the prior year's funding amount. If a budget surplus occurs, the surplus funds will be transferred to ~~Program~~ Reserve. Budget reductions will be offset against the ~~Program~~ Reserve funds. Contingency funding recommendations may be developed in the event additional funding becomes available.

~~The Council obligates and spends grant award dollars within a two year timeframe.~~

Original Date: 9/9/11

Revisions:

9/14/12

1/29/15

9/23/16

11/15/16

9/21/18

11/15/22

**EXECUTIVE COMMITTEE MEETING
AGENDA**

Thursday May 1, 2025

6:00 p.m.-7:00 p.m.

Via Zoom

<https://fddc.zoom.us/j/84209206709>

Meeting ID: 842 0920 6709

Passcode: 653012

OUR MISSION

“To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities”.

| | | |
|------------------|---|--|
| 6:00 p.m. | Welcome & Introductions | <i>Eddie Hall, Chair</i> |
| | Approval of Agenda** | <i>Eddie Hall, Chair</i> |
| 6:10 p.m. | Approval of Minutes** <i>(A) 01/21/2025</i> | <i>Eddie Hall, Chair</i> |
| 6:15 p.m. | Personnel Updates | <i>Danielle Towery, HR Solutions</i> |
| | Employee Handbook Revisions ** <i>(B) Employee Handbook Revisions</i> | <i>Danielle Towery, HR Solutions</i> |
| | Salary/Compensation Report <i>(C) Salary/Benefits Study</i> | <i>Danielle Towery, HR Solutions</i> <i>Ryan Funsch, Compensation Resources, Inc.</i> |
| 6:50 p.m. | Bylaws Revisions <i>(D) Task Force Recommendations</i> | <i>Eddie Hall, Chair</i> <i>Enrique Escallon, Vice Chair</i> |
| 7:00 p.m. | Public Comment | <i>Eddie Hall, Chair</i> |
| 7:00 p.m. | Meeting adjourned | <i>Eddie Hall, Chair</i> |

*** Items that require vote**

Florida Developmental Disabilities Council, Inc.

Executive Committee Meeting Minutes

Tuesday January 21, 2025

Via Zoom

Executive Committee Members Present: Enrique Escallon; Dr. Dennis Hart; Elly Hagen; Sarah Goldman; Yolanda Herrera.

Executive Committee Members Absent: Eddie Hall; Arizona Jenkins.

Other Council Members and Guests Present: Carla Mercer; Danielle Towery, HR Solutions.

Staff Present: Valerie Breen, Executive Director; Monca Moye; Sue Kabot; Sarah Macaluso.

Breen conducted roll call and quorum was established. Hall called the meeting to order at 4:25 p.m.

I. Adoption of the Agenda

Action Taken: Goldman made a motion to adopt the agenda. Hart seconded. Discussion was offered; none occurred. Motion passed unanimously.

II. Approval of the Minutes for 09/19/2024

Action Taken: Goldman made a motion to adopt the minutes. Hart seconded. Escallon called for discussion. He asked Breen to report on a memo sent to the Executive Committee via e-mail on 1/20/2025 for their review and discussion regarding a process for transparency for the Executive Committee surrounding employee complaints. After some discussion the committee agreed that they wanted the full Council to be aware that they have taken the full Council's concerns seriously. The committee agreed that a process for handling employee complaints to the board will be turned over to the ethics attorney the Council is hiring through GrayRobinson for consideration along with other processes needed in the development of the new bylaws and policies for the Council. Motion passed unanimously.

III. Personnel Updates

Towery reported to the committee that the summary judgement for the Vanda Jenkins lawsuit is scheduled for February 4, 2025.

Towery provided an update on coaching and salary and benefits study that was addressed in the September 2024 meeting. She stated even though coaching for staff could be a valuable service for the Council to consider in the future, she noted that with the current improvement in staff morale, she recommended a staff recognition program as a more cost-effective measure at this time. The committee members agreed that the recognition program was good for the organization and recommended that the employee receive the full net amount of the award.

Towery reported that two staff will be recognized for 20205 and the costs are in the 2025 budget recommended by the Finance Committee for 2025.

Towery discussed with the committee members her recommendations provided at the September Council meeting to include a benefits study along with a salary study. Towery reported that there were two companies of the 3 she had recommended in September 2024, that could do the combined salary and benefits study. She recommended Compensation Resources to the committee since the other resource was significantly higher in costs. The amount was included in the 2025 budget recommended by the Finance Committee in the amount of \$10,400. Towery indicated that she would plan to initiate the study in February 2025.

Towery reported that the FDDC Employee Handbook shared with the full Council in September 2024 will be updated with a target fate for adoption at the May 2025 Council meeting. She reported that she would have a draft to the Executive Committee by March 1, 2025, and asked if committee members would review the content of the current handbook and send her any questions by Friday February 21, 2025. Towery reported that the final draft will be shared with the full Council [prior to the May 2025 Council meeting.

IV. 2025 Council/Executive Director Priorities

Breen presented a chart of priorities for the committee to prioritize for 2025. The committee agreed that the top priority was to begin review of the Council structure and bylaws through the ethics attorney hired by the Council and the Council Review Bylaws Task Force. This would begin in February with a target end date for a draft by May 2025. The salary benefits study will be led by Tower beginning in February 2025 with the final recommendations to be made at the May 2025 Council meeting. Towery will begin the FDDC Employee Handbook revisions in February with a draft for review in March 2025. The Applications Task Force reviews will begin in April with recommendations to the Governor by August 2025.

V. Recommendations to the Full Council

1. Hire Tallahassee based law firm, GrayRobinson ethics attorney to review FDDC's structure and current requirements as a non-profit, in Florida statue, under federal law and develop bylaws that contain processes for the Council moving forward. Engage the firm in early February to begin the process. The Finance Committee included a budget for attorney fees in the 2025 budget.
2. Adopt the Employee Recognition Program as presented with clarification in the final policy that the employee will receive the net amount of the full award.
3. Hire Compensation Resources to conduct both the salary compensation and benefits study.
4. Establish a Bylaws Review Task Force comprised of Council members to review the current bylaws.
5. Establish an Applicant Review Task Force comprised of Council members to review the current applications through the Council's website for Council member seats.

VI. Public Input

Escallon asked if there was any public comment. There was none.

Escallon adjourned the meeting at 5:43 p.m.

DRAFT

EMPLOYEE HANDBOOK



Adopted 5/15/2020
Revised 10/23/2023
[Revised 04/01/2025](#)

FDDC EMPLOYEE HANDBOOK

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Adopted 5/15/2020
Revised 10/23/2023
Revised 04/01/2025

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EMPLOYEE WELCOME MESSAGE

Welcome to the Florida Developmental Disabilities Council, Inc. (FDDC). We are very pleased to have you as a member of this outstanding team of dedicated professionals!

The FDDC values the many talents and abilities of its employees and seeks to foster an open, cooperative, and dynamic environment where employees and the Organization alike can thrive. All our employees are necessary contributors when it comes to providing the highest quality services and creating a strong professional image to everyone who interfaces with the Organization.

We believe you will enjoy your work while you are here. We also believe you will find the FDDC to be a place where you can experience growth and be recognized for your achievements and your contributions to the team effort.

If you are an employee who has been on board a while, we hope to continue our good working relationship. If you are a new employee, we want to state how extremely pleased we are to have you join us in our worthwhile endeavors; and we look forward to a mutually beneficial relationship with you.

If any employee has any questions or concerns regarding their work, these should be addressed to their manager or to either the [Manager of Human Resources](#) [Director, Contracts & Operations](#), or the Executive Director. Regardless of employment status, full-time, part-time, or temporary/contractor, all workers are important to the FDDC. Exemplary professional conduct and use of talents and skills in a committed fashion on the part of new and existing employees will contribute to our ongoing success for the long term.

INTRODUCTION

The purpose of this Handbook is to clearly communicate relevant information to the employees of the Florida Developmental Disabilities Council, Inc. and provide a general overview of Organization practices and procedures. It is intended to be a helpful tool in the orientation of new employees as well as a useful resource for all current employees. All employees are expected to read, understand, and comply with all provisions of this Handbook.

If anyone has a question of whether a subject applies to them, they should speak with their manager or the [Manager of Human Resources](#) [Director, Contracts & Operations](#).

FDDC EMPLOYEE HANDBOOK: DISCLAIMER

This Handbook is provided for general informational purposes only. Nothing in this Handbook constitutes an implied or expressed contract, guarantee or assurance of employment or any right to employment, or any right to an employment-related benefit or process/procedure. The FDDC reserves the right to change, modify, eliminate or deviate from any policy or procedure in this handbook at any time and to hire, transfer promote, discipline, terminate and otherwise manage its employees as it deems appropriate. When/if questions arise as to any provision or portion of this Handbook, the Organization Policy covering that issue should be consulted and/or the employee's manager or the [Manager of Human Resources](#) [Director, Contracts & Operations](#).

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CODE OF ETHICS

Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The following Code of Ethics offers a set of values, principles, and standards to guide employees.

- 1) Employees shall respect the unique needs, values and choices of persons with disabilities and their families.
- 2) Employees have a public duty to carry out the charge of the Developmental Disabilities Assistance and Bill of Rights Act, the Council's five-year State Plan., and all federal and state requirements as outlined by our federal funding source and the State of Florida. As such, staff shall take this responsibility seriously, communicating fully and honestly in the performance of all their duties enabling the Council to make fully informed, prepared and thoughtful decisions.
- 3) Employees shall provide sufficient information to enable informed decision making by the Council.
- 4) Employees shall be alert to and fully disclose situations that may cause a conflicting interest or have the appearance of a conflict. When a conflict of interest arises, the employee shall act in accordance with the Conflicts of Interest Policy.
- 5) Employees shall abstain from disruptive, disrespectful, and abusive behavior towards others and will always act with courtesy, dignity, and decorum.
- 6) Employees shall fulfill their duties in a manner that is sensitive to cultural differences and shall not discriminate against individuals based on age, disability, race, ethnicity, creed, religion, color, national origin, sex, gender identification, or sexual orientation.
- 7) Employees shall, in all circumstances when representing the Council, conduct themselves in a manner that preserves the credibility and reputation of the Council.
- 8) Employees shall not speak for the full Council or act for the Council unless specifically authorized to do so by the Executive Director.
- 9) Employees shall respect the differing opinions of Council members when representing the Council and shall respect and support the decisions of the Council as a whole.
- 10) Employees will refrain from any illegal conduct.
- 11) Employees will refrain from any dishonest or unethical conduct that could adversely impact the Council or the image or reputation of the Council.

If a situation arises where it is difficult to determine the proper course of action, the matter should be discussed openly with the employee's immediate manager. If necessary, it can be further discussed with the Executive Director.

Compliance with this Code of Ethics policy is the responsibility of every FDDC employee. Disregarding or failing to comply with this Code may lead to disciplinary action, up to and including termination of employment.

CONSEQUENCES

Failure to make required disclosures or resolve conflicts of interest satisfactorily can result in discipline, up to and including, termination of employment.

GIFTS

Employees are discouraged from taking gifts from vendors or others doing business or wishing to do business with the FDDC.

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EEO/ANTI-HARASSMENT POLICY

The FDDC is committed to a work environment in which all individuals are treated with respect and dignity. Everyone has the right to work in a professional atmosphere that promotes equal employment opportunities and prohibits discriminatory practices, including harassment. Therefore, the FDDC expects that all relationships among persons in the office will be business-like and free of bias, prejudice, and harassment. **Please see the complete EEO/Anti-Harassment Policy in the Appendix of this Handbook.**

AMERICANS WITH DISABILITIES ACT AND AMENDMENT ACT

The FDDC complies with all requirements of the ADA and ADAAA by providing reasonable accommodation for the known physical or mental limitations of qualified employment applicants or employees with disabilities unless the accommodation would impose an undue hardship on the operation of the Organization.

The need for reasonable accommodation and undue hardship will be determined on a case-by-case basis, according to the abilities of the employee.

Job descriptions are developed with the needs of persons with disabilities in mind. Job functions and qualifications are set at the minimal levels necessary to adequately perform each job.

PREGNANT WORKERS FAIRNESS ACT

The federal Pregnant Workers Fairness Act (PWFA) requires employers to provide “reasonable accommodations” to a worker’s **known limitation** related to pregnancy, childbirth, or related medical conditions, unless the accommodation will cause the employer an “undue hardship.”

The term “known limitation” means physical or mental condition related to, affected by, or arising out of pregnancy, childbirth, or related medical conditions that the employee has communicated to the employer.

Pregnant employees will be qualified for “reasonable accommodations if any inability to perform essential functions is for a temporary period; the essential function could be performed in the near future; and the inability to perform the essential function can be reasonably accommodated. Examples of reasonable accommodations under the PWFA include exemption from strenuous activities and/or activities that involve exposure to compounds not safe for pregnancy. **Please see the Pregnancy Fairness Act in the Appendix of this Handbook.**

[Lactation Accommodation \(PUMP Act Compliance\)](#)

[In compliance with the PUMP Act, lactating employees will be provided a private, non-bathroom space for expressing breast milk. Breaks for this purpose will be paid where required by law.](#)

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EMPLOYMENT POLICIES

EMPLOYMENT-AT-WILL

No policy or provision in this Handbook is intended to create a contract binding the employee or employer to any agreement of employment for a specific period. A worker's employment can be terminated by either the employee or the Organization at any time, for any reason, with or without notice. No representative or agent of the employer, other than the Executive Director can authorize or sign an employment agreement contrary to these terms or otherwise make any binding offer of employment for a specific term.

CONFLICTS OF INTEREST

All employees must avoid activities or relationships that conflict with the interests of the FDDC, or which might adversely affect the reputation of the FDDC. The types of activities and relationships employees must avoid include, but are not limited to:

- Accepting or soliciting a favor or service that is intended to, or might appear to, influence the employee's decision-making or professional conduct.
- Accepting, agreeing to accept, or soliciting money or other tangible or intangible benefit in exchange for the employee's favorable decisions or actions in the performance of their job.
- Accepting employment or compensation or engaging in any business or professional activity that might require disclosure of confidential information regarding the FDDC.
- Accepting employment or compensation that could reasonably be expected to impair the individual's independent judgment in the performance of their duties for the FDDC; and
- Making personal investments that are contrary to the interests of the FDDC and/or not reporting to the FDDC ownership (partial or otherwise) of a vendor doing business with the FDDC.

Employees have an obligation to conduct business within guidelines that prohibit actual or potential conflicts of interest. This policy establishes minimum requirements to prevent conflicts of interests. It also provides a framework for assessing if a conflict-of-interest potentially exists, for which actions are needed to avoid an actual conflict of interest or appearance of conflict of interest from occurring.

- 1) Employees are not permitted to receive a direct financial benefit from their employment with the Council outside the Council's employment compensation.
- 2) Employees are not permitted to receive financial compensation from Council funds through contractors/grantees, sub-contractors/sub-grantees, or other avenues, other than their Council employment compensation.
- 3) Employees are to avoid conflicts of interest, potential conflicts of interest, or actions that would lead to the appearance of a conflict of interest regarding Council activities. A conflict of interest exists when an employee has a personal interest that impairs the independence of their judgment to the point that it tends to lead to the disregard of their public duty or interest.
- 4) Employees and their relatives are not permitted to directly or indirectly solicit or accept from contractors/grantees, sub-contractors/sub-grantees, consultants, or individuals or organizations with which the Council has a financial arrangement any gift, loan, reward, promise of future employment, favor, service or anything that would improperly influence their decisions or actions. Employees and their relatives are not permitted to directly or indirectly solicit or accept from individuals or organizations not currently in a financial arrangement with the Council any gift.
- 5) Employees are not permitted to use or attempt to use their Council positions, or any property or resource which may be within their trust, to secure special privilege, special benefit or exemption for themselves or others.

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- 6) Employees are not permitted to disclose or use information not available to the general public and gained by reason of their Council activities for personal gain or benefit or for the personal gain or benefit of any other person or business entity.
- 7) Employees are not permitted to use any personal funds as match for a Council grant or contract.
- 8) Employees are to immediately disclose in writing conversations or opportunities for employment with an awardee/grantee/contractor.
- 9) Employees are not permitted to manage a contract where the independence and accountability of the management of the contract cannot be ensured.

Should a conflict of interest or potential conflict of interest arise, the matter should immediately be brought to the attention of the immediate manager and Executive Director. Disregarding or failing to comply with this conflict-of-interest policy could lead to disciplinary action, up to and including termination of employment.

CONFIDENTIALITY/NON-DISCLOSURE/NON-SOLICITATION/IP AGREEMENT

The FDDC has established a *Non-Disclosure Agreement*, execution of which is a condition of employment with the Organization.

In the course of employment with the Organization, employees may have access to confidential information regarding the Organization, which may include its strategies, future plans, financial information, contracts, suppliers, services recipients, personnel information or other information that the Organization considers proprietary and confidential. Maintaining the confidentiality of this information is vital to the Organization's reputation and, ultimately, to its ability to sustain success and stability. Employees must protect this information by safeguarding it when in use, using it only for the business of the Organization and disclosing it only when authorized to do so and to those who have a legitimate business need to know about it. This duty of confidentiality applies whether the employee is on or off the Organization's premises, and during and even after the end of the employee's employment with the Organization. This duty of confidentiality also applies to communications transmitted by the Organization's electronic communications. See also Internet, Email and Computer Use policy, herein.

OPEN DOOR POLICY

FDDC believes that employees are valued assets and open communication within an atmosphere of mutual trust is of prime importance to its employees. Realizing that effective communication is always a two-way street, FDDC values employees' constructive opinions, suggestions and feedback so that issues of concern can be constructively resolved in the workplace.

This policy is intended to establish an informal problem resolution process. This open door policy is not a substitute for FDDC's policies on harassment, equal employment opportunity, or employee grievance.

If the employee complaint is regarding illegal harassment, discrimination or retaliation, the employee should follow the reporting procedure outlined in the EEO/Anti-Harassment Policy in the Employee Handbook.

An Open Door Policy means that the door to the supervisor's office is always open and employees should feel comfortable speaking with their supervisors about any questions/concerns they have. In most cases, talking with the supervisor is the most effective and efficient way to resolve issues. The supervisor is typically the most direct source of information regarding an employee's job and departmental policies and procedures. If the supervisor is unable to provide assistance, then the

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employee may discuss problems or suggestions with a higher level manager instead of, or in addition to, their supervisor. Issues are usually resolved through this informal communication. If a satisfactory resolution is not reached at this level, then complaints may be brought forward through FDDC's Grievance Policy.

Supervisors are expected to have an open door policy that is designed to encourage employees to bring forward any concerns or questions to them so that issues can be resolved constructively together. It is a violation of FDDC policy to retaliate against anyone who brings a good-faith concern to their supervisor's attention.

Employees should remember that not every problem can be resolved to everyone's total satisfaction, but only through understanding and discussion of mutual problems can employees and management develop confidence in each other. This confidence is important to the operation of an efficient, harmonious, organization.

GRIEVANCE POLICY

FDDC recognizes that there are times when the need arises for employees to express concerns or complaints in a formal manner. The following procedures will ensure that employees receive a fair and unbiased review of workplace concerns.

STEP 1: Informal Discussion with Supervisor – Employee concerns should first be discussed with the employee's immediate supervisor. Many concerns can be resolved informally when an employee and supervisor take time to review the concern and discuss options to address the issue. If the employee is not satisfied with the results of the informal discussion, or if the problem involves that manager, the employee should go to Step 2. **If the employee complaint is regarding illegal harassment, discrimination or retaliation, the employee should follow the reporting procedure outlined in the EEO/Anti-Harassment Policy in the Employee Handbook.**

STEP 2: Written Complaint to Supervisor – This complaint should be filed with the immediate manager within five days and a copy to the Human Resources representative. The Written Complaint shall be submitted in writing and may be submitted via email. The subject line of the Written Complaint shall read: "*Written Complaint*." The Written Complaint shall designate: (1) the nature of the grievance, (2) detailed information including evidence of the issue, witnesses, related policies, etc., and (3) the desired remedy or outcome. The manager will review the Written Complaint and submit their written response to the employee within a reasonable time period, with a goal of doing so within five (5) working days of the employee's filing of the Written Complaint. If the employee is not satisfied with the response from the immediate manager, the employee should go to Step 3. **If the employee complaint is regarding illegal harassment, discrimination or retaliation, the employee should follow the reporting procedure outlined in the EEO/Anti-Harassment Policy in the Employee Handbook.**

If the employee's immediate manager is the subject of the Formal Complaint, the Written Complaint will be filed with the Executive Director with a copy to the HR representative. The Executive Director will review the Written Complaint and submit their written determination to the employee within a reasonable time period, with a

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goal of doing so within ten (10) working days of the employee's filing of the Written Complaint. The findings of the Executive Director shall constitute the final determination as to the Formal Complaint.

STEP 3: Written Complaint to Executive Director: The employee may request a review of the Complaint by the Executive Director within three (3) working days of receiving the manager's written determination, with a copy of the request to the Human Resources representative. The request for review should include: (1) an explanation of the grievance and details of all previous efforts to resolve the issues, (2) a copy of the written complaint submitted to the immediate supervisor, (3) a copy of the immediate supervisor's written response to the employee's complaint, and (4) detailed information regarding the employee's dissatisfaction with the immediate supervisor's response. The Executive Director shall review the Written Complaint, consult with the employee's immediate supervisor, the Human Resources representative, and other relevant parties, and issue a final, written determination. The findings of the Executive Director shall constitute the final determination as to the Written Complaint.

If the complaint involves the Executive Director, the employee may proceed to Step 4:

STEP 4: If the complaint involves the Executive Director, the Written Complaint shall be filed with the Chair of the Council with a copy to the HR representative. The Written Complaint shall include: (1) the nature of the grievance, (2) detailed information including evidence of the issue, witnesses, related policies, etc., and (3) the desired remedy or outcome. The Council Chair will review the Written Complaint and submit their written determination to the employee within a reasonable time period, with a goal of doing so within ten (10) working days of the employee's filing of the Written Complaint. The findings of the Council Chair shall constitute the final determination as to the Written Complaint.

If the employee complaint is regarding illegal harassment, discrimination or retaliation, the employee should follow the reporting procedure outlined in the EEO/Anti-Harassment Policy in the Employee Handbook.

WHISTLEBLOWER POLICY

The Florida Development Disabilities Council (FDDC) requires members to observe high standards of business ethics in the conduct of their duties and responsibilities. Employees and representatives of the FDDC must practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws and regulations.

It is the responsibility of all members and employees to report suspected violations of such business ethical standards of conduct in accordance with this Whistleblower Policy.

A whistleblower as defined by this policy is an employee of FDDC who, in good faith, reports a violation of business ethical standards of conduct or activity that the employee considers to be illegal or dishonest. The whistleblower is not responsible for investigating the activity or for determining fault or corrective measures; appropriate management officials are charged with these responsibilities.

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Examples of illegal or dishonest activities are violations of federal, state, or local laws; billing for services not performed or for goods not delivered; and other fraudulent financial reporting.

Whistleblower protections are provided in two important areas:

Confidentiality – The confidentiality of the whistleblower will be maintained to the extent possible. However, identity may have to be disclosed to conduct a thorough investigation, comply with the law, and to provide accused individuals their legal rights of defense.

Retaliation - FDDC will not retaliate against a whistleblower. This includes, but is not limited to, protection from harassment and retaliation in the form of adverse employment action such as termination, compensation decreases, or poor work assignments, and threat of physical harm. Any whistleblower who believes they are being retaliated against must contact the Human Resources representative immediately. The right of a whistleblower for protection against retaliation does not include immunity for any personal wrongdoing that is alleged and investigated.

PROCEDURE:

1. Employees should first report such conduct or activity to their immediate supervisor. Supervisors and managers are required to report suspected violations to the Executive Director. If the conduct/activity involves the immediate supervisor, the employee should go to Step 2.

If the employee complaint is regarding illegal harassment, discrimination or retaliation, the employee should follow the reporting procedure outlined in the EEO/Anti-Harassment Policy in the Employee Handbook.

2. If the employee's immediate supervisor is the subject of the report, the conduct/activity should be reported directly to the Executive Director.

3. The Executive Director will promptly investigate all reported allegations concerning violations of business ethical standards. The Executive Director, at their discretion, may inform the Council Chair and together they will determine an appropriate course of action.

4. If the Executive Director is the subject of the report, the conduct/activity should be reported to the Associate Director and/or the HR representative, who will immediately provide the report to the Chair of the Council.

5. Anyone filing a complaint concerning a suspected violation of the ethical standard of conduct must be acting in good faith and on reasonable grounds for believing the information disclosed indicates a violation of such ethical standards. An employee who intentionally files a false report of wrongdoing will be subject to discipline up to and including termination of employment.

Employees with questions regarding this policy should contact the Human Resources representative.

SOLICITATION AND DISTRIBUTION

To avoid work disruptions and possible discord between employees, the Organization prohibits employees from soliciting other employees or distributing literature in connection with non-work-

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related causes, commercial pursuits, groups, or interests **without the express permission of the employee's manager or the [Director, Contracts & Operations](#).**~~Human Resources Manager.~~

Prohibited Solicitation: Solicitation includes, but is not limited to, asking employees for funds or contributions, offering goods for sale (whether for charitable or for commercial purposes), asking employees to sign a petition, requesting employees to join or become a member of a group, soliciting an employee's support for a political candidate, or otherwise requesting employees' support or commitment with respect to causes, groups, or interests.

DRESS AND PERSONAL APPEARANCE

Dress, grooming, and personal cleanliness standards contribute to the morale of all employees and affect the business image FDDC presents to the community.

During business hours or when representing FDDC, you are expected to present a clean, neat, and tasteful appearance. You should dress and groom yourself according to the requirements of your position and accepted social standards. Consult your manager if you have questions as to what constitutes appropriate appearance. When necessary, reasonable adjustments may be made to accommodate a person with a disability.

The following information is intended to serve as a guide to help define appropriate casual business wear for all employees:

Casual shirts: All shirts with collars, business casual crewneck or V-neck blouses, and golf and polo shirts. Examples of inappropriate shirts include T-shirts, shirts with inappropriate slogans or graphics, spaghetti-strap dresses or tops, halter tops, muscle shirts, camouflage, crop tops or shirts that expose undergarments.

Pants: Casual slacks and trousers and jeans without holes, frays, etc. Examples of inappropriate pants include shorts, short skirts, spandex or other form fitting pants, bib overalls, warm-up or jogging suits and pants, sweatpants, camouflage, or pants that expose undergarments.

Footwear: Casual slip-on or tie shoes, dress sandals, and clean athletic shoes. Examples of inappropriate footwear include flip-flops and slippers, construction and hunting boots.

If an employee reports to work dressed in appropriate clothing, they may be sent home to change. If/when this occurs, the time involved will be charged to the employee's PTO or be unpaid if the employee has no PTO accrued.

Please note that during any public meetings, or council sponsored events, jeans will not be permissible.

EMPLOYMENT OF RELATIVES

As a general practice, the FDDC discourages the employment of close relatives which are defined as spouse, mother, father, son, daughter, brother, sister, grandparent, or in-law. Employees who enter into a personal relationship will be treated as a "close relative" for management purposes. If a "close

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relative” situation is created, an accommodation acceptable to the Organization must be worked out. Termination is a last resort.

Relatives of current employees may not occupy a position that will be working directly for or supervising their relative. If a relative relationship or dating relationship is established after employment between employees who are in a reporting situation working directly for or supervising their relative, it is the responsibility and obligation of the manager involved in the relationship to disclose the existence of the relationship to management. The individuals concerned will be given the opportunity to decide who is to be transferred to another available position or resign if necessary. If that decision is not made within 30 calendar days, management will decide who is to be transferred or, if necessary, terminated from employment.

In other cases where a conflict or the potential for conflict arises because of the relationship between employees, even if there is no line of authority or direct reporting involved, the employees may be separated by reassignment. Termination of employment is the last resort.

EMPLOYMENT OF MINORS

The FDDC will fully comply with the Child Labor provisions of the Fair Labor Standards Act and applicable state statutes that govern the employment of minors.

For the purpose of insurance risk, it is the Organization's policy to discourage the employment of individuals younger than age 18 in any position with the Organization. In any case involving the hire of a person under the age of 18, a written release must be secured from the parents in advance of the person's start date. Should the Organization have any cause to question the individual applicant's age, the applicant may be required to furnish proof of birth.

OUTSIDE EMPLOYMENT

An employee may hold a job with another organization if he or she satisfactorily performs their job responsibilities with FDDC. All employees will be subject to FDDC's scheduling demands, regardless of any outside work requirements.

Any current FDDC employee seeking outside employment must disclose the place and hours of the second employment to their manager within 10 days of accepting the additional employment. Applicants for employment with FDDC who hold second jobs must disclose the place and hours of additional employment at the time they make an application for employment with FDDC.

If FDDC determines that an employee's outside work interferes with performance or the ability to meet the requirements of FDDC as they are modified from time to time, the employee may be asked to terminate the outside employment if they wish to remain with FDDC. Outside employment will present a conflict of interest if it has an adverse impact on FDDC.

EMPLOYMENT APPLICATIONS

FDDC relies upon the accuracy of information contained in the employment application, as well as the accuracy of all other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information may result in the exclusion of the individual from further consideration for employment, or if the person has been hired, termination of employment.

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JOB DESCRIPTIONS

The FDDC makes every effort to create and maintain accurate job descriptions for all positions within the organization. Each description includes the job title; a job summary section (giving a general overview of the job's purpose); duties and responsibilities; and job requirements (the knowledge, skills and abilities necessary to do the job ably).

Employees should remember that job descriptions do not necessarily cover every task or duty that might be assigned, and that additional responsibilities may be assigned, as necessary.

If anyone has a question about their job description, they should discuss it with their immediate manager or with the [Director, Contracts & Operations](#)~~Human Resources Manager~~ or the Executive Director.

WORKPLACE ETIQUETTE

The FDDC strives to maintain a positive work environment where employees treat each other with respect and courtesy. Sometimes issues arise when employees are unaware that their behavior in the workplace may be disruptive or annoying to others. Many of these day-to-day issues can be addressed by politely talking with a co-worker to bring the perceived problem to their attention. In most cases, common sense will dictate an appropriate resolution. The FDDC encourages all employees to keep an open mind and graciously accept constructive feedback or a request to change behavior that may be affecting another employee's ability to concentrate and be productive.

EMPLOYMENT STATUS AND RECORDS

DEFINITIONS OF EMPLOYMENT

Organization policies apply to all categories of workers; however, the following categories are defined for the purpose of compensation, benefits, and other management-related practices.

REGULAR FULL-TIME

Employees hired full-time ¹(32 or more hours a week) on a full work-week basis for a continuous and indefinite period are considered regular full-time employees for compensation and benefit purposes.

REGULAR PART-TIME

Employees whose work schedule is less than 32 hours per week but twenty-five (25) or more hours a week on a full work-week basis for a continuous and indefinite period are considered regular part-time employees for all compensation and benefit purposes. Regular part-time employees are eligible for some benefits by specific reference only (e.g., prorated PTO, prorated holidays, prorated bereavement)

TEMPORARY

Employees hired as temporary replacements for regular full-time or regular part-time employees for short periods of employment such as summer months, peak periods, for special projects and/or for

¹ Employees hired prior to the effective date of this Handbook who do not work 40 hours per week on a continuous basis but work more than 25 hours per week on a continuous basis and will be allowed to access the full-time regular employee welfare benefits programs (medical and other insurance programs, and 401(k)) but paid time off benefits will be prorated based on the usual/customary hours worked by such employee. For example, if s/he works 30 hours a week as a rule, s/he would accrue PTO at 75% of the rate for a full-time employee.

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vacation coverage are considered temporary employees. The rules of deportment contained in this Employee Handbook do apply to persons employed on a temporary basis.

CONTRACT WORKERS

Such individuals are not employees of the Organization; work intermittently and often remotely/virtually; may work for other entities; and often work on special projects. However, as with Temporary Employees, the rules of deportment contained in this Employee Handbook do apply to Contractors in most respects. For example, they are expected to act in a professional manner, provide accurate information on themselves to the Organization, report hours worked and achievements in an honest and straightforward fashion, and respect and respond promptly to requests made to them by FDDC management.

NOTE: Temporary employees and Contract Workers are not eligible for benefits regardless of the number of hours or weeks worked.

EMPLOYEE CLASSIFICATIONS

The federal Fair Labor Standards Act (FLSA) governs child labor, minimum wage, overtime pay, and--more recently--equal pay for men and women in the same type of jobs. The two employee classifications designated by the FLSA to which the FDDC adheres are **exempt** and **non-exempt**.

EXEMPT CLASSIFICATION

This status indicates that the employee is exempt from the FLSA regarding the requirement to receive compensation for time worked beyond forty (40) hours per week or additional time off for working in excess of that number of hours. In general, this classification is given to workers who can control their productivity and, therefore, the time devoted to completing their assignments. Some examples of types of exempt workers are executives, administrative employees who exercise independent judgment in carrying out their responsibilities, managers of two or more full-time employees, professionals and employees engaged in certain computer jobs or in outside sales.

NON-EXEMPT CLASSIFICATION

This status applies to employees who are covered by the minimum wage and overtime regulations of the FLSA and are paid for hours worked, including being paid one and one-half times their regular rate of pay for hours worked in excess of forty (40) hours per week.

In general, this classification is given to workers who must be at their jobs regardless of having more or less work to do—either to provide coverage or support on an as-needed basis. Examples of types of non-exempt workers are employees without managerial or similar responsibilities and administrative workers who are not normally involved with making substantial business decisions (affecting the operations of the Organization).

OVERTIME

Overtime work by non-exempt employees is an added expense of operations and, as such, must be approved in advance by the employee's manager. Examples of unauthorized overtime might be asking for approval after working past one's prescribed quitting time or making up time caused by tardiness without prior management approval.

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INTRODUCTORY PERIOD

The Introductory Period for new employees normally lasts up to ninety (90) days from date of hire. During this time, each new employee has their first opportunity to evaluate the Organization as an employer; and management has the first opportunity to evaluate the employee. The Introductory Period may be extended at management discretion due to absenteeism, performance issues, or other concerns that affect the assessment of the suitability of the employee for continued employment. Completion of the Introductory Period does not in any way alter the employment-at-will aspect of working for the FDDC.

During the Introductory Period, the employee accrues but is not eligible to use—be paid for—Paid Time Off (vacation or sick/personal).

HOURS OF WORK

The normal work schedule for all employees is 8 hours per day, 5 days per week. However, an employee may—with approval of their supervisor—work on a regular schedule, which is less or more than an 8-hour workday. Staffing needs and operational demands may necessitate variations in starting and ending times, as well as variations in the total hours that may be scheduled each day and week. The payroll week begins at 12:01 am Monday and ends 12:00 midnight Sunday.

MEAL PERIODS AND BREAKS

Florida state law does not require rest and meal breaks. Each workday, all regular full-time and introductory employee are provided with 2 rest periods of 15 minutes in length. Rest and meal periods for part-time employees will depend on hours worked. To the extent possible, rest periods will be provided in the middle of work periods. Since this time is counted and paid as time worked, employees must not be absent from their workstations beyond the allotted rest period time.

All regular full-time and introductory employees are provided with one meal period of 30 minutes or 60 minutes in length each workday. Supervisors will schedule meal periods to accommodate operating requirements. Employees will be relieved of all active responsibilities and restrictions during meal periods and will not be compensated for that time.

EMPLOYEE TIME RECORDS

Accurately recording time worked is the responsibility all employees. Federal and state laws require the FDDC to keep an accurate record of time worked to calculate employee pay and benefits. Time worked is all the time spent on the job performing assigned duties.

Employees should accurately record the time they begin and end their work. Overtime work must always be approved before it is performed.

Altering, falsifying, tampering with time records, or recording time on another employee's time record may result in disciplinary action, up to and including termination of employment.

It is the employees' responsibility to sign their time records to certify the accuracy of all time recorded. The manager will review and then sign the time record before submitting it for payroll processing.

PERSONNEL RECORDS

The Organization maintains a personnel file for each employee as required by law. Personnel files are the property of the Organization and may not be removed from the Organization's premises without

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written authorization. Because personnel files are confidential, access to the records is restricted. Generally, only those who have a legitimate reason to review information in an employee's file are allowed to do so. Disclosure of personnel information to outside sources will be limited. However, the Organization will cooperate with requests from authorized law enforcement or local, state, or federal agencies conducting official investigations and as otherwise legally required.

While separate files are maintained for specific types of information as mandated by law, employee personnel records will include the following:

- Employment application and resume
- Agreements such as Non-Disclosure/Confidentiality
- College Transcripts
- Job Descriptions
- Status changes (hiring, promotion, demotion, transfer, layoff, rates of pay and other forms of compensation)
- Education and training achievements
- Professional Licenses/Certifications
- Staff Handbook receipt
- Receipts for other employment policies as issued from time to time
- Letters of recognition and other commendations
- Performance evaluations
- Disciplinary notices or documents
- Test documents used by an employer to make an employment decision
- Driver license status
- Other relevant documents as determined by management

SEPARATE FILES

- Medical Records—including physical examinations, medical leaves, worker's compensation claims, and drug and alcohol testing.
- Equal Employment Opportunity Information—any source documents that identify an individual's race, sex, or gender identification plus any information on internal/external investigations relating to claims of unfair treatment related to protected status.
- Immigration (I-9) Forms
- Invitation to Self-Identify Disability or Veterans Status
- Safety Training Records

Employees may contact the [Director, Contracts & Operations](#)~~Human Resources Manager~~ to request a time to review their personnel files. With reasonable advance notice, an employee may review their own records in the Organization's offices during regular business hours and in the presence of an individual appointed by the Organization to maintain the records. No copies may be made of documents in anyone's file, except for documents that the employee has previously signed. If an employee wishes to dispute comments in their files, they may do so in writing.

REFERENCES

By policy, the Organization will provide only the former or present employee's dates of employment and position(s) held with the Organization. Compensation information may also be verified if written authorization is provided by the employee.

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EMPLOYEE INFORMATION

Employees are asked to help keep the Organization informed about any major change, which may affect their employment status. Important changes to report to the [Director, Contracts & Operations](#) [Human Resources Manager](#) include:

- Name
- Address
- Home telephone number
- Mobile telephone number
- Personal email address
- Marital status
- Number of dependents
- Any important health information for emergency purposes
- Emergency telephone contact and numbers (who/how to notify in case of emergency)
- Change of beneficiary or other changes to benefits/insurance
- Authorized payroll deductions (e.g., changes in tax deductions)
- Additional education and special training courses

STAFF TRAINING AND DEVELOPMENT

The Council recognizes that the skills and knowledge of its employees are critical to the success of the organization. The Council's payment or reimbursement for education and training encourages employee skill development to improve job-related skills. Payment or reimbursement will be provided for training, workshops, conferences, and tuition, required fees and/or books for education courses, with the prior approval of the manager and the Executive Director. Such training, workshops, conference and tuition (and related costs) for education courses must be related to the employee's current job duties, improvement of competencies for the current position, or a foreseeable-future position in the organization.

JOB POSTING SYSTEM

In general, notices of job openings are posted both internally and online. Such job postings are a way to inform employees of openings and to identify qualified and interested applicants who might not otherwise be known to the hiring manager.

Employees interested in applying for an open position should submit a job application and any other documents requested in the posting to the manager of the open position. To be eligible to apply for a posted job, employees must have satisfactorily completed their introductory period in their current position. Employees who have received a written warning or have been suspended within a one-year period, are not eligible to apply for posted jobs.

While the FDDC provides employees an opportunity to indicate their interest in open positions, FDDC reserves its discretionary right to make hiring decisions that are in the best interests of the Organization. Other recruiting sources may also be used to fill open positions when in the best interests of the Organization. Board member applicants must comply with the conflict-of-interest provisions of the By-Laws.

STANDARDS OF CONDUCT AND DISCIPLINE

As an at-will employer, the Organization may impose discipline whenever it determines it is necessary/appropriate. Discipline may take various forms, including verbal counseling, written warnings,

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suspension, demotion, transfer, reassignment, or termination. The discipline imposed will depend on the circumstances of each case. Therefore, discipline will not necessarily be imposed in any particular sequence. Moreover, at any time the Organization determines it is appropriate; an employee may be terminated immediately.

Every organization must have certain standards of conduct to guide the behavior of employees. Although there is no possible way to identify every rule of conduct, the following is an illustrative list (not intended to be comprehensive or to limit the Organization's right to impose discipline for any other conduct it deems inappropriate). Keep in mind that these standards of conduct apply to all employees whenever they are on Organization property and/or conducting Organization business (on or off Organization property). Engaging in any conduct the Organization deems inappropriate may result in disciplinary action, up to and including termination.

- a) Dishonesty;
- b) Falsification of Organization records;
- c) Unauthorized or careless use or possession of property, materials, or equipment that belongs to the Organization, a coworker, or the public;
- d) Possession or control of illegal drugs, weapons, explosives, or other dangerous or unauthorized materials;
- e) Fighting, engaging in violence or threats of violence, using vulgar or abusive language, horseplay, playing practical jokes or other disorderly conduct that may endanger others or damage property;
- f) Insubordination, failure to perform assigned duties or failure to comply with the Organization's health, safety or other rules;
- g) Unauthorized and/or excessive absenteeism or tardiness;
- h) Lack of teamwork, poor communication, unsatisfactory performance, unprofessional conduct, or conduct improper for the workplace;
- i) Sexual or other illegal harassment or discrimination;
- j) Unauthorized use or disclosure of the Organization's confidential information;
- k) Violation of any Organization policy;
- l) The commission of a crime;
- m) Any intentional act which adversely affects the proper functioning of the Organization's operations, services, programs, activities, and staff; and/or
- n) Being intoxicated or under the influence of alcohol or drugs while on the job.

TERMINATION OF EMPLOYMENT

An employment relationship between the FDDC and any employee is based upon the mutual consent of the employee and the Organization.

INVOLUNTARY TERMINATION OF EMPLOYMENT

It is the general policy of the FDDC to retain the services of all employees who perform their duties efficiently and effectively and abide by Organization policies. However, it may become necessary or desirable under certain conditions to terminate the employment relationship. Notice of involuntary terminations will be handled discretely. The terminated individual will be assisted by a member of management in gathering personal belongings, Organization property will be retrieved, and the employee will be escorted out of the office. Types of involuntary terminations include layoff, discharge due to performance, and disciplinary discharge. All employment is at-will; either the employee or the FDDC may terminate the employment relationship with or without notice and with or without cause within legal boundaries.

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REDUCTION IN WORKFORCE

It is the policy of the FDDC that full employment for employees shall be maintained, consistent with sound business principles. Budgetary and operational needs, however, may necessitate a decrease in the number of employees to operate efficiently. In such instances consideration will be given to each employee, in the following order: potential contribution to the ongoing or future work of the Organization; skill and competency; experience; seniority. The qualifications and performance as reflected in previous performance appraisals and other reports will be considered.

RESIGNATIONS

All resignations of employment must be in writing and forwarded to the employee's manager with a copy to the [Director, Contracts & Operations](#)~~Human Resources Manager~~. These should include the effective date (last day to be worked). An employee desiring to terminate employment is requested to abide by their employment agreement or to give two (2) weeks (i.e., 10 working days) notice--whichever is greater--in order to separate in good standing and be paid for the ²vacation portion of their accrued, unused PTO and outstanding reimbursable expenses.

The FDDC may require that an employee's resignation take effect immediately, rather than allowing the employee to complete their proposed notice period. Such an action should not be construed as a reflection of the employee's integrity or the value of their service to the FDDC, but rather as an action to protect the interests of the Organization. In such cases--when the decision to forego two-weeks of working notice is made on the part of the Organization--the employee may still be paid for the vacation portion of their accrued, unused PTO and approved expenses.

EXIT PROCESS

The employee's immediate manager or the [Director, Contracts & Operations](#)~~Human Resources Manager~~ conducts an exit interview immediately upon an employee's resignation or other form of termination of employment. At that time, the employee will be required to return all Organization property and sign an Organization Property Inventory Form. Failure to return Organization property may result in legal action. If a departing employee chooses not to participate in an exit interview, that fact will simply be noted in their personnel file.

Examples of company property are:

| | |
|--|----------------------------|
| Office keys or access cards | Printers/Copiers |
| All Organization materials | Cell phones |
| Organization credit cards | Manuals, Employee Handbook |
| Equipment: laptops, computer equipment | ID badge |

IMMIGRATION LAW COMPLIANCE

In compliance with the Immigration Reform and Control Act of 1986, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 on the date of hire and present documentation establishing identity and employment eligibility within three business days of date of hire. Former employees who are rehired must also complete an I-9 form if they have not completed an I-9 form with the Organization within the past three years, or if their previous I-9 form is no longer retained or valid. Anyone may raise questions or complaints about immigration law compliance without fear of reprisal.

² The "vacation portion" of PTO is 2/3 of the total time accrued/unused at the time of separation.
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PERFORMANCE EVALUATIONS

Optimum development and proper utilization of each employee is essential to the continued success of the Organization. "How am I doing?" is often one of the most urgent questions on an employee's mind. Providing factual and objective answers to this question is an effective means of enhancing employee development and sustaining good morale.

A major objective of the FDDC management is to ensure that performance evaluations facilitate specific, objective, constructive feedback to provide an accurate assessment of how an employee is doing.

New employees may receive frequent feedback during their first three (3) months on board in order to maximize their chances for success and/or to improve specific behaviors. Normally, they will be asked for their perspectives and given an actual performance appraisal after completing two (2) or three (3) months. This will give them a good idea on what bases performance is measured for the annual review and what objectives they should focus on achieving.

The performance of every employee is formally reviewed at least once every twelve (12) month period. As a general rule, annual performance evaluations are conducted in late summer or early fall. Interim reviews may also be conducted mid-year or more frequently. For example, performance reviews may be done if deemed advisable by management to ensure that responsibilities are understood and are being accomplished; if an employee's duties change substantially at any time after the annual review; to document especially outstanding performance, warranting special attention; and/or when performance is not at an acceptable level.

PERFORMANCE IMPROVEMENT

In the event that an employee's performance falls below standard, improvement may be managed through the Performance Improvement Plan (PIP). The PIP is managed by the employee's manager and/or the Executive Director who sets the performance targets, objectives and/or competencies and the time frame for improvement. In conjunction with their manager, the employee is expected to develop a plan detailing the activities and actions to attain the agreed performance objectives.

If the employee meets the performance objectives and/or competencies within the time frame, the manager and/or Executive Director will sign off the PIP as completed (unless the performance improvement was not judged sufficient). The employee is then expected to sustain this level of performance thereafter through the normal practice of self-managed development.

EFFECT OF PERFORMANCE RATINGS ON PAY

Performance is a key factor in determining wages and advancement opportunities within the FDDC. However, a performance review does not mean that a wage increase, or advancement is imminent. Merit-based pay adjustments may be awarded by the FDDC in an effort to recognize truly superior employee performance. The decision to award such an adjustment is dependent upon numerous factors, including the market rate for the position the employee fills and information documented by this formal performance evaluation process.

EMPLOYEE BEHAVIOR

POLITICAL NEUTRALITY

Maintenance of individual freedom and our political institutions necessitates broad scale participation by citizens concerning the selection, nomination and election of our public office holders. The

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Organization will not discriminate against any employee because of identification with and support of any lawful political activity. Organization employees are entitled to their own personal political position. However, if an employee is engaging in political activity—whether online or otherwise—s/he should always make it clear that their actions and opinions are their own and not necessarily those of the Organization, and that s/he is not representing the Organization. Also, please keep in mind that discussing politics (and/or religion) in the workplace often fosters umbrage and should be avoided.

EMPLOYEE SAFETY & HEALTH

FDDC provides information to employees about workplace safety and health issues through bulletin board postings, emails, memos, or other written communications.

Each employee is expected to obey safety rules and to exercise caution in all work activities. Employees must immediately report any unsafe condition to the [Director, Contracts & Operations](#). Employees who violate safety standards, who cause hazardous or dangerous situations, or who fail to report or, where appropriate, and remedy such situations, may be subject to disciplinary action, up to and including termination of employment.

In the case of accidents that result in injury, regardless of how insignificant the injury may appear, employees should immediately notify the appropriate manager and/or the [Director, Contracts & Operations](#). Such reports are necessary to comply with laws and initiate insurance and workers' compensation benefits procedures.

ATTENDANCE

Punctuality and regular attendance are essential to the successful operation of the Organization. If an employee is unable to report to work (or to report to work on time) for any reason, the employee must notify their manager before their starting time. If an employee desires to leave work for any reason during the workday, the employee must obtain the approval of their manager prior to leaving. In the event that the employee fails to call their manager or report for work for 3 consecutive workdays, the employee will be deemed to have voluntarily resigned from their employment with the Organization and will be removed from the payroll. Excessive absenteeism or tardiness will be reflected in performance evaluations and may subject the employee to disciplinary action, up to and including termination.

DRUG AND ALCOHOL ABUSE POLICY

In compliance with the Drug-Free Workplace Act of 1988, the FDDC has a longstanding commitment to provide a safe, quality-oriented and productive work environment. Alcohol and drug abuse pose a threat to the health and safety of the FDDC employees and to the security of the Organization's equipment and facilities. For these reasons, the FDDC is committed to the elimination of drug and alcohol use and abuse in the workplace.

The Drug and Alcohol Abuse Policy applies to all employees and all applicants for employment of the FDDC. The [Director, Contracts & Operations](#) is responsible for policy administration.

Employee Assistance. Please see the complete **Drug and Alcohol Abuse Policy** in the Appendix of this Handbook.

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MEDICATION

An employee placed on any medication by a physician that may affect their behavior while acting on behalf of the Organization—including but not limited to medical marijuana—should report that fact to management. Depending on the job duties and possible effects, the employee may be required to provide a release form from the prescribing physician indicating that the employee is able to perform their job safely and efficiently in a routine manner.

SMOKING

The Organization seeks to foster the health and safety of all its employees and visitors. Smoking poses a significant risk to the health of the user; and secondhand smoke can be hazardous to non-smokers. All applicants and employees are forbidden to smoke or use tobacco products in any office area. Anyone wishing to smoke must do so outside of the office building either during their lunch break or during one of their 15-minutes breaks. All employees shall abide by the terms of the non-smoking workplace policy as a condition of employment.

ZERO TOLERANCE OF VIOLENCE POLICY

ENDANGERMENT OR THREATS

The Organization encourages a congenial work environment of respect and professionalism but also has a high level of responsibility for the safety and wellbeing of the employees, visitors, and the public. Therefore, the Organization takes any type of endangerment to the staff or others in the Organization offices or worksites very seriously. Protecting the wellbeing of everyone involved with the FDDC is of paramount concern. The Organization prohibits employees, contractual and/or temporary workers from intentionally harming or threatening to harm others (e.g., employees, contractual and/or temporary workers, job candidates, vendors, visitors) or property belonging to others. This prohibition includes but is not limited to intentional acts such as:

- Physically harming others
- Verbally abusing others
- Using intimidation tactics and making threats

Violation of this Policy will result in disciplinary action up to and including termination of employment and or contractual relationship of any kind.

POSSESSION OF WEAPONS

Possession of weapons on Organization premises including, but not limited to firearms and knives, presents the possibility of menace and, therefore, is in violation of our Policy. Possession includes, on the person, in a desk, locker, and/or any other personal storage area on the premises. Premises include all buildings and other facilities owned, rented, or used by the Organization to conduct its operations plus all work sites to which employees, contractual and/or temporary workers are assigned in the course of the performance of their duties for the Organization.

The possession of weapons on Organization premises—except if specifically required in carrying out bona fide job responsibilities—is proper cause for administrative or disciplinary action up to and including termination of employment and/or contractual relationship of any kind.

PROACTIVE STANCE

All employees are responsible for:

- Refraining from acts of violence

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- Seeking assistance to peacefully resolve personal issues that may lead to acts of violence in the workplace
- Reporting any dangerous or threatening situations that occur in the workplace.

Employees are encouraged to report situations that occur outside of the workplace that may affect workplace safety (e.g., instances where protective orders have been issued) to their immediate manager or the [Director, Contracts & Operations](#). ~~Human Resources Manager~~. Reports of violence will be evaluated immediately, and appropriate action will be taken where possible.

When a violent act occurs in the workplace, employees should **CALL 911** first and then either their immediate manager or the [Director, Contracts & Operations](#). ~~Human Resources Manager~~.

WORKPLACE SEARCHES

For the safety and security of both the Organization and all employees, all offices, desks, file drawers, cabinets, lockers, and other Organization equipment (including but not limited to computers, e-mail and voicemail) and facilities or any area on Organization premises are the property of the Organization ("Organization property"). Employees should have no expectation of privacy with respect to Organization property and/or items stored within Organization property or on Organization premises.

An employee may be required to submit to an inspection of any possessions or articles brought onto the organization's premises if there is evidence that these items may potentially be involved in the threat of violence, unlawful substances or items prohibited in the workplace.

Persons entering the premises who refuse to cooperate in an inspection conducted pursuant to this policy may not be permitted to enter the premises. All employees must cooperate in an inspection; failure to do so is insubordination and will result in disciplinary action, up to and including termination.

INTERNET, EMAIL AND COMPUTER USE POLICY

The Organization uses various forms of electronic communication including, but not limited to computers, email, telephones, voicemail, instant message, text message, Internet, cell phones and smart phones (hereafter referred to as "electronic communications"). The electronic communications, including all software, databases, hardware, and digital files, remain the sole property of the Organization and are to be used only for Organization business and not for personal use.

The following rules apply to all forms of electronic communications and media that are: (1) accessed on or from Organization premises; (2) accessed using the Organization computer or telecommunications equipment, or via Organization-paid access methods; and/or (3) used in a manner which identifies the Organization. The following list is not all-inclusive, and the Organization may implement additional rules from time to time.

- a. Electronic communication and media may not be used in any manner that would be discriminatory, harassing, or obscene, or for any other purpose that is illegal, against Organization policy, or not in the best interest of the Organization. Employees who misuse electronic communications and engage in defamation, copyright or trademark infringement, misappropriation of trade secrets, discrimination, harassment, or related actions will be subject to discipline, up to and including termination. Employees may not install personal software on Organization computer systems.

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- a. Employee's own electronic media may only be used during breaks. All other company policies, including the Organization's no tolerance for discrimination, harassment, or retaliation in the workplace apply.
- b. All electronic information created by any employee on Organization premises or transmitted to Organization property using any means of electronic communication is the property of the Organization and remains the property of the Organization. No one should assume that any electronic communications are private or confidential and should transmit personal sensitive information in other ways. Personal passwords may be used for purposes of security, but the use of a personal password does not affect the Organization's ownership of the electronic information. The Organization will override all personal passwords, if necessary, for any reason.
- c. The Organization reserves the right to access and review electronic files, messages, internet use, blogs, "tweets," instant messages, text messages, email, voice mail, and other digital archives, and to monitor the use of electronic communications as necessary to ensure that no misuse or violation of Organization policy or any law occurs. All such information may be used and/or disclosed to others, in accordance with business needs and the law. The Organization reserves the right to keep a record of all passwords and codes used and/or may be able to override any such password system
- d. Employees are not permitted to access the electronic communications of other employees or third parties unless directed to do so by Organization management. No employee may install or use anonymous e-mail transmission programs or encryption of e-mail communications.
- e. Employees who use devices on which information may be received and/or stored, including but not limited to cell phones, cordless phones, portable computers, fax machines, and voice mail communications are required to use these methods in strict compliance with the Confidentiality section of this Handbook. These communications tools should not be used for communicating confidential or sensitive information or any trade secrets.
- f. Access to the Internet, websites, and other types of Organization-paid computer access are to be used for Organization-related business only. Any information about Florida Developmental Disabilities Council, Inc., its products or services, or other types of information that will appear in the electronic media about the Organization must be approved before the information is placed on any electronic information resource that is accessible to others.

SOCIAL MEDIA POLICY

The Organization is committed to utilizing social media to enhance its profile and reputation, to listen and respond to customer opinions and feedback, and to drive revenue, loyalty and advocacy. We encourage employees to support our activities through their personal social networking channels while adhering to the guidelines outlined in this section.

Employees must be sensitive to the confidential nature of the work done at the FDDC. While discussing work-related matters through social media sites/means may be tempting, employees must keep the following guidelines in mind whenever contributing to online social computing platforms where there are references to or a potential impact on the FDDC. Violations of the Social Media Policy guidelines may result in disciplinary action up to and including termination of employment.

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OVERALL PHILOSOPHY

While employees are on Organization time, they must refrain from online activities that are not included in their primary job description responsibilities.

BLOGGING

Employees should remember that online activities may reflect on both the employee and the Organization. The ability to publish things that may never go away and can be forwarded endlessly should be carefully considered.

Most online social computing platforms are like public marketplaces—what is “out there” is available for all to see. On social platforms, the boundaries of professional and personal information are not always very clear. In these days of shifting privacy policies and powerful search engine indexing, one cannot always be sure what is being shared, viewed, or archived. Note that what is published online will be public for a very long time. What people post should reflect how they want to be perceived by friends, family, colleagues, and clients.

A good “rule of thumb” is, *“If you are unsure whether certain content is appropriate to share online, then don’t post it.”* It’s better to be safe than sorry.

RESPONSIBILITY

Each person using social media is personally responsible for their words and actions. Employees must be diligent in making it clear that they are speaking as individuals and not on behalf of the FDDC. For example, if the Organization might be identified in any way, the employee should use a disclaimer such as “The views expressed on this site are my own and not those of Florida Developmental Disabilities Council.”

Where applicable law permits, know that the Organization reserves the right to monitor use of social platforms and take appropriate action to protect against misuse that may be harmful to the Organization’s reputation.

Establishing an Organization account or becoming an official Organization representative that shares information about the Organization and the areas we work in, requires approval from Organization top management. Only these approved accounts may display the Organization logo. If an employee would like to represent the FDDC or create an Organization account, they must contact top management. If a member of the press or online media contacts an employee about online content concerning the FDDC, the employee must refer them to top management.

CONFIDENTIALITY

Employees’ behavior online should be consistent with Organization business ethics, conflict of interest policies, and with the non-disclosure/confidentiality agreement that each employee has executed with the Organization.

Employees should not disclose information about clients, vendors, suppliers, colleagues or other persons nor misuse their personal data, or publish their photos without their permission.

CONDUCT

Employees are asked not to engage in any conduct online that would not be acceptable in the workplace or that is unlawful. For example, making derogatory remarks, bullying, intimidating, harassing others,

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insulting, or posting content that is unkind, slanderous, threatening, discriminating, or pornographic would be unacceptable.

COPYRIGHTS & INTELLECTUAL PROPERTY RIGHTS

Employees must comply with laws and regulations and more particularly with laws governing intellectual property rights, including copyrights and trademarks. Employees must not post content or take any action that violates the law or infringes the Organization's or any third party's intellectual property rights.

MEDIA RELATIONS POLICY

Only the Executive Director or designated member of the Council is authorized to speak with media representatives concerning any aspect of FDDC operations/situations.

CELL PHONE POLICY

The Organization discourages the use of personal cell phones while an employee is at work. Personal calls, personal instant messaging, personal text messaging, tweeting or twittering, and use of personal blue tooth devices during the workday--regardless of whether the equipment used is Organization-provided or not--interferes with employee productivity and is distracting to others. Employees are at work essentially to provide value to the Organization. They are expected to limit personal interactions during work time and make personal calls and/or send personal text messages, twitter, or IM messages on non-work time and to ensure that friends and family members are aware of this Organization policy.

Employees who bring personal cell phones to work **are required to keep the ringer shut off or placed on vibrate mode when they are in the office**. Personal conversations should occur away from areas where other employees are working. When cell phone use interferes with the satisfactory performance of an employee's duties or disturbs others, the privilege of using a personal cell phone at work may be taken away and other disciplinary action, up to and including termination, may be imposed.

When cell phones are used for Organization business, employees must comply with all Organization policies governing conduct, including policies prohibiting discrimination, harassment, and violence in the workplace or when acting on behalf of the Organization. When using the cell phone in a public place, employees must remember to maintain the confidentiality of any private or confidential business information. As a courtesy to others, employees must shut cell phones off or place on vibrate mode during meetings.

The Organization is not liable for the loss of personal cellular phones or other personal electronic equipment brought into the workplace.

SAFE USE OF CELLULAR PHONES

Employees whose job responsibilities include regular or occasional driving who use their own cell phones or Organization-issued cell phones for business are expected to refrain from using these directly or with blue tooth devices while driving whether for conversations or text messaging. Texting while driving is illegal in the State of Florida.

Safety must come before all other concerns. Regardless of the circumstances, including slow or stopped traffic, employees are strongly encouraged to pull off to the side of the road and safely stop the vehicle before placing or accepting a call. If acceptance of a call is unavoidable and pulling over is not an option, employees are expected to simply let the caller know that s/he is driving and will return the call as soon

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as possible. While doing this, the employee is expected to use a hands-free device, refrain from discussion, and keep their eyes on the road. Special care should be taken in situations where there is heavy traffic, inclement weather or the employee is driving in an unfamiliar area.

Employees whose job responsibilities do not specifically include driving as an essential function, but who are issued a cell phone for business use or who use their own cell phones for business, are also expected to abide by the provisions above. Under no circumstances are employees allowed to place themselves at risk to fulfill business needs.

Employees who are charged with traffic violations resulting from the use of their phone while driving will be solely responsible for all liabilities that result from such actions.

Violations of this policy will be subject to the highest forms of discipline, including termination.

As with any policy, management staff is expected to serve as role models for proper compliance with the provisions above and are encouraged to regularly remind employees of their responsibilities in complying with this policy.

VIDEO OR AUDIO RECORDING DEVICES

The use of phones with a camera or other audio or video recording capable devices within the Organization may constitute not only an invasion of employees' personal privacy but may breach confidentiality of the FDDC. Therefore, the use of camera or other video-capable recording devices on Organization premises or while acting on behalf of the Organization is prohibited without the express prior permission of the Executive Director and of the person(s) present at the time.

As with any policy, management staff is expected to serve as role models for proper compliance with the provisions above and are encouraged to regularly remind employees of their responsibilities in complying with this policy.

COMPENSATION

MERIT SYSTEM

The FDDC offers a performance-based merit system to reward employees for the execution of duties and responsibilities that meet or exceed the expectations of the Council. An employee may be eligible for a performance-based merit award taking into consideration their performance evaluation rating and their pay level within their salary grade.

Actual application of the performance-based merit awards and the amount of the awards for employees in any given year will be contingent upon the Council's allocation of funds for performance-based merit awards. In addition, FDDC is prohibited from exceeding a cap for administrative costs pursuant to federal law. Therefore, the FDDC will also not issue performance-based merit awards if such awards will cause the administrative costs to exceed or approach the federal cap.

PAYDAYS

The FDDC payroll period is a bi-weekly period consisting of two 40-hour work weeks beginning on a Monday at 12:01 a.m. and through Sunday at 12 midnight.

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All employees are paid biweekly on every other Thursday. Each paycheck will include earnings for all work performed through the end of the previous payroll period.

DIRECT DEPOSIT

Employees are required to have pay directly deposited into their bank accounts. They shall complete the written authorization form and provide it to FDDC. Employees will receive an itemized statement of wages when FDDC makes direct deposits.

OVERTIME

Non-exempt employees will be paid time and one-half for hours worked over 40 in any one workweek. All overtime work by non-exempt employees must be authorized in advance by their managers. Only hours actually worked will be used to calculate overtime pay. Examples of unauthorized overtime would be working past one's time and then asking for approval, clocking in late and making up that time without approval, etc.

PAYROLL DEDUCTIONS

The FDDC makes deductions from employee pay only in circumstances permitted by applicable law. This includes, but is not limited to, mandatory/statutory deductions for Income Tax Withholding, Social Security, and Medicare contributions.

The FDDC offers retirement and voluntary supplemental benefits beyond those required by law. Eligible employees may voluntarily authorize deductions from their paychecks to cover the costs of participation in these programs.

If an employee believes that an improper deduction has been made from their pay, they should raise the issue with the [Director, Contracts & Operations, Human Resources Manager](#) immediately. The FDDC will promptly investigate. If the investigation reveals that the employee was subjected to an improper deduction from pay, their next paycheck will contain the appropriate reimbursement.

ADMINISTERING WAGE GARNISHMENTS & ASSIGNMENTS

This will be carried out as required by Court Ordered Directives from respective Governmental Agencies.

BUSINESS TRAVEL EXPENSES

The FDDC will reimburse employees for reasonable business travel expenses incurred while on assignments away from the normal work location. All business travel must be approved in advance by the Chief Financial Officer and the employee's immediate manager.

Employees whose travel plans have been approved are responsible for making their own travel arrangements.

When approved, the actual costs of travel, meals, lodging, and other expenses directly related to accomplishing business travel objectives will be reimbursed according to FDDC's travel policy. Employees are expected to limit expenses to reasonable amounts.

Any employee who is involved in an accident while traveling on business must promptly report the incident to their immediate manager and the [Director, Contracts & Operations, Manager of Human Resources](#). Vehicles rented by FDDC may not be used for personal use without prior approval.

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Cash advances to cover reasonable anticipated expenses may be made to employees, after travel has been approved. Employees should submit a written request to their manager when travel advances are needed and follow FDDC's travel advance policy.

With prior approval, employees on business travel may be accompanied by a family member or friend, when the presence of a companion will not interfere with successful completion of business objectives. Additional costs will not be reimbursed by FDDC. Generally, employees are also permitted to combine personal travel with business travel, as long as time away from work is approved. Additional expenses arising from such nonbusiness travel are the responsibility of the employee.

When travel is completed, employees should submit completed travel expense reports within 90 days. Reports should be accompanied by receipts for all individual expenses according to FDDC's travel policy.

Employees should contact the Chief Financial Officer for guidance and assistance on procedures related to travel arrangements, travel advances, expense reports, reimbursement for specific expenses, or any other business travel issues.

Abuse of this business travel expenses policy, including falsifying expense reports to reflect costs not incurred by the employee, can be grounds for disciplinary action, up to and including termination of employment.

AUTOMOBILE USE/EXPENSE REIMBURSEMENT.

Each employee who uses their personal automobile for Organization travel/business is required to have a valid driver's license and auto insurance coverage as required by the State and the Organization and must agree to keep it fully in force on any vehicle used for Organization business during the term of employment. The Organization has the right to request proof of a valid driver's license and insurance at any time and the employee is required to follow all Organization requirements and state and local laws.

When an employee is commuting to and from work during their designated work hours, the Organization is not responsible for any accident or injury that may occur during the commute. If an employee decides to make a personal errand during work hours and is not taking part in any Organization-related activities, the employee agrees that it will not make a claim against the FDDC. It is important to review the safety measures and requirements for all employees who take part in using personal vehicles during Organization time. These measures include but are not limited to:

SAFETY MEASURES

- a) No texting or talking on the phone while driving
- b) Abide by all rules of the road and traffic laws
- c) NO driving under the influence (alcohol and drug use)
- d) Wear seatbelt at all times while driving

REQUIREMENTS FOR PERSONAL VEHICLE USAGE:

- a) Valid driver's license
- b) In force auto insurance
- c) Legally registered vehicle

MILEAGE REIMBURSEMENT

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1. Employees will receive the standard mileage rate as determined by the Internal Revenue Service for business travel when an employee uses a personal automobile on Organization business.
2. Documentation of business miles shall be submitted on the form designated by the Organization in accordance with established guidelines for calculating mileage and timeframes for submission of the form.
3. Employees using public transportation shall submit requests for reimbursement on FDDC's travel reimbursement form.

OTHER EXPENSES REIMBURSEMENT

1. Employees may receive reimbursement for telephone, parking, and certain expenses related to the performance of their work when prior approval is received from the appropriate manager. All reimbursable expenses shall be accompanied by a receipt and submitted for reimbursement within 30 days. The Organization reserves the right to deny a reimbursement expense if proper documentation is not provided. The Organization has a full work week to reimburse the employee the appropriate amount expensed. Any falsification of expense reports will be grounds for immediate dismissal from employment.
2. Employees shall receive expense reimbursement for transportation and travel expenses when attending approved conferences, conventions and meetings.
3. Compensation in the form of per diem and transportation expenses shall be based on the IRS rates for the locality and must be approved in advance by the appropriate manager.

CORPORATE CREDIT CARDS

A corporate credit card may be issued to an employee of FDDC at the discretion of the Executive Director. If such a card is issued, it shall be with the clear understanding that the Organization's policies and procedures related to credit card use are followed. The card may be used only to charge legitimate, reasonable business expenses necessarily incurred during the course and in the scope of employment. The corporate credit card may not be used to charge items or services for personal use or benefit.

Every employee, upon issuance of a corporate credit card, shall sign a form acknowledging their understanding of, and agreement to abide by, the corporate credit card policy. The form shall be maintained as a part of the employee's personnel file.

EMPLOYEE BENEFITS AND SERVICES

The following is a list of benefits that the FDDC makes available to eligible employees. The [Director, Contracts & Operations](#) will share the details of the programs with employees and offer access to the separate Summary Plan Descriptions (SPDs), as well. Benefits may be modified, added or terminated at any time by the insurance company or the provider, per the terms of the plan, or by the FDDC, at its discretion.

Eligible employees at FDDC are provided a wide range of benefits. Benefits eligibility is dependent upon a variety of factors, including employee status and length of employment. The [Director, Contracts & Operations](#) can identify the programs for which each employee is eligible.

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The following benefit programs are available to eligible employees:

- * Health and Dental Insurance
- * Life Insurance
- * Short-Term Disability
- * Long-Term Disability
- * 401(k) Savings Plan
- * Paid Time Off (PTO)
- * Flex Time
- * Holidays
- * Jury/Witness Duty Leave
- * Bereavement Leave
- * Military Leave
- * Personal Leave of Absence
- * COBRA
- * Workers Compensation Insurance
- * Social Security Benefits
- * Unemployment Insurance

MEDICAL AND DENTAL INSURANCE

FDDC offers medical and dental insurance plans. Full-time regular employees may enroll in the medical and dental plans effective on the first day of the month following date of hire.

Eligible employees may participate in the medical insurance and dental plans subject to all terms and conditions of the agreement between FDDC and the insurance carrier. Details of the medical insurance and dental plans are described in the Summary Plan Description (SPD). An SPD and information on cost of coverage will be provided in advance of enrollment to eligible employees. Contact the [Director, Contracts & Operations](#) ~~Human Resources Manager~~ for more information about medical and dental insurance benefits.

LIFE INSURANCE

Life insurance offers employees and their families important financial protection. The FDDC provides a \$50,000 group term life insurance plan for eligible employees. Accidental Death and Dismemberment (AD&D) insurance provides protection in cases of serious injury or death resulting from an accident and is provided as part of the basic life insurance plan.

Full-time regular employees are eligible to sign up for life insurance and AD&D effective on the first day of the month following date of hire. Eligible employees may participate in the life insurance plan subject to all terms and conditions of the agreement between FDDC and the insurance carrier.

Details of the group term life insurance plan including benefit amounts are described in the Summary Plan Description provided to eligible employees. Employees should contact the [Director, Contracts & Operations](#) ~~Human Resources Manager~~ for more information about life insurance benefits.

SHORT-TERM & LONG-TERM DISABILITY

The FDDC provides short-term disability (STD) benefits and long-term disability (LTD) plans to eligible employees who are unable to work because of a qualifying disability due to an injury or illness. Full-time regular employees are eligible to participate in the STD and LTD plans effective on the first day of the month following date of hire.

Eligible employees may participate in the STD and LTD plans subject to all terms and conditions of the agreement between FDDC and the insurance carrier.

Disabilities arising from pregnancy or pregnancy-related illness are treated the same as any other illness that prevents an employee from working.

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Details of the STD and LTD benefits plans including benefit amounts, when they are payable, and limitations, restrictions, and other exclusions are described in the Summary Plan Description provided to eligible employees. Employees should contact the [Director, Contracts & Operations](#)~~Human Resources Manager~~ for more information about STD and LTD benefits.

SUPPLEMENTAL/VOLUNTARY INSURANCE

The Organization also pays up to \$80 per pay period for full-time regular employees to cover the cost for a variety of Supplemental/Voluntary Insurance plans through a vendor selected by the Organization (e.g., Aflac): such as cancer, hospitalization, accident, life, long-term & short-term disability, etc. Costs for the insurance plans selected which exceed the \$80 per pay period allotment from the Organization are taken as pre-tax deductions from the employee's pay; and, therefore, reduce the amount of taxable income for people who buy these. The exception would be if an employee specifies that s/he wants to purchase additional long or short-term disability insurance with post-tax dollars in order not to have to pay taxes on disability payments if these are made in the future. If an employee chooses not to purchase Supplemental/Voluntary Insurance or selects insurance which does not cost the full \$80 allotment, the monies not so consumed will be applied to the employee's medical insurance premium.

401(K) PLAN

FDDC has established a 401(k) savings plan to provide employees the potential for future financial security for retirement.

To be eligible to enroll the 401(k) savings Plan, an employee must be 21 years of age or older; have worked for the FDDC for one year; and have worked at least 1,000 hours. Employees who meet these criteria may enroll in the Plan the first day of the month following achievement of eligibility requirements and participate in the 401(k) Plan subject to all terms and conditions of the Plan.

The 401(k) savings Plan allows employees to elect how much pre-tax salary they want to contribute up to the statutory limit and direct the investment of their Plan accounts. Because contributions to a 401(k) Plan are automatically deducted from pay before federal and state tax withholdings are calculated, Plan participants save tax dollars. At the time distributions are made, the theory is that the Plan participant's tax rate will be lower/more favorable.

FDDC contributes a one-to-one percentage match up to 6% of the enrolled employee's gross annual pay into a retirement account. The vesting schedule for monies contributed by the FDDC is as follows:

| | |
|---|------|
| Completion of 2 nd year of the Organization's contribution | 50% |
| 3 rd year of the Organization's contribution | 100% |

Complete details of the 401(k) savings plan are described in the Summary Plan Description provided to eligible employees. Contact the [Director, Contracts & Operations](#)~~Human Resources Manager~~ for more information about the 401(k) plan.

PAID TIME OFF (PTO)

PTO is essentially an accumulation of paid time off work. The appropriate accrual is made for each regular full-time employee of the FDDC based on length of service with the Organization. This leave

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account is used for vacations, ³sickness (for the employee or for the care of immediate family members), religious holidays not observed by the Organization, and other personal matters. Planned absences (vacation, personal business, etc.) should be approved by the employee's manager well in advance (e.g., two weeks or more).

PTO BALANCES

The following table summarizes the PTO balances that accrue for use by regular full-time employees each calendar year (January 1st through December 31st).

| Length of Service Calendar Year | Balance of Hours | Hours Per Accrued Bi-Weekly Pay Period | ⁴ Carryover of Unused Hours PTO Allowed (to next benefit year) |
|------------------------------------|---------------------|---|---|
| Year Hired | | 7.08 | 50% of accrual |
| First Full Year – Year 5 | 184 | 7.08 | 92 hours |
| Years 6 – 10 | 240 | 9.23 | 120 hours |
| Years 10 - 15 | 264 | 10.154 | 132 hours |

For all employees, length of service is calculated from Date of Hire (i.e., anniversary date in job). Accrual begins during the first full month of employment (e.g., an employee starting work on June 10 would begin accruing PTO in July).

When length of service entitles an employee to a new PTO category (e.g., from Year 5 to Year 6), the rate of accrual will change on the employee's anniversary date.

REGULAR PART-TIME EMPLOYEES

PTO will be reduced (prorated) for regular part-time employees and/or those on ⁵leaves of absence or other breaks in service. For example, a regular part-time employee working an average of 30 (thirty) hours each week will accrue at the rate of 75% of the rate of a regular full-time employee and will be allowed carryover on the same prorated basis. Other part-time employees, temporary employees, and contractor workers do not accrue PTO. PTO does not accrue during leaves of absence.

NEW HIRES

A new hire begins accruing PTO for the first full month worked and may utilize PTO after satisfactorily completing their Introductory Period (usually ninety [90] days of satisfactory employment) with the permission of their immediate manager.

SICKNESS

Employees who are ill—most especially if their illness is potentially contagious—are encouraged not to report to work. In fact, individuals who appear to be ill/contagious will be asked to return home if they do report to work.

³ Because of the impact on the Organization, PTO absences which are unplanned (e.g., illnesses, family emergencies, etc.) should normally not exceed five (5) occurrences in a year. See the guidelines below for requesting/reporting absences for sickness.

⁴ The Organization encourages employees to take time off for rest and rejuvenation. So, commencing in calendar year 2022, carryover will be capped at one-half of the hours which the employee accrues for PTO. Exceptions will be considered by the Council only for extraordinary circumstances.

⁵ Exception to prorating PTO for breaks in service are absences due to bona fide Military Leaves pursuant to federal law.

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However, there are still proper procedures to follow if an employee is ill and must miss work.

- The employee should contact the office at least an hour **prior** to the start of their normal working day. The employee should keep the Organization informed ⁶**daily** of their progress and likely return date.
- Employees should ensure that their sickness absence is recorded accurately for recordkeeping purposes.
- Please note that, if an employee is off work due to sickness for more than three (3) days, a fitness to return to work statement/certification may be required by the Organization from the employee's attending physician.
- For cases of sickness resulting in an absence of seven (7) days or more, the affected employee may be required to submit a completed self-certification form together with a doctor's certificate. A copy of such documents will be retained in a separate medical file by management.

THE EFFECT OF TERMINATION ON PTO

If an employee utilizes PTO beyond their entitlement and, then, their employment with the FDDC is terminated—for any reason—s/he will be responsible for paying back PTO to which s/he was not entitled. It is understood that such unearned paid time off work will be withheld from the employee's final paycheck.

Employees who leave the FDDC may receive pay for the calculated ⁷**vacation portion** of any accrued unused PTO. Payout of accrued, unused PTO will be at the discretion of top management, based upon the circumstances involved in each individual case (e.g., sufficient notice being given, cause for termination, etc.)

FLEX TIME

Flexible work arrangements are not appropriate for all employees or positions and are not a guaranteed employee benefit. Prior management approval is required [before an employee may adjust their work schedule](#).

General Guidelines

- **Supervisor Notification & Approval:** Employees must inform and receive approval from their supervisor before working outside of their normal schedule.
- **Required Meetings & Availability:** Employees must still attend all mandatory meetings and remain available during core business hours as required by their role.

⁶ An exception to daily status reports during a period off work for illness would be when the attending physician has provided a written authorization covering a specific period of time required for treatment or recuperation. Even then, the FDDC may require updates from the physician.

⁷ For payout calculation purposes, the "vacation portion" of PTO is 2/3 of accrued/unused PTO at time of termination of employment.

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- Tracking & Accountability: Employees must accurately record their time and ensure their schedule does not create disruptions to team operations or service delivery.

Non-Exempt Employees (Hourly)

- Employees who work less than forty (40) hours in a workweek may make up time only within the same workweek, pursuant to federal law.
- Supervisors may require documentation or approval for any schedule adjustments.
- Overtime must be pre-approved and is subject to standard payroll policies.

Exempt Employees (Salaried)

- Employees who work more or less than an eight (8) hour day may make up time within the same pay period or, with special permission, within a different pay period.
- Flexible scheduling must not interfere with job performance, deadlines, or team collaboration.

Eligibility & Considerations

To be approved for a flexible work schedule, employees must:

- Maintain a satisfactory attendance record.
- Meet all performance expectations in their current role.
- Consistently demonstrate the ability to complete tasks on time.
- Ensure their work schedule does not cause significant disruption to performance or service delivery.

Failure to comply with these guidelines may result in revocation of flexible work privileges and/or corrective action.

~~Non-exempt employees who work less than forty (40) hours in a workweek may make up the time only during that same workweek pursuant to federal law; and supervision may be required. Exempt employees who work more or less than an eight (8) hour day may make up time during the same pay period or with special permission, during a different pay period. In order for a flexible work schedule to be approved, the employee must have a satisfactory attendance record, meet all performance expectations in their current role and consistently demonstrate the ability to complete tasks and assignments on a timely basis. The nature of the employee's work and responsibilities must be conducive to a flexible work arrangement without causing significant disruption to performance and/or service delivery.~~

PTO REQUESTS

All requests for PTO must be submitted by the employee to their Supervisor for approval. The PTO taken off work must be reported properly on the employee's time sheet for that period.

Individuals may utilize and report PTO usage in increments of no less than one (1) hour. Leave Request Forms may be obtained from Supervisors or Human Resources.

A maximum of ten (10) business days' use of PTO may be requested at one time. At the employee's

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request and the Organization's consent (written authorization from the Manager and Executive Director), longer-term leaves may be approved.

PTO is paid at the employee's base pay rate at the time of absence. PTO time is not counted as time worked for overtime calculation purposes.

HOLIDAYS

The Organization observes the following paid holidays for regular full-time and regular part-time employees:

- New Year's Day
- Martin Luther King Day
- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve
- Christmas Day
- Floating holiday

Holiday pay for regular full-time and regular part-time employees will be calculated based on the employee's base pay rate (as of the date of the holiday) times the number of hours the employee would otherwise have worked on that day.

If an eligible employee works on a recognized holiday with Organization approval, s/he will receive holiday pay plus wages at their straight-time rate for the hours worked on the holiday.

JURY/WITNESS DUTY

Any employee summoned to serve on a jury or subpoenaed to appear as a witness in a court trial must provide a copy of the summons/ subpoena to their manager and/or to the [Director, Contracts & Operations](#)~~Human Resources Manager~~ at least five (5) days in advance. The Organization will grant paid jury duty leave for up to one (1) full work week. ⁸If an employee must serve on a jury or as a witness for longer than one (1) full work week, s/he should contact the [Director, Contracts & Operations](#)~~Human Resources Manager~~ to work out arrangements. Employees must submit proof of jury duty service within seven (7) days of end of service.

EXCEPTION: No employee will receive jury duty/witness duty pay to attend a trial in which s/he is a plaintiff or defendant or in which s/he is testifying for a fee as an expert witness. In these cases, the employee must use PTO or take leave without pay.

⁸ If an employee is selected to serve on a jury that is required to serve longer than one month, the employee will be placed on a Leave of Absence for the duration. During that time, the Organization will pay the employee's share of health/dental insurance costs. The employee is required to return to work immediately upon the conclusion of their jury duty at which time, the employee is guaranteed their job or a comparable position with commensurate compensation.

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BEREAVEMENT LEAVE

Regular full-time and regular part-time employees are entitled to paid time off if there is a death in the immediate family. Immediate family includes spouse, parent, child, sibling, grandparent, grandchild, or in-laws. Step-relatives and relatives by adoption are included. The amount of time allowed off work for such situations typically is three (3) workdays.

FITNESS FOR DUTY LEAVE

Paid time off is also permitted for an examination to determine one's fitness for duty in any of the federal military forces. Such leave will be granted in accordance with the State of Florida and federal laws, provided all legal requirements are. The employee must provide advance notice of the need for such leave.

MILITARY LEAVE

The FDDC will grant military leaves of absence as required by law and by the needs of employees who are members of the military service. Any regular full-time or regular part-time employee (excluding temporary employees or contractors) who is called for training, or to active military duty, will be granted a military leave of absence provided they give the Organization sufficient notice of their military obligations. The duration of the leave will be the term of enlistment plus any additional time that may be required by the government. It will include a reasonable allowance of time for travel and adjustment. These leaves are unpaid time off work.

Re-enlistment, or any other voluntary extension of the tour of duty, may affect the leave of absence. On return from military leave of absence, full-time employees will be reinstated as required by law, subject to these conditions:

1. The employee must apply for reinstatement within the time required by law.
2. If the employee's former job is not available, the Organization will provide a job of similar status, seniority, and pay.

Adjustments and exceptions to this policy may be made as circumstances require.

A full-time employee with **one (1) full year of service**, who is a member of a military reserve unit that is required to attend a two-week training session annually, is provided with a plan that allows performance of that obligation without loss of income. The Organization will pay the difference between the normal pay and the amount received in military pay for the two-week period. When the employee returns from military duty, s/he simply presents the military reserve pay voucher to Human Resources and the Organization will arrange for the payment.

For longer-term periods of time on active duty, a full-time regular employee is entitled, upon return to the Organization, to reinstatement of their former position, and a bridging of "years of service" as it applies to qualifying for Organization benefits.

Employees on federal military leave may be entitled to continue health insurance benefits, at the employee's expense, for up to twenty-four months from the date of military departure.

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FAMILY AND MEDICAL LEAVE ACT POLICY

Any employee who has worked for the Organization for at least 12 months and has at least 1,250 hours of service may apply for unpaid FMLA leave. An employee is not entitled to a leave under this policy during the first year of employment. **Please see the complete FMLA Policy in the Appendix of this Handbook.**

PERSONAL LEAVE OF ABSENCE

An employee may request a personal unpaid leave of absence from the Organization. The employee should request such a leave in writing at least thirty (30) days in advance, when possible to do so. Such leaves must receive prior approval and are granted solely at the discretion of management based on the Council's business needs and operations requirements. The Organization will not guarantee to hold the employee's position for a personal leave of absence.

During any approved personal leave of absence, the employee is responsible for the payment of all insurance premiums for their individual coverage and dependent health insurance coverage (if applicable). This money should be paid to the Organization by the first day of each month that the employee is on an approved personal leave of absence.

The employee will retain their original employment date, showing no interruption in service for leaves of less than sixty (60) days in duration. Otherwise, an adjusted date of employment will be calculated.

Credit for paid time off will not accrue during an approved personal leave of absence and time off work that would, otherwise, be paid for holidays and so forth is not paid to an employee while s/he is on an approved personal leave of absence.

CATASTROPHIC PAID TIME OFF POLICY

FDDC provides Catastrophic Paid Time Off for eligible employees who are experiencing a catastrophic health-related condition. Catastrophic Paid Time Off continues to pay eligible employees when they are on approved Personal Leave of Absence due to verifiable medical reasons, are experiencing a catastrophic health-related condition, and have exhausted all other accrued leave and welfare programs such as worker's compensation, short-term disability, and long-term disability. If the employee qualifies for an FMLA leave and that time has not already been exhausted, the FMLA leave would run concurrently with the Catastrophic Paid Time Off Policy.

A catastrophic health-related condition is defined as an incapacitating/debilitating medical condition of the employee or their immediate family member necessitating continuing treatment by a health care provider and requiring the employee's absence from work. An immediate family member includes spouse, child, parent, and stepparent. Medical certification is required that states the diagnosis and probable duration of the condition; verifies the severity or extraordinary nature of the condition, including the need for continued medical treatment; and provides the expected duration of the employee's or immediate family member's condition.

ELIGIBILITY

Catastrophic Paid Time Off must be approved by the Executive Director. Approval of Catastrophic Paid Time Off will be based on the provisions of this policy and take into consideration the employee's work/performance history.

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To be eligible for Catastrophic Paid Time Off, the employee must meet the following criteria:

- The employee must have been employed for at least one year.
- The employee must have exhausted all accrued leave (Paid Time Off).
- The employee must have been approved for a Personal Leave of Absence for verifiable medical reasons. Note that not all employees approved for a Personal Leave of Absence due to medical reasons will be eligible for Catastrophic Paid Time Off.

Catastrophic leave paid is only available if/when an employee has exhausted worker's compensation, and/or other income replacement(s) such as short-term or long-term disability.

Employees approved for Catastrophic Paid Time Off will be paid at two-thirds (2/3) of the employee's base pay rate at the time of absence for up to 300 hours.

NOTIFICATION

If the Executive Director authorizes Catastrophic Paid Time Off, the employee and the Council will be notified in writing in a timely fashion.

EMPLOYEE RECOGNITION

FDDC has an employee service recognition program to help promote employee engagement and loyalty by celebrating the milestones of our dedicated workforce, fostering a culture of recognition and appreciation. FDDC will recognize and reward employees for their continuous service and dedication to the organization. Employees are essential to our success, and this recognition program aims to honor their contribution over time.

All full-time and part-time employees who have completed at least 5 years of service with FDDC are eligible for service recognition awards.

Recognition awards will be given in increments for every subsequent 5 years of service. The service award will be distributed as part of the payroll in the month of the employee's service anniversary. The net payroll for the award will be the award amount. For example, if the award amount is \$500, the gross award will be trued up to allow the next amount to equal \$500.

Awardees will receive a formal congratulatory message from the organization's leadership, Council, and staff, and may be publicly acknowledged during company events, newsletters, or other appropriate platforms.

Service is measured from the employee's official start date with FDDC. Only continuous service is considered. Any approved leaves of absence (such as medical leave) will not affect the service calculation. Breaks in service will reset the employee's service count, unless otherwise determined by the organization (e.g., reinstated under special agreements).

The service recognition award is a taxable benefit and will be subject to all applicable federal, state, and local taxes. The award will be included in the employee's regular paycheck, and deductions will apply.

FDDC reserves the right to amend or terminate this policy at any time. Any changes will be communicated in advance to employees. Exceptions to this policy may be made at the discretion of senior management, depending on special circumstances.

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COBRA

When/if the FDDC employs 20 or more full-time employees, under the provisions of the Consolidated Omnibus Budget Reconciliation Act (COBRA) of 1986, if an employee is covered under the Organization's group health insurance plan(s) s/he is entitled to continue their coverage in the event that their employment with the Organization ends. **See the COBRA Notification in the Appendix of this Handbook.**

FLORIDA'S "MINI-COBRA" LAW

The State of Florida also has a "mini-COBRA" law, called the Florida Health Insurance Coverage Continuation Act, which provides a similar continuation of healthcare coverage for employees who work for small businesses with fewer than 20 employees, and who are not covered by federal requirements. Under Florida's mini-COBRA law, an employee must notify the insurer within 30 days of losing their employer-sponsored health plan that he is eligible for continued coverage, and the coverage can last for a maximum of 18 months.

WORKER'S COMPENSATION

Workers' Compensation is a state-mandated insurance benefit paid for by the Organization. It provides compensation for accidental injuries or death suffered in the course of employment. An employee who suffers an injury or illness in connection with their job should report the injury/illness immediately to their manager and to Human Resources. Failure to do so may affect the viability of the employee's claim. **Please see the Worker's Compensation Process in the Appendix of this Handbook.**

SOCIAL SECURITY BENEFITS

This is a federally mandated benefit for which both the employee and the Organization contribute. This program is intended to provide employees with retirement benefit payments and medical coverage once they are eligible to collect.

UNEMPLOYMENT INSURANCE

The Organization pays a state and federal tax to provide employees with unemployment insurance coverage. In the event that an employee becomes unemployed through no fault of their own or due to circumstances described by law, they may be able to collect benefits.

WORKPLACE GUIDELINES

SAFETY

The Organization is committed to providing a safe workplace. Accordingly, the Organization emphasizes "safety first." It is the employee's responsibility to take steps to promote safety in the workplace and work in a safe manner. By remaining safety conscious, employees can protect themselves and their coworkers. Employees are expected to promptly report all unsafe working conditions, accidents and injuries, regardless of how minor so that any potential hazards can be corrected.

SEVERE WEATHER POLICY & EMERGENCY PROCEDURES

The FDDC remains open in all but the most extreme circumstances. Unless an emergency closing is announced, all employees are expected to report to work. However, all employees are urged to use their own discretion in deciding whether they can commute safely to work. When an emergency closing has not been declared, employees who do not report to work because of inclement weather have the option of taking PTO or leave without pay.

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DESIGNATION OF EMERGENCY CLOSING

Normally authorization is needed from the Executive Director to cease operations. If severe weather conditions develop during working hours or something else of an emergency nature occurs, managers can allow their nonessential employees to leave work early and/or decree that the worksite must be evacuated for safety reasons. Generally, if schools in Leon County are closed due to severe weather conditions, the FDDC office will be closed as well.

EMERGENCY OPERATIONS TEAM

An Emergency Operations Team—consisting of the Executive Director, Chief Financial Officer and [Director, Contracts & Operations](#) ~~Human Resources Manager~~—is responsible for monitoring weather and emergency conditions for the purposes of communicating and implementing emergency plans.

PROCEDURES DURING CLOSINGS

If weather or other emergency conditions prevent employees from reporting to work on time, they are responsible for notifying their manager, within the first hour of the workday. If possible, such notification should be made by a telephone conversation directly with the manager. If direct contact is not possible, leaving a detailed voice mail message or message with another employee is acceptable. Employees should leave a phone number where they can be reached.

ESSENTIAL PERSONNEL

If the FDDC officially is closed, essential functions must be maintained, and essential personnel must report to work unless otherwise instructed. A roster of essential personnel is maintained by Human Resources. An up-to-date roster is kept on file in the Human Resources Department.

TEMPORARY TELECOMMUTING POLICY

In the event of an emergency such as a weather disaster or a pandemic, the FDDC may allow or require employees to temporarily work from home to ensure business continuity.

PROCEDURES

Employees allowed or required to work remotely will be advised by the Executive Director. Preparations should be made by employees and managers well in advance to allow remote work in emergency circumstances. This includes appropriate equipment needs, such as hardware and software.

The ~~Manager of Human Resources and Information Systems~~[Director, Contracts & Operations](#), along with our FDDC's outside IT firm, is available to review these equipment needs with employees and to provide support to employees in advance of emergency telework situations.

For voluntary telework arrangements, either the employee or their direct supervisor, with approval of the Executive Director, can initiate a temporary telecommuting agreement during emergency circumstances. The employee and manager will discuss the job responsibilities and determine if the job is appropriate for a telecommuting arrangement, including equipment needs, workspace design considerations and scheduling issues.

A telecommuting agreement will be prepared by human resources and signed by the employee, their direct supervisor and the Executive Director.

The employee will establish an appropriate work environment within their home for work purposes. FDDC will not be responsible for costs associated with the setup of the employee's home office, such as

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remodeling, furniture or lighting, nor for repairs or modifications to the home office space or internet access.

FDDC will determine the equipment needs for each employee on a case-by-case basis. Equipment supplied by the organization is to be used for business purposes only.

Consistent with FDDC's requirements for information security for employees working at the office, telecommuting employees will be expected to ensure the protection of proprietary company and customer information accessible from their home office.

Employees should not assume any specified period for emergency telework arrangements, and FDDC may require employees to return to regular, in-office work at any time. This will be evaluated on a case-by-case basis with the Executive Director.

TELECOMMUTING POLICY

PROCEDURES

A telecommuter works from a home office on a regular basis of one or more days each week and enters a formal arrangement to do so. This case will be arranged with the supervisor.

PARTICIPATION

Participation in telecommuting will be voluntary and must be mutually agreed upon by the employee and the supervisor. The approving authority may cancel the agreement at any time when it is determined that continuation would not be productive, efficient, or otherwise not in the best interest of the Florida Developmental Disabilities Council, Inc.

Telecommuting is not a replacement for childcare or elder care. It isn't as simple as staying at home and working. It requires careful planning and discipline with the needs of the workplace taking priority over personal needs.

COMPENSATION

Telecommuters will be compensated for all pay, leave, overtime, and travel as if duties were being performed at the official work location. Employee records of hours worked shall be required as it is with all, hourly employees. Overtime shall not be worked unless authorized in advance by the supervisor. Telecommuters are subject to the same rules and procedures as other employees and are covered by worker's compensation when performing official work duties at the alternate work site. Telecommuting will not adversely affect an employee's eligibility for advancement or any other employee right or benefit.

EQUIPMENT

FDDC may provide all or part of the equipment necessary for accomplishing work assignments, including the installation and maintenance of FDDC owned equipment at the home office. The telecommuting employee must apply approved safeguards to protect FDDC equipment and supplies. All official state records, files and documents must be protected from unauthorized disclosure or damage and returned safely to the FDDC premises. The supervisor and employee must agree upon the equipment and equipment expenses to be used in telecommuting.

TELECOMMUTING AGREEMENT

FDDC may require that an official telecommuting agreement be signed by the telecommuter and approved by the telecommuter's immediate supervisor, and other required approval authority prior to

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beginning a telecommuting arrangement. A Telecommuting Work Plan should be included as part of the Telecommuting Agreement. The Work Plan should include at a minimum:

- Specific description of the duties to be performed
- Established workdays and normal work hours
- Explanation as to how supervision will be provided
- Explanation as to how work products and outputs will be monitored and reviewed
- Explanation as to how attendance and leave records will be maintained and processed

VISITORS IN THE WORKPLACE

To provide for the safety and security of employees and the facilities at FDDC, only authorized visitors are allowed in the workplace. Restricting unauthorized visitors helps maintain safety standards, protects against theft, ensures security of equipment, protects confidential information, safeguards employee welfare, and avoids potential distractions and disturbances.

All visitors should enter FDDC at the main entrance. Authorized visitors will receive directions or be escorted to their destination.

If an unauthorized individual is observed on FDDC's premises, employees should immediately notify their manager or, if necessary, direct the individual to the main entrance.

USE OF EQUIPMENT AND MATERIALS

Organization equipment and materials are provided for the use of employees in carrying out their duties. Neither are to be utilized for personal purposes. Equipment and supplies make up a significant amount in the FDDC budget.

Equipment is often expensive and may be difficult to replace. When using Organization equipment, employees are expected to exercise care, perform required maintenance, and follow all operating instructions, safety standards, and guidelines.

If an employee notices any equipment, machines, or tools appearing to be damaged, defective, or in need of repair, they must notify their manager immediately. Prompt reporting of damages, defects, and the need for repairs could prevent deterioration of equipment and possible injury to employees or others. The improper, careless, negligent, destructive, or unsafe use or operation of equipment can result in disciplinary action, up to and including termination of employment.

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**AT-WILL EMPLOYMENT AGREEMENT AND
ACKNOWLEDGEMENT OF RECEIPT OF EMPLOYEE HANDBOOK**

I acknowledge that I have been provided with a copy of the Florida Developmental Disabilities Council, Inc. (the "Organization") Employee Handbook, which contains important information on the Organization's policies, procedures and benefits. I understand that I am responsible for familiarizing myself with the policies in this Handbook and obtain answers to any questions that I may have, and hereby agree to comply with all rules applicable to me.

I understand and agree that the policies described in the Handbook are intended as a guide only and do not constitute a contract of employment. I specifically understand and agree that the employment relationship between the Organization and me is at-will and can be terminated by the Organization or me at any time, with or without cause or notice. Furthermore, the Organization has the right to modify or alter my position, or to impose any discipline it deems appropriate at any time. Nothing in this handbook is intended to modify the Organization's policy of at-will employment. The at-will employment relationship may not be modified except by a specific written agreement signed by me and the Executive Director of the Organization. This is the entire agreement between the Organization and me regarding this subject. All prior or contemporaneous inconsistent agreements are superseded.

I understand that the Organization reserves the right to make changes to its policies, procedures or benefits at any time at its discretion. However, the at-will employment agreement can be modified only in the manner specified above. I further understand that the Organization reserves the right to interpret its policies or to vary its procedures as it deems necessary or appropriate.

I have received the Organization Employee Handbook. I have read (or will read) and agree to abide by the policies and procedures contained in the Handbook—including those contained in the Appendix of this Handbook.

Signature: _____ Date: _____

Printed Name: _____

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FLORIDA MINI-COBRA NOTIFICATION

The state of Florida offers an extended COBRA insurance plan for employees at companies with between 2-19 employees.

Eligibility: In order to be eligible for Florida Mini Cobra insurance coverage, you must have been covered by the employer group health insurance plan when you lost your employment and must not qualify for ⁹federal COBRA insurance. As with federal COBRA laws, your beneficiaries are also eligible for COBRA insurance in Florida. You are not eligible for Florida Mini COBRA insurance if you are eligible for Medicare, or if you qualify for another group health insurance plan.

Signing Up: To sign up for Florida Mini COBRA insurance coverage, you must send written notification to your insurance company or HMO within 30 days of employment loss. Florida Mini COBRA insurance, unlike federal COBRA insurance, is handled individually by the health insurance provider. Therefore each insurer may have slightly different forms and specific sign-up requirements. You can always contact the health insurance provider for support in completing these forms.

Length of Coverage: Florida Mini COBRA insurance lasts up to 8 months, although you may qualify for an additional 11 months if you are completely disabled.

Termination: Florida Mini COBRA insurance can be terminated for a variety of reasons. The most common reasons for termination of Florida Mini COBRA insurance coverage is failure to pay premiums, termination of the group health insurance plan by the employer, or eligibility for another group insurance plan.

Cost: Florida Mini COBRA insurance costs are based on the insurance premium cost under the group insurance plan you participated in as an employee. Depending on your employer, they may have paid the entire premium or part of the premium. Under Florida Mini COBRA insurance benefits, you will be responsible for paying 115% of the premium. Although this may seem high, it is still significantly less than you would pay for similar health insurance coverage if you bought individual health insurance. If you qualify for the 11-month extension due to disability, your cost will raise to 150% of the premium during those 11 months.

For help signing up for Florida Mini COBRA insurance, you may consider contacting the following state agencies.

Florida Office of Insurance Regulation

200 East Gaines Street
Tallahassee, FL 32399
Phone: 850.413.3140
<http://www.flor.com/director/>

U.S. Department of Labor Employee Benefits Security Administration

Miami District Office (South Florida)
8040 Peters Road, Bldg. H, Suite 104
Plantation, FL 33324
Phone: 954.424.4022
Fax: 954.424.0548
<http://www.dol.gov/ebsa/>

⁹ Federal COBRA is only offered with companies/organizations employing 20 or more individuals.
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EEO/ANTI-HARASSMENT POLICY

Reporting/Complaint procedure

The FDDC encourages reporting of all perceived incidents of discrimination, harassment or retaliation, regardless of the offender's identity or position. Individuals who believe that they have witnessed or been the victim of such conduct should report their concerns to their immediate manager, the Associate Director, or the designated Human Resources representative.

An employee who believes that they have been subjected to sexual harassment by anyone is encouraged, but not required, to promptly tell the person that the conduct is unwelcome and ask the person to immediately stop the conduct. A person who receives a request to cease unwelcome conduct must comply and must not retaliate against the requesting employee. The Company encourages, but does not require, individuals to take this step before utilizing the below Reporting/Complaint Procedure.

FDDC has established the following procedure for lodging a complaint of harassment, discrimination or retaliation. The company will treat all aspects of the procedure confidentially to the extent reasonably possible.

1. Complaints should be submitted as soon as possible after an incident has occurred, preferably in writing. The HR representative may assist the complainant in completing a written statement or, in the event an employee refuses to provide information in writing, the HR representative will dictate the verbal complaint.
2. Upon receiving a complaint or being advised by a supervisor or manager that violation of this policy may be occurring, the HR representative will notify senior management and review the complaint with the company's legal counsel and the Chair of the Council.
3. The HR representative will initiate an investigation to determine whether there is a reasonable basis that the alleged violation of this policy occurred.
4. If necessary, the complainant and the respondent will be separated during the course of the investigation, either through internal transfer or administrative leave.
5. During the investigation, the HR representative, together with legal counsel or other management employees, will interview the complainant, the respondent and any witnesses to determine whether the alleged conduct occurred.
6. Upon conclusion of an investigation, the HR representative conducting the investigation will submit a written report of their findings to the company. If it is determined that a violation of this policy has occurred, the HR representative will recommend appropriate disciplinary action, up to and including termination of employment. The appropriate action will depend on the following factors:
 - a) the severity, frequency and pervasiveness of the conduct;
 - b) prior complaints made by the complainant;

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- c) prior complaints made against the respondent; and
 - d) the quality of the evidence (e.g., firsthand knowledge, credible corroboration).
7. Appropriate action will also be taken to deter any future harassment.
 8. If the investigation is inconclusive or if it is determined that there has been no violation of policy but potentially problematic conduct may have occurred, the HR representative will recommend appropriate preventive action.
 9. Once a final decision is made, the HR representative will meet with the complainant and the respondent separately and notify them of the findings of the investigation. If disciplinary action is to be taken, the respondent will be informed of the nature of the discipline and how it will be executed.

False and malicious complaints of harassment, discrimination, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action.

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WORKERS COMPENSATION PROCESS

If an employee incurs a work-related injury or illness, s/he must report it to their manager and to Human Resources immediately. Failure to do so may result in benefits being denied. A "Job-Related Accident Report" form may be obtained from the intranet system or from Human Resources and must be completed.

The key to this--and any other time off work situation--is good communication. The employee is obligated to keep the Organization promptly informed after each medical visit concerning their medical diagnosis, prognosis, potential return to work, possible work restrictions, etc.

Health care benefits will continue if the employee was enrolled in these benefits prior to the leave. The Organization will continue to pay its portion of the employee's monthly health insurance premiums while s/he is on a Workers Compensation leave, as long as the employee pays their portion to the Organization no later than the date on which the Organization normally submits these payments to the insurance carrier. Coverage can be terminated for non-payment of premiums after a 30-day grace period. Failure on the employee's part to make these payments will result in cancellation of their health insurance coverage.

As with any injury/illness related absence, the employee must return to work as soon as the condition for which the absence was granted is remedied and the employee receives a physician's statement that he or she is fit to return to or recommence work. If the attending physician recommends restrictions, that information must be shared immediately with the Organization, as well, so that if accommodation is possible, it can be devised and offered.

If the employee fails to immediately report back to work once determined able to do so by the attending physician, s/he will be considered to have abandoned their job and employment will be terminated.

With some exceptions (e.g., restrictions that cannot be accommodated, term of disability requiring replacement of worker), when an employee is able to return to work, s/he will be reinstated to the position held when the leave started, or to an equivalent position with equivalent benefits and pay, and other terms and conditions of employment.

While benefits such as paid time off work do not accrue during a leave of absence, such benefits that have already accrued prior to the leave are protected (e.g., paid time off work).

An employee who does not return to work at the end of the leave period is responsible for repaying the Organization for any health premiums paid on their behalf, unless the employee does not return from the leave because of an authenticated work-related health condition prohibiting him/her from doing so.

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DRUG AND ALCOHOL ABUSE POLICY

In compliance with the Drug-Free Workplace Act of 1988, the FDDC has a longstanding commitment to provide a safe, quality-oriented and productive work environment. Alcohol and drug abuse poses a threat to the health and safety of the FDDC employees and to the security of the Organization's equipment and facilities. For these reasons, the FDDC is committed to the elimination of drug and alcohol use and abuse in the workplace.

The Drug and Alcohol Abuse Policy applies to all employees and all applicants for employment of the FDDC. The [Director, Contracts & Operations](#)~~Manager of Human Resources~~ is responsible for policy administration.

EMPLOYEE ASSISTANCE

The FDDC will assist and support employees who voluntarily seek help for drug or alcohol problems before becoming subject to discipline or termination under this or other the FDDC policies. Such employees will be allowed to use accrued paid time off, may be placed on leaves of absence, referred to treatment providers, and/or otherwise reasonably accommodated. Employees may be required to document that they are successfully following prescribed treatment plans and to take and pass follow-up tests. If an employee fails a follow-up test, the employee will have forfeited the opportunity to be granted a leave of absence for treatment, and will face possible discipline, up to and including discharge.

PRESCRIBED MEDICATION

This policy does not prohibit employees from the lawful use and possession of prescribed medications—including medical marijuana. However, employees must consult with their doctors about the medications' effect on their fitness for duty and ability to work safely, and they must promptly disclose any work restrictions to their managers. Failure to do so may result in discipline up to and including termination of employment.

SUBSTANCE ABUSE WORK RULES

Whenever employees are working, are operating any of the FDDC equipment, driving on Organization business, are present on the FDDC premises or are conducting Organization-related work offsite, they are prohibited from:

- Using, possessing, buying, selling, manufacturing or dispensing an illegal drug (to include possession of drug paraphernalia).
- Being under the influence of alcohol or an illegal drug as defined in this policy.
- Possessing or consuming alcohol.

The presence of any detectable amount of any illegal drug, illegal controlled substance or alcohol in an employee's body system, while performing Organization business or while in an Organization facility, is prohibited.

The FDDC will also not allow employees to perform their duties while taking prescribed drugs that are adversely affecting their ability to safely and effectively perform their job duties. Employees taking a prescribed medication must carry it in a container labeled by a licensed pharmacist or be prepared to produce the container if asked.

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Any illegal drugs or drug paraphernalia will be turned over to an appropriate law enforcement agency and may result in criminal prosecution.

REQUIRED TESTING

REASONABLE SUSPICION

Employees are subject to testing based on (but not limited to) observations by at least two members of management of apparent workplace use, possession or impairment. The [Director, Contracts & Operations](#)~~Human Resources Manager~~ and/or the Executive Director should be consulted before sending an employee for testing. Management must use the Reasonable Suspicion Observation Checklist to document specific observations and behaviors that create a reasonable suspicion that an employee is under the influence of illegal drugs or alcohol. Examples include:

- Odors (smell of alcohol, body odor or urine).
- Movements (unsteady, fidgety, dizzy).
- Eyes (dilated, constricted or watery eyes, or involuntary eye movements).
- Face (flushed, sweating, confused or blank look).
- Speech (slurred, slow, distracted mid-thought, inability to verbalize thoughts).
- Emotions (argumentative, agitated, irritable, drowsy).
- Actions (yawning, twitching).
- Inactions (sleeping, unconscious, no reaction to questions).

When reasonable suspicion testing is warranted, both management and HR will meet with the employee to explain the observations and the requirement to undergo a drug and/or alcohol test within two hours. Refusal by an employee will be treated as a positive drug test result and will result in immediate termination of employment

Under no circumstances will the employee be allowed to drive himself or herself to the testing facility. A member of management must transport the employee or arrange for a cab or ride sharing service and arrange for the employee to be transported home.

POST-ACCIDENT

Employees are subject to testing when they cause or contribute to accidents that seriously damage FDDC equipment or property or that result in an injury to themselves or another employee requiring offsite medical attention. In these instances, the investigation and subsequent testing must take place within two hours following the accident, if not sooner. Refusal by an employee will be treated as a positive drug test result and will result in immediate termination of employment.

Under no circumstances will the employee be allowed to drive himself or herself to the testing facility. A member of management must transport the employee or arrange for a cab or ride share service and arrange for the employee to be transported home.

CONSEQUENCES

Applicants who refuse to cooperate in a drug test or who test positive will not be hired and will not be allowed to reapply/retest in the future.

Employees who refuse to cooperate in required tests or who use, possess, buy, sell, manufacture or dispense an illegal drug in violation of this policy will be terminated. If the employee refuses to be tested, yet the Organization believes he or she is impaired, under no circumstances will the employee be allowed to drive himself or herself home.

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Employees who test positive, or otherwise violate this policy, will be subject to discipline, up to and including termination. Depending on the circumstances, the employee's work history/record and any state law requirements, the FDDC may offer an employee who violates this policy or tests positive the opportunity to return to work on a last-chance basis pursuant to mutually agreeable terms, which could include follow-up drug testing at times and frequencies determined by the FDDC for a minimum of one year but not more than two years as well as a waiver of the right to contest any termination resulting from a subsequent positive test. If the employee either does not complete the rehabilitation program or tests positive after completing the rehabilitation program, the employee will be immediately discharged from employment.

Employees will be paid for time spent in alcohol or drug testing and then suspended pending the results of the drug or alcohol test. After the results of the test are received, a date and time will be scheduled to discuss the results of the test; this meeting will include a member of management and the [Director, Contracts & Operations](#)~~Human Resources Manager~~ and/or Executive Director. Should the results prove to be negative, the employee will receive back pay for the times/days of suspension.

INSPECTIONS

The FDDC reserves the right to inspect all portions of its premises for drugs, alcohol or other contraband. All employees, contract employees and visitors may be asked to cooperate in inspections of their persons, work areas, and property that might conceal a drug, alcohol or other contraband. Employees who possess such contraband or refuse to cooperate in such inspections are subject to appropriate discipline, up to and including discharge (for employees), cancellation of contracts (for contractors), or banning from future site visits (for vendors).

CRIMES INVOLVING DRUGS

The FDDC prohibits all employees, including employees performing work under government contracts, from manufacturing, distributing, dispensing, possessing or using an illegal drug in or on Organization premises or while conducting Organization business. FDDC employees are also prohibited from misusing legally prescribed or over the counter (OTC) drugs. Law enforcement personnel may be notified, as appropriate, when criminal activity is suspected.

The FDDC does not desire to intrude into the private lives of its employees but recognizes that employees' off-the-job involvement with drugs and alcohol may have an impact on the workplace. Therefore, the FDDC reserves the right to take appropriate disciplinary action for drug use, sale or distribution while off Organization premises. All employees who are convicted of, plead guilty to or are sentenced for a crime involving an illegal drug are required to report the conviction, plea or sentence to Human Resources within five days. Failure to comply will result in automatic discharge. Cooperation in complying may result in suspension without pay to allow management to review the nature of the charges and the employee's past record with the FDDC.

DEFINITIONS

"Organization premises" includes all buildings, offices, facilities, grounds, parking lots, lockers, places and vehicles owned, leased or managed by the FDDC or any site on which the Organization is conducting business.

"Illegal drug" means a substance whose use or possession is controlled by federal law but that is not being used or possessed under the supervision of a licensed health care professional (Controlled substances are listed in Schedules I-V of 21 C.F.R. Part 1308).

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"Refuse to cooperate" means to obstruct the collection or testing process; to submit an altered, adulterated or substitute sample; to fail to show up for a scheduled test; to refuse to complete the requested drug testing forms; or to fail to promptly provide specimen(s) for testing when directed to do so, without a valid medical basis for the failure. Employees who leave the scene of an accident without justifiable explanation prior to submission to drug and alcohol testing will also be considered to have refused to cooperate and will automatically be subject to discharge.

"Under the influence of alcohol" means an alcohol concentration equal to or greater than .04, or actions, appearance, speech or bodily odors that reasonably cause a manager to conclude that an employee is impaired because of alcohol use.

"Under the influence of drugs" means a confirmed positive test result for illegal drug use per this policy. In addition, it means the misuse of legal drugs (prescription and possibly OTC) when there is not a valid prescription from a physician for the lawful use of a drug in the course of medical treatment (containers must include the patient's name, the name of the substance, quantity/amount to be taken and the period of authorization).

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FAMILY AND MEDICAL LEAVE (FMLA) POLICY

ELIGIBILITY

Any employee who has worked for the Organization for at least 12 months and has at least 1,250 hours of service before requesting the leave is entitled to take a leave. An employee is not entitled to a leave under this policy during the first year of employment.

PURPOSE

- A. Eligible employees may be granted up to 12 weeks of unpaid FMLA leave during a 12-month period any of the following reasons:
 - a. The birth of an employee's child and to care for the newborn child
 - b. For placement with the employee of a child for adoption or foster care
 - c. To care for the employee's spouse, child, or parent with a serious health condition
 - d. For the serious health condition of the employee that makes the employee unable to perform the functions of their job

BIRTH, ADOPTION, OR PLACEMENT OF FOSTER CARE FOR EMPLOYEE'S CHILD

This leave must be taken within 12 months of the birth, adoption, or placement of foster care for the child. If both spouses work for the Organization, and the leave is for the birth, adoption, or acceptance for foster care of a child, or to care for a sick parent, then a combined total of 12 weeks (not two separate 12-week periods) is available.

SERIOUS HEALTH CONDITION OF EMPLOYEE, SPOUSE, CHILD, OR PARENT

If the leave is to care for a sick spouse, child, or parent with a serious health condition, or for the employee's own serious health condition which renders him/her unable to perform their job function, separate 12-week periods are available.

- B. Eligible employees may be granted up to 26 weeks of unpaid FMLA leave during a 12-month period for the following reason:
 - a. For care of a wounded U.S. armed forces service member who is the spouse, son, daughter, parent, or next of kin—defined as the nearest blood relative—of the eligible employee. If both spouses work for the Organization, they may use a total of no more than 26 weeks combined for this leave (not two separate 26-week periods).

A "rolling" 12-month period is measured backward from the date the employee uses any FMLA leave. To qualify for the full 12 or 26 weeks, an employee must not have taken any FMLA leave during the preceding 12-month period. For example, if an employee requests an FMLA leave under A. above on September 1, 2009, s/he would be entitled to the full 12 weeks only if s/he had not taken any FMLA leave time between the period of September 1, 2008 and August 31, 2009. If however, the employee had taken leave time during the prior 12-month period, this time would be offset from the full 12-week period. For example, if three weeks had been taken during the prior 12 months, the employee would only be entitled to 9 weeks of FMLA.

If a holiday occurs during the time that FMLA is taken, the employee does not get an extra FMLA day because of the holiday.

NOTICE BY THE EMPLOYEE TO THE ORGANIZATION

If the leave is foreseeable (e.g., the birth of a child), an employee is required to provide 30 days of notice of intent to take a leave. If the leave is unforeseeable (e.g., a medical emergency), absent unusual

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circumstances, an employee must follow the Organization's usual and customary call-in procedures for reporting an FMLA leave absence and as much notice as is possible and practical--preferably at least two business days--is sufficient. Failure to give proper notice of the need for family or medical leave may result in delay of the commencement of the leave.

If an FMLA leave is for a serious health condition of the employee or their spouse, child, or parent—or the instance of B above for the next of kin—an employee is required to provide medical certification, which includes, but is not limited to, the reason for and the probable duration of the leave. This certification must be provided in a timely manner. The Organization will request this medical certification when the employee gives notice of the leave, or within two business days thereafter.

NOTICE BY THE ORGANIZATION TO THE EMPLOYEE

Once the Organization is advised of the need for a FMLA leave, the employee will be provided with detailed information outlining the specific FMLA obligations. This information will be provided to the employee within two business days. If the leave has already begun, the notice will be mailed to the employee's home.

If the Organization knows that the leave qualifies under FMLA, but the employee has not designated the leave as such, the Organization will inform the employee in writing that the Organization is treating the days as FMLA leave. The leave will only count as FMLA leave from the point that the employee is informed of this. Absences before the employee is informed will not count toward their FMLA eligibility.

There are two exceptions to this rule. First, if the employee was absent for an FMLA reason and the Organization did not learn about the reason until the employee returned to work. In this instance, the Organization may promptly (i.e., within two business days of the employee's return to work) designate the leave retroactively, with appropriate notice to the employee.

Secondly, the employee may also request that the completed leave be considered FMLA-qualified after the fact, if he or she notifies the Organization within two business days after returning to work. In the absence of timely notice by the employee, he or she may not subsequently assert FMLA protection for the absence.

SUBSEQUENT FMLA LEAVES

In the event an employee is on one FMLA leave and qualifies for a second FMLA leave within a six-month period, the Organization will inform the employee of any changes that will take place within two business days. An example of this would be if the first leave had been a paid leave and the next was to be unpaid, the Organization would explain this in detail.

MEDICAL CERTIFICATION

For leaves related to a serious health condition of the employee, spouse, child, or parent, the Organization has the option to require an independent second medical opinion from a health care provider designated or approved by the Organization. The Organization's health care provider may also contact the employee's health care provider, with the employee's permission.

If the second opinion differs from that provided by the employee's physician, the Organization may require the opinion of a third health provider, designated or approved jointly by the Organization and the employee. The third opinion will be final and binding. The Organization will pay the cost for obtaining the second and third medical opinions. The time it takes to obtain these additional opinions

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will be treated as qualifying under FMLA. If the employee requests it, the Organization will provide copies of the opinions to the employee within two business days.

During the leave period, the employee may be required to submit additional information to substantiate the continuation of leave benefits. If the leave is for pregnancy, a chronic condition, or a permanent condition being treated by a health care provider, re-certification can be requested every 6 months.

- Employee must visit health care provider within 7 days after the first day of the FMLA-related incapacity
- A second visit is required within 30 days of the beginning of the FMLA-related incapacity
- Employee must then make at least 2 visits to a health care provider per year during an FMLA leave.

More frequent certifications may be required if: (1) circumstances change significantly, or (2) the Organization receives information that raises questions as to the validity of the most recent certification.

COORDINATION WITH OTHER LEAVE POLICIES

Under FMLA, the Organization may designate FMLA leave and disability leave (e.g., catastrophic leave, short-term or long-term disability) as **running concurrently for both the benefits plan and the FMLA leave entitlement**. If the requirements to qualify for a disability plan are more stringent than those of FMLA, the employee must meet the more stringent requirements or may elect to use the unpaid FMLA leave.

Any paid leave that the Organization already provides for a reason covered under the FMLA will be deducted from the unpaid FMLA available. The employee is required to use paid vacation, personal, and sick leave as part of the 12-week or 26-week Family Leave period (i.e., accrued vacation, personal, and sick leave is applied at the beginning of an FMLA leave and runs concurrent with FMLA time off work until accrued vacation, personal, and sick leave is exhausted).

BENEFITS WHILE ON LEAVE

Health care benefits will continue if the employee was eligible for the benefits prior to the leave. The employee must continue to pay any appropriate premiums for these benefits. He or she will have the choice of either paying the premiums on a pre-tax basis through payroll deduction in advance of the leave, or, paying the premiums on an after-tax basis by any reasonable arrangement agreed to by the employee and the Organization.

Coverage can be terminated for non-payment of premiums, but only after a 30-day grace period. The Organization will send out a notice 15 days before the grace period ends stating that coverage will be terminated unless the employee pays the premium.

Benefits that have already accrued prior to the leave are protected. An employee on leave will continue to accrue seniority or employment benefits (e.g., Paid Time Off accrual) in accordance with the Organization policy.

An employee who does not return to work at the end of the leave period is responsible for repaying the Organization for any health premiums paid on their behalf, unless the employee does not return from the leave because of a serious health condition or to continue to care for a sick child, parent or spouse, or he or she does not return due to circumstances beyond their control.

If the employee does not return to work at the end of leave period, he or she will be offered the opportunity to continue health benefits as provided by COBRA. The COBRA period begins on the day the

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employee was scheduled to return to work, or on the day the Organization is notified that the employee is not going to return to work (whichever comes first).

If the employee cannot return to work and the leave had been taken for a serious health condition or to care for a sick child or spouse, then a physician's certificate must be provided to support the employee's claim. This certification must state that the employee's health condition prevents him/her from returning, or that he or she is needed to care for the sick child, spouse, or parent. If the employee fails to furnish this certificate within 30 days of the Organization's request, the Organization may recover the health insurance premiums it paid during the period of leave.

RETURNING TO WORK

An employee must return to work as soon as the condition for which the FMLA leave was granted is no longer applicable, or at the end of the authorized FMLA leave period, whichever comes first. If the FMLA leave was for their own serious health condition, the employee is required to provide a physician's statement that he or she is fit to return to work. This applies whether the FMLA leave was taken at one time or on an intermittent basis.

If all is in good order, the employee will be entitled to full reinstatement of all health and welfare benefits. In the event that coverage had been canceled due to nonpayment of premiums, the employee will be reinstated without penalties (e.g., pre-existing condition exclusion, waiting period, evidence of insurability).

If the employee fails to immediately report back to work, s/he may be considered to have abandoned their job and employment will be terminated.

With some exceptions noted below, when an employee returns to work from an FMLA leave, s/he will be reinstated to the position held when the leave started, or to an equivalent position with equivalent benefits and pay, and other terms and conditions of employment.

- Reasonable job safety must be maintained.
- Employees must be able to perform the "essential functions" of their jobs safely.

The Organization cannot guarantee reinstatement to the top 10% of highly compensated employees or to those whose reinstatement would create substantial economic hardship for the Organization. The employee will be notified in writing at the time the FMLA leave is requested that he or she is a key employee and/or that the Organization cannot guarantee job reinstatement.

INTERMITTENT OR REDUCED LEAVE SCHEDULE

An employee may take an intermittent leave (e.g., one day per week) or a reduced hours schedule because of a serious health condition. In the case of an employee's pregnancy, the employee may take intermittent leave for pre-natal examinations or pregnancy-related illnesses, even if she is not incapacitated for three consecutive days or seeks other medical care. However, it is the employee's obligation to schedule appointments and/or treatments without disrupting the Organization's operations.

If an employee takes an FMLA leave because of the birth of a child or the placement of an adopted or foster child, the Organization is not required to extend an intermittent leave, or to provide a reduced hours schedule, but may approve it if the circumstances permit (e.g., if operations will not be disrupted by this employee's absence).

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An employee may also take an intermittent leave or a reduced hours schedule to care for a family member with a serious health condition.

For every hour the employee takes on a reduced leave schedule, an hour will be subtracted from the total number of hours available under the FMLA leave policy. An employee who requests intermittent leave or a reduced hours work schedule may be required to temporarily transfer to an alternative position for which the employee is qualified. This alternative position will provide equivalent pay and benefits and will be more flexible concerning recurring periods of leave than the regular position.

FMLA/ADA/WORKERS COMPENSATION INTERACTION

There are many situations in which FMLA, ADA (Americans with Disabilities Act), and Workers Compensation policies might overlap and/or be in conflict. For example, before transferring an employee to an alternative position, the possible impact of both ADA and Workers Compensation regulations will need to be assessed. While FMLA permits a temporary transfer to an alternative position, the ADA allows it only if the employee cannot perform their present position or reasonable accommodation of that position is not possible.

Another example of the potential overlap between these policies is that a leave under FMLA does not guarantee job reinstatement to key employees; however, under ADA the leave could be considered as a reasonable accommodation.

ADMINISTRATION OF THE POLICY

The Organization will administer this policy in a uniform, nondiscriminatory fashion in accordance with all other applicable federal, state, and local laws including, but not limited to, the Americans with Disabilities Act.

GLOSSARY FOR FMLA

Child: A biological, adopted, or foster child, stepchild, legal ward, or a child of an employee for which that employee has daily responsibility to care for and financially support a child who is under age 18.

Children age 18 and over are included if they are totally disabled, unmarried and incapable of self-support by reason of mental or physical disability.

Parent: A biological parent of an employee or a person who had daily responsibility to care for, and financially support, an employee when they were a child.

Spouse: As defined under the State in which the employee resides. It includes common-law marriages where recognized by the State. It does not include unmarried domestic partners of the same gender.

Serious Health Condition: Defined as an injury, impairment, or physical or mental condition that involves either:

- A) In-patient care in a hospital, hospice, or residential care facility, or,
- B) Continuing treatment by a health care provider such as:
 - 1) A period of incapacity of more than three consecutive calendar days involving treatment by a health care provider.

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- 2) Pregnancy and related care (even if an employee does not receive treatment, and the care does not last three days).
 - 3) A chronic serious health condition that requires periodic visits to a health care provider, continues over a period of time, and may cause episodic, rather than continuing, incapacity (i.e., asthma, diabetes, epilepsy).
 - 4) A permanent, or long- term condition for which treatment may not be effective (i.e., Alzheimer's, stroke).
 - 5) An absence to receive multiple treatments by a health care provider for a non-chronic condition (i.e. care following surgery), or, for a condition that would likely result in an incapacity of three or more days in the absence of medical treatment (i.e., cancer, severe arthritis).
- C) Substance abuse in order to undergo treatment by a health care provider, and stress if it rises to the level of a mental illness.
- D) A medical condition where the health care provider finds that the employee is unable to work at all or is unable to perform any of the essential functions of their position as defined under the Americans with Disabilities Act.

Health Care Provider: A doctor of medicine, or osteopathy, who is authorized to practice medicine or surgery by the State in which the doctor practices; nurse practitioners; and nurse-midwives who provide diagnosis and treatment of certain conditions, especially at Health Maintenance Organizations and in rural areas where other health care providers may not be available, if they are performing within the scope of their practice as allowed by State law; and Christian Science practitioners.

Also included are clinical social workers, and health care providers from whom the employer's group health plan will accept certification. Physician's assistants are not acceptable unless under the supervision of another health care provider.

FMLA - MILITARY CAREGIVER LEAVE

Family members of wounded military personnel may take up to 6 months (26 weeks) of unpaid leave in a single 12-month period to provide care – per service member, per injury. Existing **FMLA** notice rules apply, including working with the employer on scheduling to minimize work operations disruption.

Qualifying family members of servicemember include the spouse, child, parent (but not in-laws), next of kin and blood relatives in order of priority. The service member may make a written designation of a specific blood relative as next of kin, and that will control. The Organization may require reasonable documentation of family relationships.

Qualifying servicemember includes regular armed forces, reserves, National Guard, or any of above on a temporary disability retired list (TDRL).

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Qualifying servicemember must have a serious illness or injury incurred in the line of duty on active duty; be rendered medically unfit to their duties (of their office, grade, rank, or rating and for which they are undergoing medical treatment, recuperation, or receiving therapy or outpatient treatment or is on TDRL.

The Organization requires certification of the need for caregiver leave from specific military health care providers. The Department of Labor offers an optional form, WH-385, for certifying military caregiver leave. The Organization will also accept “invitational travel orders” (ITOs) or “invitational travel authorizations” (ITAs) issued by the Department of Defense to family members for medical purposes as sufficient certification of the need for military caregiver leave. The Organization may require authentication and clarification of military caregiver certifications, as well.

The “FMLA year” for military caregiver purposes, begins with the first date of caregiver leave and ends 12 months later. The 26 weeks of caregiver leave may be taken in a single block or intermittently. The 26-week entitlement may not be carried over from year to year.

FMLA - EXIGENCY LEAVE

Families of **National Guard** members and Armed Forces **Reserves** members may take up to 12 weeks unpaid leave to manage members’ affairs while they are on active duty. Family members include child—regardless of age—who is biological, adopted, foster, step, legal ward; or if employee stood in loco parentis.

Qualifying exigency leave must fit into the following categories:

- When the servicemember has received a week or less in notice of deployment;
- For military events and related activities;
- For urgent (as opposed to recurring and routine) child-care and school activities;
- For financial and legal tasks to deal with a family member’s active duty;
- For counseling for the employee or child who isn’t already covered by FMLA;
- To spend time with the covered servicemember on rest and recuperation breaks during deployment;
- For post-deployment activities; and
- For other purposes arising out of the call to duty, as agreed upon by the employee and employer.

Employees seeking qualifying exigency leave must give reasonable and practical notice if the exigency is foreseeable. The notice must inform the employer that a family member is on active duty or called to active-duty status, cite a listed reason for leave, and give the anticipated length of absence.

CERTIFYING QUALIFIED EXIGENCY LEAVE

The Organization requires certification for qualified exigency leave (e.g., copy of the servicemember’s active-duty orders, Department of Labor form WH-385; Invitational Travel Orders (ITAs) issued by the Department of Defense). Authentication of documents submitted may be required as well as verification that the employee is acting on behalf of the service member with third parties.

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Pregnant Workers Fairness Act – 6/27/23

The federal **Pregnant Workers Fairness Act** (PWFA or the Act) took effect as of June 27, 2023. The Act requires “covered employers” to provide “reasonable accommodations” to a worker’s known limitations related to pregnancy, childbirth, or related medical conditions, unless the accommodation will cause the employer an “undue hardship.” Charges submitted by employees/applicants to the Equal Employment Opportunity Commission must be based on events that occurred on or after June 27, 2023.

The PWFA defines “covered entity,” “employee,” and “person” consistent with the definitions of those terms under Title VII of the Civil Rights Act of 1964. Likewise, the terms “reasonable accommodation” and “undue hardship” are to be “construed as such terms are construed under [the Americans with Disabilities Act (ADA)].” However, employers should be aware that the definition of “known limitation” explicitly goes beyond the ADA, stating: “The term ‘known limitation’ means physical or mental condition related to, affected by, or arising out of pregnancy, childbirth, or related medical conditions that the employee or employee’s representative has communicated to the employer whether or not such condition meets the definition of disability specified in section 3 of the Americans with Disabilities Act...”

Quick Points for Compliance

Who is a “covered employer”? The PWFA applies to private and public sector employers with at least 15 employees, including Congress, federal agencies, employment agencies, and labor organizations.

What are “reasonable accommodations”? Employers are required to provide reasonable accommodations for known limitations related to pregnancy, childbirth, or related medical conditions. The PWFA directs the EEOC to issue regulations within one year of the date the law is enacted that provide examples of reasonable accommodations that address known limitations related to pregnancy, childbirth, and related medical conditions. Examples of reasonable accommodations under the PWFA include:

1. Ability to sit or drink water;
2. Access to closer parking;
3. Flexible hours;
4. Appropriately sized uniforms and safety apparel;
5. Additional break time to use the bathroom, eat, and rest;
6. Ability to take leave or time off to recover from childbirth; and
7. Exemption from strenuous activities and/or activities that involve exposure to compounds not safe for pregnancy.

Under what circumstances does a pregnant employee qualify to receive “reasonable accommodations”? Pregnant employees will be qualified for “reasonable accommodations” if “any inability to perform essential functions is for a temporary period; the essential function could be performed in the near future; and the inability to perform the essential function can be reasonably accommodated.”

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Does PWFA replace or preempt federal, state, or local laws that provide more protection to workers affected by pregnancy, childbirth, or related medical conditions? All other federal, state, and local laws remain in place, so employees may still pursue rights under Title VII, the ADA, Family and Medical Leave Act, or other state and local laws. The PWFA seeks to fill the gap between Title VII and the ADA, and it goes further than the Pregnancy Discrimination Act of 1978 (PDA). Employers may be in violation of the PDA if they refuse to grant a reasonable accommodation to a pregnant worker when the same accommodation would have been granted to some other disabled employee.

What employer conduct is prohibited?

- Requiring covered employees to “accept an accommodation other than any reasonable accommodation arrived at through the interactive process”;
- Denying “employment opportunities” to covered employees “based on the need” to “make reasonable accommodations”;
- Requiring covered employees “to take leave, whether paid or unpaid, if another reasonable accommodation can be provided”; and
- Taking “adverse action in terms, conditions, or privileges or employment against” covered employees for requesting reasonable accommodations.

Are there defenses available to employers? The PWFA provides a defense for employers that work with employees in good faith to identify alternative accommodations that are equally effective to the accommodation requested by the employee, and do not cause an undue hardship. An “undue hardship” exists where the accommodation would involve significant difficulty or expense for the employer.

What damages can employees seek? Aggrieved private-sector employees are afforded the same relief provided under Title VII, including reinstatement, back pay, front pay, compensatory damages, punitive damages, and the right to recover reasonable attorneys’ fees and costs.

Adopted 5/15/2020
Revised 10/23/2023
[Revised 04/01/2025](#)

Formatted: Justified



Compensation / Benefits Market Study

Compensation Resources completed a thorough compensation and benefits study and met with the FDDC team to go over the results. Note that these results are a baseline for further examination and consideration by FDDC.

Based on Compensation Resources reports, we are recommending the following.

BENEFITS

Holidays: Add President's Day and one more Floating Holiday (increase from 11 to 13 paid holidays)

Jury Duty: Increase from 1 paid work week to unlimited paid jury or witness duty leave.

Bereavement: Increase from 3 to 4 paid days for bereavement leave.

Military Leave: Change eligibility to all active employees vs full-time with 1 full year of service.

Medical: Benefit options are being reviewed. Additional information and a recommendation will be provided in advance of the budget preparation period.

Open PTO: An unlimited PTO program with no accrual and no maximum. Below are the benefits for employees and employer.

| Employees | Employer |
|---|--|
| <ul style="list-style-type: none"> • Time off without worrying about hitting a fixed limit. • Work-life balance. • Sends signal of trust that employees can manage their own time and workload • Encourages ownership and responsibility. • No "use it or lose it" pressure. • Improves job satisfaction. | <ul style="list-style-type: none"> • A standout benefit to attract and retain employees. • No need to track accrual, carryover, or payouts. • Cost savings due to no payouts upon separation. • Don't have to carry the accrual liability on the financial statements. • Reduces administrative burden. |

What benefits are being considered?

(1) Qualified Small Employer Health Reimbursement Arrangement (QSEHRA)

To support our goal of attracting and retaining employees across the State of Florida, we are exploring the implementation of a **QSEHRA**. This benefit would provide all employees with a fixed

reimbursement amount to help cover the cost of individually purchased health insurance. A third-party administrator would assist employees with the process and ensure compliance with applicable regulations. The recommended platform for this service would be appx \$2,880 per year.

(2) Flexible Spending Account (FSA)

This benefit would allow employees to contribute pre-tax dollars to an FSA that can then be used for various healthcare costs. The recommended platform for this service would be appx \$900/year.

What benefits are *not* being considered?

The below additional benefits *are not* being recommended from the report at this time.

- Vision coverage
- Health Savings Account (not applicable)
- Sick Days (PTO is available)
- Maternity/Paternity/Family Leave (PTO is available)
- Commuter Benefits
- Health & Wellness Benefits
- Cell Phone Allowance/Work Cell Phone
- Pet Insurance
- Misc Perks

Note:

- FDDC *does* have an **Employee Assistance Program (EAP)** through Guardian that is available to employees.
- FDDC *does* have a **recognition program** that was recently established.

COMPENSATION

(1) All employees currently fall within market range

A salary that falls between the 25th and 75th percentile of the market range is considered “within market range.” Based on the analysis, 75% (6) of FDDC employees are within market range, with 25% (2) above market range (above the 75th percentile). No employees fall below the 25th percentile.

(2) Scaled Pay Grade Structure

Compensation Resources did provide a scaled grading structure – 10 pay grades (13-22) instead of 22 pay grades (1-22). They also recommended a change to the pay range for each of the 10 pay grades to equalize the range spread (min to max) and to scale the midpoints between each range to be consistent.

(3) Position Grades

Compensation Resources then re-graded each position which resulted in the grade for several positions being increased significantly.

(4) Recommendation

We do not recommend adopting the scaled grading structure or changing the position pay grades at this time. As a result, we also do not recommend any salary adjustments at this time. HR Solutions, along with the Executive Director and Finance team, will work on a scaled pay grade structure that accounts for some of Compensation Resources’ grade structure recommendations while ensuring a logical, progressive flow of range spreads. This will be presented for review before 2026.



2025 Compensation Study Methodology Report

March 19, 2025



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**2025 Compensation Study
Methodology Report**

Introduction and Purpose

EA Compensation Resources LLC (hereinafter "CR") was engaged by Florida Developmental Disabilities Council, Inc. (hereinafter also referred to as "FDDC" or the "Organization") to conduct a competitive market study of eight (8) positions in order to evaluate base salaries against the current competitive marketplace and assess the current salary structure based on the evaluation of the marketplace.

The analysis contained herein presents CR's findings with regard to the competitive levels of compensation within the marketplace, as a baseline for further examination by FDDC.

The information contained herein is provided for informational purposes and is not intended to provide legal, accounting, tax or investment advice and/or services.

Methodology

CR's market analysis of competitive compensation levels undertakes a systematic and consistent methodology that looks at a number of factors in order to provide the most applicable data for the job being evaluated. These factors include, but are not limited to, job content, organizational revenue and profile, industry, and geographic region (where applicable). The following identifies the steps undertaken during the analysis.

Market Study

- CR collected various documents and materials from FDDC relevant to this study, including, but not limited to, current compensation of all incumbents, information pertaining to the duties and responsibilities of the included positions, and financial information on the Organization.
- CR held discussions with Valerie Breen, Executive Director and Danielle Towery, HR Consultant, in order to gain an understanding of FDDC, its culture and challenges, perceptions regarding current compensation, and specifics regarding the duties and responsibilities of the positions.
- CR reviewed the job descriptions provided in order to understand the duties, responsibilities, and complexity of each benchmark position, to be used as the baseline for extracting compensation data from the competitive marketplace. Consideration was also given to the educational background, work experience, and other job-related factors as it pertains to matching positions to comparable jobs during the market analysis.
- CR undertook the evaluation of competitive compensation by utilizing published survey information. Position matches were based on the comparability of the job criteria provided in the job descriptions (duties, responsibilities, and reporting relationships) to published job summaries in the salary surveys.
- FDDC's positions were matched in the published surveys as follows:

Table 1
Survey Position Matching

| Position Title | Published Survey Matches |
|--|--|
| Executive Director | Executive Director |
| Chief of Operations & Finance | Top Finance/Operations Executive (50% each) |
| 2 levels for comparison purposes | Finance/Operations Director (50% each) |
| Chief of Programs & Research | Top Programs Executive w/ 10% premium for admin duties |
| Senior Director, State Plan & Evaluation | Contracts Director w/ 10% premium for level |
| Director, Contracts & Operations | Contracts/Compliance Director |
| Director, Public Policy & Advocacy | Government Affairs Manager |
| Director of Programs | Program Director w/ 10% for admin. duties |
| Executive Administrator | Executive Assistant (3 years exp) |

2025 Compensation Study

Methodology Report

- In order to further increase the comparability of the survey data to FDDC's positions, data was selected based on meeting one or more of the following criteria, which are influencers of compensation:

Table 2
Market Pricing Criteria

| Criteria | Parameter |
|----------------------------|---|
| Not-For-Profit Survey Data | Not-For-Profit General Industry & Developmentally Disabled Services |
| For-Profit Survey Data | For-Profit General Industry |
| Geographic location | Tallahassee, FL |
| Revenue size | \$5M |

- CR conducted a comprehensive competitive market analysis of Base Salary utilizing the following surveys:

Table 3
Published Survey Listing

| Survey Title | Publisher | Year |
|---|------------------------------------|------|
| Wage Statistics Survey | BLS (Bureau of Labor Statistics) | 2023 |
| Compensation Data National Survey Suite | CompData Surveys | 2024 |
| Compensation Survey Report of Not-for-Profit Organizations | Compensation Resources | 2024 |
| Salary Assessor | Economic Research Institute (ERI) | 2025 |
| Management Compensation Report of Not-For-Profit Organization | PRM Consulting Firm | 2024 |
| CompAnalyst | Salary.com Subscription Service | 2025 |
| Not-For-Profit Compensation Survey | TCS (Total Compensation Solutions) | 2024 |
| Nonprofit Organizations Salary & Benefits Report | The Nonprofit Times | 2024 |

- Data specific to Tallahassee, FL was collected, where available. Where only national data was available, data was decreased by 10.1% to reflect the average geographic differential between the United States and Tallahassee, FL.¹

Market Consensus Calculations

- All published survey data was aged to a common date of July 1, 2025, by a 3.5% annual aging factor, which is the estimated merit increase percentage for 2025 based on similar organizations in the Southern United States.²

¹ Geographic Assessor; Economic Research Institute (2025).

² Salary Budget Survey, (WorldatWork) (2024-2025).

2025 Compensation Study

Methodology Report

- To determine the market value of Base Salary, CR calculated the Mean, Median, Trimmed Mean, and Market Consensus of all published survey data points. The definitions of these measures of central tendency are as follows:
 - **Mean:** Simple average of the published survey data array.
 - **Median:** The middle number of the published survey data array.
 - **Trimmed Mean:** Average that eliminates the high and low data elements among the published survey data array.
 - **Market Consensus (MC):** The average of the Mean, Median, and Trimmed Mean; represents our best estimate of the market value (consensus) for the position.
- To calculate the Overall Market Consensus for the positions, the Not-For-Profit and For-Profit published survey data were averaged with a weighting as shown in **the table**, below.

Table 4
Data Set Weightings

| Positions | Industry | Weighting |
|--|--|-----------|
| Executive Director; Chief of Programs & Research; Director of Programs; Director, Public Policy & Advocacy | Developmentally Disabled Centers & Services Not-For-Profit General Industry | 2x 1x |
| Chief of Operations & Finance; Director, Contracts & Operations; Executive Administrator; Senior Director, State Plan & Evaluation | Developmentally Disabled Services/Not-For-Profit Services For-Profit General Industry | 2x 1x |

Market Findings

- Since various elements can influence the compensation levels within an organization (e.g., Compensation Philosophy, performance, market positioning, etc.), it is our practice to develop a statistical sample range from the data; therefore, data was collected at the 25th, weighted average, median, and 75th percentile (hereinafter referred to as the "Market Range"). Actual pay levels within the 25th to 75th percentile levels represent one-half (50%) of the sampled population and would be considered "within market".
- It is important to note that the methodology used to conduct the competitive market analysis contained in this report is based on the duties and responsibilities associated with each position, and does not take into consideration the incumbents or any factors relating to the incumbents. This is the standard and accepted procedure used to identify the market value of a position and to determine what the organization would have to provide in order to recruit and hire a fully qualified candidate for the position.
- A summary of the market study findings can be seen in the accompanying Excel workbook (**Market Findings Summary and Market Findings by Industry**).
- CR then compared the actual Base Salary of each incumbent to their respective Market Range to determine each incumbent's relative position against the market. This calculation identifies the incumbent's "Market Range Positioning", defined below.

Table 5
Relative Market Position Definitions

| Market Positioning | Definition |
|--------------------|---|
| Below | Incumbent's compensation falls below the minimum of the Market Range. |
| Within | Incumbent's compensation falls within the parameters of the Market Range. Typically represents that the incumbent's compensation is competitive with the marketplace for similar positions. |
| Above | Incumbent's compensation is above the Market Range. |

- The Actual Market Percentile was calculated so that FDDC can examine the degree of alignment of each incumbent to the Market Range.
- **Table 6** below presents a summary of the Base Salary Market Range Positioning for FDDC's employees, details of which are presented in **Base Salary Market Analysis** in the Excel file.

Table 6
Base Salary Market Findings Summary

| Band | # EEs | Percent |
|----------------------------------|----------|---------------|
| Below | 0 | 0.0% |
| Within | 6 | 75.0% |
| Above | 2 | 25.0% |
| Total | 8 | 100.0% |
| Average Actual Percentile | | 51.7% |

Salary Structure

- Based on the competitive marketplace, CR assessed the current salary structure in comparison to the market data and determined a new, more market driven salary structure was needed. The CR proposed salary structure can be seen in **the Salary Structure** worksheet in the Excel file.
- CR then calculated the Position-In-Range ("PIR") for all incumbents against FDDC's current and CR's proposed salary structures. The PIR indicates the extent to which an incumbent's Base Salary penetrates the salary range. Therefore, the "within grade" range is shown as 0% to 100%; no PIR is calculated for market values that are either below the grade minimum or above the grade maximum. The PIR was calculated for each employee based on the current grade assignment and in the updated salary ranges. The PIR analysis can be seen in **Current PIR and CR Proposed PIR** worksheets in the Excel file.
- Utilizing the PIR, Bands were calculated to show the relative position of each incumbent in the salary range. Each Band is defined as follows:

Table 7
Salary Structure Bands

| Band | Definition |
|---------------|--|
| Below | Incumbent's salary falls below the minimum of the grade. |
| Low | Incumbent's salary falls in approximately the first quartile or low band (PIR of 0%-24.9%) of the salary range. Typically represents new incumbents or those with lower experience levels. |
| Middle | Incumbent's salary falls in the middle portion of the salary range (PIR of 25.0%-74.9%). Typically represents the competitive market for the position. |
| High | Incumbent's salary falls in the upper quartile of the salary range (PIR of 75.0%-100%). May include long-service incumbents or those with high experience levels. |
| Above | Incumbent's salary is above the grade maximum. Typical arrangements call for pay freezing until the range is adjusted upward. |

- The Band distribution of employees included in the analysis within FDDC's current salary structure, is shown below in **Table 8**:

Table 8
FDDC Salary Structure Findings- Current Structure

| Band | Number | Percent |
|------------------------------------|----------|---------------|
| Below | 0 | 0.0% |
| Low | 0 | 0.0% |
| Middle | 3 | 37.5% |
| High | 2 | 25.0% |
| Above | 3 | 37.5% |
| Total | 8 | 100.0% |
| Average PIR | | 112.3% |
| Total Bring to Minimum Cost | | \$0 |

- The Band distribution of employees included in the analysis within CR's proposed salary structure, is shown below in **Table 9**:

Table 9
FDDC Salary Structure Findings- CR Proposed Structure

| Band | Number | Percent |
|------------------------------------|----------|---------------|
| Below | 0 | 0.0% |
| Low | 3 | 37.5% |
| Middle | 5 | 62.5% |
| High | 0 | 0.0% |
| Above | 0 | 0.0% |
| Total | 8 | 100.0% |
| Average PIR | | 34.0% |
| Total Bring to Minimum Cost | | \$0 |

US Geographic Differentials

- CR conducted research to determine the salary differentials from both the United States average and Tallahassee, FL to each region in Florida. The geographic differentials grid can be seen in the **Geo Grid** worksheet of the Excel file and in the table below:

Table 10
Geographic Differentials

| From United States Average to: | Average Geographic Differential |
|--------------------------------|---------------------------------|
| Panhandle Florida | 91.6% |
| Crown (North) Florida | 94.1% |
| East Central Florida | 94.1% |
| West Central Florida | 96.1% |
| South Florida | 101.2% |
| From Tallahassee, FL to: | Average Geographic Differential |
| Panhandle Florida | 102.8% |
| Crown (North) Florida | 105.6% |
| East Central Florida | 105.7% |
| West Central Florida | 107.8% |
| South Florida | 113.6% |

| FDCC Position Title | Survey Position Match | Industry | Weighting | 25th %ile | Market Avg | 75th %ile |
|--|---|---|-----------|------------------|------------------|------------------|
| Executive Director | Executive Director | Developmentally Disabled Services | 2x | \$130,500 | \$180,000 | \$234,900 |
| Executive Director | Executive Director | Not-For-Profit Services | 1x | \$146,200 | \$196,300 | \$245,300 |
| Executive Director | Executive Director | Market Concensus (Combined Weighted) | | \$135,700 | \$185,400 | \$238,400 |
| Chief of Operations & Finance (Exec level) | Top Finance/Operations Executive (50% each) | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$115,000 | \$146,800 | \$170,000 |
| Chief of Operations & Finance (Exec level) | Top Finance/Operations Executive (50% each) | For-Profit General Industry | 1x | \$136,500 | \$183,300 | \$214,400 |
| Chief of Operations & Finance (Exec level) | Top Finance/Operations Executive (50% each) | Market Concensus (Combined Weighted) | | \$122,200 | \$159,000 | \$184,800 |
| Chief of Programs & Research | Top Programs Executive w/ 10% premium for admin duties | Developmentally Disabled Services | 2x | \$133,400 | \$159,400 | \$179,300 |
| Chief of Programs & Research | Top Programs Executive w/ 10% premium for admin duties | Not-For-Profit Services | 1x | \$113,500 | \$136,300 | \$153,500 |
| Chief of Programs & Research | Top Programs Executive w/ 10% premium for admin duties | Market Concensus (Combined Weighted) | | \$126,800 | \$151,700 | \$170,700 |
| Chief of Operations & Finance (Director level) | Finance/Operations Director (50% each) | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$100,900 | \$115,300 | \$129,000 |
| Chief of Operations & Finance (Director level) | Finance/Operations Director (50% each) | For-Profit General Industry | 1x | \$109,500 | \$128,500 | \$149,600 |
| Chief of Operations & Finance (Director level) | Finance/Operations Director (50% each) | Market Concensus (Combined Weighted) | | \$103,800 | \$119,700 | \$135,900 |
| Director of Programs | Program Director w/ 10% for admin. duties | Developmentally Disabled Services | 2x | \$98,700 | \$112,300 | \$131,000 |
| Director of Programs | Program Director w/ 10% for admin. duties | Not-For-Profit Services | 1x | \$88,100 | \$103,300 | \$118,600 |
| Director of Programs | Program Director w/ 10% for admin. duties | Market Concensus (Combined Weighted) | | \$95,200 | \$109,300 | \$126,900 |
| Director, Public Policy & Advocacy | Government Affairs Manager | Developmentally Disabled Services | 2x | \$98,600 | \$113,100 | \$127,300 |
| Director, Public Policy & Advocacy | Government Affairs Manager | Not-For-Profit Services | 1x | \$93,500 | \$106,900 | \$120,100 |
| Director, Public Policy & Advocacy | Government Affairs Manager | Market Concensus (Combined Weighted) | | \$96,900 | \$111,000 | \$124,900 |
| Director, Contracts & Operations (Director level) | Contracts/Project Management Director | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$101,100 | \$119,200 | \$135,100 |
| Director, Contracts & Operations (Director level) | Contracts/Project Management Director | For-Profit General Industry | 1x | \$118,100 | \$135,700 | \$152,100 |
| Director, Contracts & Operations (Director level) | Contracts/Project Management Director | Market Concensus (Combined Weighted) | | \$106,800 | \$124,700 | \$140,800 |
| Director, Contracts & Operations (Manager level) | Contracts/Project Manager | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$82,400 | \$94,600 | \$105,100 |
| Director, Contracts & Operations (Manager level) | Contracts/Project Manager | For-Profit General Industry | 1x | \$100,600 | \$115,400 | \$129,700 |
| Director, Contracts & Operations (Manager level) | Contracts/Project Manager | Market Concensus (Combined Weighted) | | \$88,500 | \$101,500 | \$113,300 |
| Director, Contracts & Operations (Staff level) | Contracts Specialist/Project Administrator (7 years exp) | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$63,400 | \$74,600 | \$83,800 |
| Director, Contracts & Operations (Staff level) | Contracts Specialist/Project Administrator (7 years exp) | For-Profit General Industry | 1x | \$65,900 | \$77,400 | \$86,400 |
| Director, Contracts & Operations (Staff level) | Contracts Specialist/Project Administrator (7 years exp) | Market Concensus (Combined Weighted) | | \$64,200 | \$75,500 | \$84,700 |
| Executive Administrator | Executive Assistant (3 years exp) | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$52,400 | \$61,700 | \$71,500 |
| Executive Administrator | Executive Assistant (3 years exp) | For-Profit General Industry | 1x | \$55,900 | \$66,600 | \$77,100 |
| Executive Administrator | Executive Assistant (3 years exp) | Market Concensus (Combined Weighted) | | \$53,600 | \$63,300 | \$73,400 |
| Senior Director, State Plan & Evaluation | Contracts Director w/ 10% premium for level | Developmentally Disabled Services/Not-For-Profit Services | 2x | \$109,900 | \$126,100 | \$142,800 |
| Senior Director, State Plan & Evaluation | Contracts Director w/ 10% premium for level | For-Profit General Industry | 1x | \$129,200 | \$148,600 | \$169,300 |
| Senior Director, State Plan & Evaluation | Contracts Director w/ 10% premium for level | Market Concensus (Combined Weighted) | | \$116,300 | \$133,600 | \$151,600 |

Current FDDC Structure*

| Grade | Low | Middle Band | | | High | Range | Mid to Mid Percentage |
|-------|-----------|-------------|-----------|-----------|-----------|-------|-----------------------|
| | Minimum | 25th %ile | Midpoint | 75th %ile | Maximum | | |
| 22 | \$133,361 | \$142,622 | \$148,179 | \$161,145 | \$170,406 | 28% | 4% |
| 21 | \$128,232 | \$137,137 | \$142,480 | \$154,947 | \$163,852 | 28% | 5% |
| 20 | \$121,820 | \$130,280 | \$135,356 | \$147,200 | \$155,659 | 28% | 7% |
| 19 | \$101,246 | \$112,320 | \$126,558 | \$134,468 | \$145,542 | 44% | 7% |
| 18 | \$94,665 | \$105,019 | \$118,332 | \$125,727 | \$136,081 | 44% | 8% |
| 17 | \$87,565 | \$97,143 | \$109,457 | \$116,298 | \$125,875 | 44% | 8% |
| 16 | \$80,998 | \$89,857 | \$101,247 | \$107,575 | \$116,435 | 44% | 8% |
| 15 | \$74,923 | \$83,118 | \$93,654 | \$99,507 | \$107,702 | 44% | 8% |
| 14 | \$60,641 | \$70,387 | \$86,630 | \$89,878 | \$99,624 | 64% | 8% |
| 13 | \$56,093 | \$65,108 | \$80,133 | \$83,138 | \$92,153 | 64% | 8% |
| 12 | \$51,886 | \$60,225 | \$74,123 | \$76,902 | \$85,241 | 64% | 8% |
| 11 | \$47,994 | \$55,708 | \$68,563 | \$71,135 | \$78,848 | 64% | 8% |
| 10 | \$44,395 | \$51,530 | \$63,421 | \$65,800 | \$72,934 | 64% | 8% |
| 9 | \$41,065 | \$47,665 | \$58,665 | \$60,865 | \$67,464 | 64% | 8% |
| 8 | \$37,985 | \$44,090 | \$54,265 | \$56,300 | \$62,404 | 64% | 8% |
| 7 | \$35,136 | \$40,783 | \$50,195 | \$52,077 | \$57,724 | 64% | 8% |
| 6 | \$32,501 | \$37,725 | \$46,430 | \$48,171 | \$53,395 | 64% | 8% |
| 5 | \$30,064 | \$34,895 | \$42,948 | \$44,559 | \$49,390 | 64% | 6% |
| 4 | \$28,600 | \$33,088 | \$40,479 | \$42,063 | \$46,550 | 63% | 6% |
| 3 | \$28,080 | \$32,028 | \$38,151 | \$39,925 | \$43,874 | 56% | 6% |
| 2 | \$27,560 | \$31,008 | \$35,957 | \$37,903 | \$41,351 | 50% | 6% |
| 1 | \$27,040 | \$30,023 | \$33,890 | \$35,990 | \$38,973 | 44% | |

*CR calculated 25th and 75th percentiles for analysis purposes

CR Proposed Structure- Effective October 2025

| Grade | Low | Middle Band | | | High | Range | Mid to Mid Percentage |
|-------|-----------|-------------|-----------|-----------|-----------|-------|-----------------------|
| | Minimum | 25th %ile | Midpoint | 75th %ile | Maximum | | |
| 22 | \$144,634 | \$168,137 | \$191,640 | \$215,143 | \$238,646 | 65% | 15% |
| 21 | \$125,768 | \$146,206 | \$166,643 | \$187,081 | \$207,518 | 65% | 15% |
| 20 | \$109,364 | \$127,136 | \$144,907 | \$162,679 | \$180,450 | 65% | 12% |
| 19 | \$97,646 | \$113,514 | \$129,381 | \$145,249 | \$161,116 | 65% | 12% |
| 18 | \$87,184 | \$101,352 | \$115,519 | \$129,687 | \$143,854 | 65% | 12% |
| 17 | \$77,843 | \$90,493 | \$103,142 | \$115,792 | \$128,441 | 65% | 12% |
| 16 | \$69,503 | \$80,797 | \$92,091 | \$103,385 | \$114,679 | 65% | 12% |
| 15 | \$62,056 | \$72,140 | \$82,224 | \$92,308 | \$102,392 | 65% | 10% |
| 14 | \$56,415 | \$65,582 | \$74,749 | \$83,917 | \$93,084 | 65% | 10% |
| 13 | \$51,286 | \$59,620 | \$67,954 | \$76,288 | \$84,622 | 65% | 10% |



**2025 Benefits Study
Report of Findings
Discussion Draft**

April 9, 2025



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Objective

EA Compensation Resources LLC (hereinafter "Compensation Resources" or "CR") was engaged by Florida Developmental Disabilities Council, Inc. (hereinafter also referred to as "FDDC" or the "Organization") to undertake a benchmark study of its benefits package. The results of this study will allow the FDDC to better understand its benefits offerings as compared to similar market segments (industry and geography).

Methodology

Compensation Resources collected and reviewed information on the current benefits package offered to FDDC's employees. Thereafter, Compensation Resources collected published survey data in order to compare the FDDC's benefits plans to other organizations within the following sectors:

- Not-for-Profit sector in the Southeast region of the United States
- "All Industry" sector in the Southeast region of the United States, where Not-for-Profit data was not available

A list of surveys utilized for this study can be found in **Attachment A**.

Compensation Resources collected data on the following benefits:

- | | |
|-----------------------------------|-------------------------------|
| ○ Medical Coverage | ○ Retirement Benefits |
| ○ Dental Coverage | ○ Education Assistance |
| ○ Vision Coverage | ○ Employee Assistance Program |
| ○ Health Savings Account (HSA) | ○ Flexible Schedule |
| ○ Flexible Spending Account (FSA) | ○ Commuter Benefits |
| ○ PTO Days | ○ Auto Benefits |
| ○ Sick Days | ○ Health & Wellness Benefits |
| ○ Holidays | ○ Mobile Allowance Benefits |
| ○ Jury Duty | ○ Pet Insurance Benefits |
| ○ Bereavement Days | ○ Misc Perks & Benefits |
| ○ Maternity/Parental/Family Leave | |
| ○ Military Leave | |
| ○ Life and AD&D Insurance | |
| ○ Short-Term Disability Benefits | |
| ○ Long-Term Disability Benefits | |

FDDC's Benefits Scorecard

We have prepared the following scorecard which illustrates FDDC's competitiveness with respect to its benefit offerings. The areas where the benefit is not offered provide an opportunity to reassess those specific offerings.

FDDC's Benefits Scorecard

| Benefit | Not Offered | Not Competitive | Competitive | Very Competitive |
|---------------------------------|-------------|-----------------|-------------|------------------|
| Medical Coverage | | ✓ | | |
| Dental Coverage | | | ✓ | |
| Vision Coverage | ✓ | | | |
| Health Savings Account (HSA) | ✓ | | | |
| Flexible Spending Account (FSA) | ✓ | | | |
| PTO Days | | | | ✓ |
| Sick Days | ✓ | | | |
| Holidays | | ✓ | | |
| Jury Duty | | ✓ | | |
| Bereavement Days | | ✓ | | |
| Maternity/Parental/Family Leave | ✓ | | | |
| Military Leave | | ✓ | | |
| Life and AD&D Insurance | | | ✓ | |
| Short-Term Disability Benefits | | | ✓ | |
| Long-Term Disability Benefits | | | ✓ | |
| Retirement Benefits | | | | ✓ |
| Education Assistance | | | ✓ | |
| Employee Assistance Program | | | ✓ | |
| Flexible Schedule | | | ✓ | |
| Commuter Benefits | ✓ | | | |
| Auto Benefits | | | ✓ | |
| Health & Wellness Benefits | ✓ | | | |
| Mobile Allowance Benefits | ✓ | | | |
| Pet Insurance Benefits | ✓ | | | |
| Misc Perks & Benefits | ✓ | | | |

Findings

The following tables provide an overview of FDCC's benefits package, as compared to typical benefits provided within the Not-For-Profit Industry sector in the Southeast United States.¹

Medical Coverage HMO Plan

</

¹ All prevalence percentages were rounded to the nearest whole percent.

Dental Coverage

| FDDC | | | | | Southeast NFP | |
|--|-------------------------------------|-------------------------------------|-----------------------------|-----------------------|--|--|
| <ul style="list-style-type: none"> FDDC offers a dental insurance plan through Guardian. Monthly premium cost paid by Full-Time employees: | | | | | <ul style="list-style-type: none"> 83% of participants offer dental insurance. | |
| | Employer Monthly Contribution | Employee Monthly Contribution | Total Monthly Premium | % paid by Employer | Prevalent premium monthly cost: Employee paid: | |
| Employee Only | \$29.32 | \$0 | \$29.32 | 100% | <ul style="list-style-type: none"> Employee Only \$0.01- \$24.99 Employee + One \$50.01 and over Employee + Family \$50.01 and over | |
| Employee + Spouse | \$29.32 | \$30.20 | \$59.52 | 49% | | |
| Employee + Children | \$29.32 | \$35.66 | \$64.98 | 45% | | |
| Employee + Family | \$29.32 | \$68.51 | \$97.83 | 30% | | |

Vision Coverage

| FDDC | | | | | Southeast NFP | |
|--|--|--|--|--|--|--|
| <ul style="list-style-type: none"> FDDC does not offer a vision insurance plan. | | | | | <ul style="list-style-type: none"> 92% of participants offer vision insurance; 10% of participants include vision in their health plan. | |
| | | | | | Prevalent premium monthly cost: Employee paid: | |
| | | | | | <ul style="list-style-type: none"> Employee Only Up to \$9 Employee + One Up to \$9 Employee + Family \$10- \$24 | |

Health Savings Account (HSA)

| FDDC | Southeast NFP |
|--|--|
| <ul style="list-style-type: none"> FDDC does not offer employees to contribute to a Health Savings Account (HSA) account. | <ul style="list-style-type: none"> 77% of participants offer a medical HSA when employees are enrolled in a HDHP. |

Flexible Spending Account (FSA)

| FDDC | Southeast NFP |
|--|--|
| <ul style="list-style-type: none"> FDDC does not offer a Flexible Spending Account (FSA) to eligible employees. | <ul style="list-style-type: none"> 82% of participants offer a medical FSA. |

PTO

| FDDC | Southeast NFP | | | | | | | | | | | | | | | | | | | | | | | | |
|---|------------------|---------|---------------|---------|----------------|---------|-----------------|---------|---|------------------------------|---------|---------|---------|---------------|---------|---------------|---------|-----------------|---------|-----------------|---------|------------------|---------|------------------|---------|
| <ul style="list-style-type: none"> Regular full-time employees at FDDC are eligible for PTO. <p>Annual PTO accrual by years of service:</p> <table border="1"> <tr> <td>During 1st year:</td><td>23 days</td></tr> <tr> <td>1 to 5 years:</td><td>23 days</td></tr> <tr> <td>6 to 10 years:</td><td>30 days</td></tr> <tr> <td>10 to 15 years:</td><td>33 days</td></tr> </table> <ul style="list-style-type: none"> Employees can carry over a maximum of 50% of their unused days. Upon termination, employee is paid for unused earned PTO at 2/3 of accrued/unused PTO rate. Regular part-time employees are eligible for PTO at a prorated rate of 75% of the rate of a regular full-time employee and will be allowed carry over on the same prorated basis. | During 1st year: | 23 days | 1 to 5 years: | 23 days | 6 to 10 years: | 30 days | 10 to 15 years: | 33 days | <ul style="list-style-type: none"> 37% of participants offer a formal PTO program to their employees. <p>Annual PTO accrual by years of service:</p> <table border="1"> <tr> <td>During 1st year:</td><td>10 days</td></tr> <tr> <td>1 year:</td><td>17 days</td></tr> <tr> <td>2 to 4 years:</td><td>18 days</td></tr> <tr> <td>5 to 9 years:</td><td>22 days</td></tr> <tr> <td>10 to 14 years:</td><td>26 days</td></tr> <tr> <td>15 to 19 years:</td><td>27 days</td></tr> <tr> <td>20 to 30+ years+</td><td>29 days</td></tr> <tr> <td>Maximum Accrual:</td><td>29 days</td></tr> </table> <ul style="list-style-type: none"> 14% of participants offer unlimited PTO. 94% of participants allow PTO to carryover, with a maximum of 23 days. | During 1 st year: | 10 days | 1 year: | 17 days | 2 to 4 years: | 18 days | 5 to 9 years: | 22 days | 10 to 14 years: | 26 days | 15 to 19 years: | 27 days | 20 to 30+ years+ | 29 days | Maximum Accrual: | 29 days |
| During 1st year: | 23 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 to 5 years: | 23 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 to 10 years: | 30 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 to 15 years: | 33 days | | | | | | | | | | | | | | | | | | | | | | | | |
| During 1 st year: | 10 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 year: | 17 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 to 4 years: | 18 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 to 9 years: | 22 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 to 14 years: | 26 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 to 19 years: | 27 days | | | | | | | | | | | | | | | | | | | | | | | | |
| 20 to 30+ years+ | 29 days | | | | | | | | | | | | | | | | | | | | | | | | |
| Maximum Accrual: | 29 days | | | | | | | | | | | | | | | | | | | | | | | | |

PTO Accrual Method (All Industry Sector)

- 49% of participants accrue by years of service.
- 45% of participants accrue by hours worked & years of service.
- 6% of participants accrue by hours worked.

Sick Days

| FDDC | Southeast NFP |
|---|--|
| <ul style="list-style-type: none"> FDDC's PTO policy is intended for use in connection with illness. | <ul style="list-style-type: none"> 67% of participants offer paid sick time. 92% of participants have sick days included in PTO. |

Holidays

| FDDC | Southeast NFP |
|---|--|
| <ul style="list-style-type: none"> FDDC provides ten (10) paid holidays, as seen below, per year to all eligible employees. <ul style="list-style-type: none"> New Year's Day MLK Day Memorial Day Independence Day Labor Day Veteran's Day Thanksgiving Day Day after Thanksgiving Christmas Eve Christmas Day FDDC offers one (1) floating holiday, in addition to the paid holidays listed above. | <ul style="list-style-type: none"> The average number of paid holidays provided to exempt and non-exempt employees is thirteen (13). 49% of organizations reported floating holidays were included in their paid holidays. On average, two (2) floating holidays were allotted to employees. The six most commonly offered holidays are listed below. <ul style="list-style-type: none"> New Year's Day Memorial Day Independence Day Labor Day Thanksgiving Day Christmas Day |

Jury Duty

| FDDC | All Industry Sectors |
|--|--|
| <ul style="list-style-type: none"> ○ FDDC provides paid jury duty leave for all employees. ○ Any employee summoned for jury duty shall be granted a leave of absence up to one (1) full work week and will be paid their regular rate. | <ul style="list-style-type: none"> ○ 86% of participants provide paid jury duty leave. ○ The average number of paid days provided is nine (9). ○ 65% of organizations report no limit on the number of paid jury duty days. |

Bereavement Days

| FDDC | All Industry Sectors |
|---|--|
| <ul style="list-style-type: none"> ○ FDDC provides full-time and part-time employees with paid bereavement leave consisting of three (3) working days. | <ul style="list-style-type: none"> ○ 92% of participants offer paid bereavement leave. ○ The average number of days provided is four (4) per occurrence. |

Maternity/Parental/Family Leave

| FDDC | All Industry Sectors |
|--|---|
| <ul style="list-style-type: none"> ○ Eligible employees may be entitled for 12 weeks of unpaid pregnancy and parental leave under the FMLA. | <ul style="list-style-type: none"> ○ 58% of participants offer paid maternity/paternity/adoption leave. The average number of paid days provided is forty-two (42). ○ 17% of participants offer paid family illness leave. The average number of paid days provided is thirty-one (31). |

Military Leave

| FDDC | All Industry Sectors |
|---|---|
| <ul style="list-style-type: none"> ○ FDDC provides an unpaid leave of absence for military commitments as required by federal and state laws for however long the term of enlistment is. | <ul style="list-style-type: none"> ○ 45% of participants provide paid military leave. ○ The average number of paid days provided is sixty-four (64). ○ 58% of organizations report no limit on the number of paid military leave days. |

Life and AD&D Insurance

| FDDC | Southeast NFP |
|---|---|
| <ul style="list-style-type: none"> FDDC provides employees with a \$50,000 basic life and AD&D insurance and covers 100% of the cost. An accidental death benefit is also included which is 2x the benefit amount should the death be due to an accident. | <ul style="list-style-type: none"> 97% of participants offer basic life insurance. 42% of participants use a multiple of pay to calculate coverage amount; 46% of participants use flat dollar amounts to calculate coverage amount. 52% of participants use 1x salary; 23% use 2x salary. |

Short-Term Disability Benefits

| FDDC | Southeast NFP | | | | | | | | | | |
|--|--|----------|-----------------------|-----|--------------------|---------|----------------|--|-------------------|----------------|--|
| <ul style="list-style-type: none"> FDDC offers a short-term disability benefit to all eligible employees. <table border="1"> <thead> <tr> <th>Short-Term Disability</th><th>Coverage</th></tr> </thead> <tbody> <tr> <td>Weekly Benefit Amount</td><td>60%</td></tr> <tr> <td>Weekly Benefit Max</td><td>\$1,000</td></tr> <tr> <td>Benefits Begin</td><td>1 day after an accident and 8 days after an illness.</td></tr> <tr> <td>Benefits Duration</td><td>Up to 26 weeks</td></tr> </tbody> </table> The cost of the plan is based on employee salary. | Short-Term Disability | Coverage | Weekly Benefit Amount | 60% | Weekly Benefit Max | \$1,000 | Benefits Begin | 1 day after an accident and 8 days after an illness. | Benefits Duration | Up to 26 weeks | <ul style="list-style-type: none"> 70% of participants offer short-term disability insurance: <ul style="list-style-type: none"> The average % of weekly earnings is 63%. The average maximum weekly benefit is \$1,547. The maximum number of weeks is 13. |
| Short-Term Disability | Coverage | | | | | | | | | | |
| Weekly Benefit Amount | 60% | | | | | | | | | | |
| Weekly Benefit Max | \$1,000 | | | | | | | | | | |
| Benefits Begin | 1 day after an accident and 8 days after an illness. | | | | | | | | | | |
| Benefits Duration | Up to 26 weeks | | | | | | | | | | |

Long-Term Disability Benefits

| FDDC | Southeast NFP | | | | | | | | | | |
|---|---|----------|------------------------|-----|---------------------|---------|----------------|----------------|-------------------|---|--|
| <ul style="list-style-type: none"> FDDC offers a long-term disability benefit to all eligible employees. <table border="1"> <thead> <tr> <th>Long-Term Disability</th><th>Coverage</th></tr> </thead> <tbody> <tr> <td>Monthly Benefit Amount</td><td>60%</td></tr> <tr> <td>Monthly Benefit Max</td><td>\$5,000</td></tr> <tr> <td>Benefits Begin</td><td>After 181 days</td></tr> <tr> <td>Benefits Duration</td><td>Until age 65 or SS Normal Retirement Age.</td></tr> </tbody> </table> <ul style="list-style-type: none"> The plan is fully funded by FDDC. | Long-Term Disability | Coverage | Monthly Benefit Amount | 60% | Monthly Benefit Max | \$5,000 | Benefits Begin | After 181 days | Benefits Duration | Until age 65 or SS Normal Retirement Age. | <ul style="list-style-type: none"> 72% of participants offer long-term disability insurance: <ul style="list-style-type: none"> The average % of monthly earnings is 61%. The average maximum monthly benefit is \$10,093. |
| Long-Term Disability | Coverage | | | | | | | | | | |
| Monthly Benefit Amount | 60% | | | | | | | | | | |
| Monthly Benefit Max | \$5,000 | | | | | | | | | | |
| Benefits Begin | After 181 days | | | | | | | | | | |
| Benefits Duration | Until age 65 or SS Normal Retirement Age. | | | | | | | | | | |

Retirement Benefits

| FDDC | Southeast NFP |
|---|--|
| <ul style="list-style-type: none"> FDDC offers a 401(k) Retirement Savings Plan to eligible employees upon hire. FDDC contributes a one-to-one % of the employee's salary up to 6%. Qualifying participants are 50% vested after 2 years of working 1,000 hours each year and 100% vested after 3 years of service of working 1,000 hours each year. | <ul style="list-style-type: none"> 39% of participants offer a 401(k) plan with employer contribution. 3% of participants offer a 401(k) plan with no employer contribution. The maximum % salary matched is 4% The average vesting period is 2 years. |

Education Assistance

| FDDC | Southeast NFP |
|---|--|
| <ul style="list-style-type: none"> FDDC offers eligible employees payments or reimbursements for training, workshops, conference and tuition (and related costs) for education courses. Such must be related to the employee's current job duties, improvement of competencies for the current position, or a foreseeable-future position in the organization. | <ul style="list-style-type: none"> 93% of participants offer tuition reimbursement. The average annual maximum tuition reimbursement benefit is \$4,269. |

Employee Assistance

| FDDC | Southeast NFP |
|--|---|
| <ul style="list-style-type: none"> FDDC offers an Employee Assistance Program to its employees. | <ul style="list-style-type: none"> 85% of participants offer an Employee Assistance Program. |

Flexible Schedule

| FDDC | All Industry Sector |
|---|--|
| <ul style="list-style-type: none"> FDDC allows employees to follow a hybrid or work from home model if their position allows it. | <ul style="list-style-type: none"> 91% of participants offer hybrid work arrangements. 72% of participants offer part time/reduced-work schedules. 45% of participants offer shift flexibility. 35% of participants offer a compressed workweek. |

Commuter Benefits

| FDDC | All Industry Sector |
|---|--|
| <ul style="list-style-type: none"> FDDC does not offer commuter benefits to its employees. | <ul style="list-style-type: none"> 33% of survey participants offer a tax advantaged option for commuter benefits. 58% of survey participants provide a parking subsidy to their employees. <p>The current IRS tax limit for transit and parking expenses with pre-tax money is \$300 per month.</p> |

Auto Benefits

| FDDC | All Industry Sector |
|---|--|
| <ul style="list-style-type: none"> FDDC provides mileage reimbursement to all positions at the IRS allowance of 67 cents per mile. | <ul style="list-style-type: none"> Many employers choose to do mileage reimbursement at the IRS rate, currently 70 cents per mile. This reimbursement is tax free if it does not exceed the current IRS standard mileage rate. The mileage rate covers variable costs for vehicle operations such as gasoline, oil, tires, maintenance, and repairs. It also covers fixed costs for vehicle operations such as insurance, registration, depreciation, and leasing. Use of this rate is optional for private employers, though it is widely used as a standard rate for calculating mileage reimbursement for employees who use their personal vehicles for business purposes. |

Health & Wellness Benefits

| FDDC | All Industry Sector | | | | | | | | | | |
|---|---|--------------------------|-----|----------------------|-----|--------------------|-----|-------------------------|-----|-------------------|-----|
| <ul style="list-style-type: none"> FDDC does not offer any wellness benefits to its employees. | <ul style="list-style-type: none"> 66% of participants offer Health & Wellness benefits. 40% of participants offer physical fitness facility access. Top 5 reported wellness benefits: <table> <tr> <td>Flu Shots/Immunizations:</td><td>78%</td></tr> <tr> <td>Biometric Screening:</td><td>62%</td></tr> <tr> <td>Tobacco Cessation:</td><td>60%</td></tr> <tr> <td>Health Risk Assessment:</td><td>60%</td></tr> <tr> <td>Annual Physicals:</td><td>60%</td></tr> </table> | Flu Shots/Immunizations: | 78% | Biometric Screening: | 62% | Tobacco Cessation: | 60% | Health Risk Assessment: | 60% | Annual Physicals: | 60% |
| Flu Shots/Immunizations: | 78% | | | | | | | | | | |
| Biometric Screening: | 62% | | | | | | | | | | |
| Tobacco Cessation: | 60% | | | | | | | | | | |
| Health Risk Assessment: | 60% | | | | | | | | | | |
| Annual Physicals: | 60% | | | | | | | | | | |

Mobile Allowance Benefits

| FDDC | All Industry Sector |
|---|---|
| <ul style="list-style-type: none"> FDDC does not offer any mobile benefits to its employees. | <ul style="list-style-type: none"> 80% of survey participants offer an employer-issued cell phone, monthly allowance or reimbursement. Those that provide a mobile device to their employees report the average annual cost associated with this is \$1,234 (including the device, mobile plan, software, and management). Those that pay a monthly stipend to employees to compensate them for the use of their personal mobile device report the average mobile stipend per month across is \$40.20, or \$482 per year per employee. |

Pet Insurance Benefits

| FDDC | All Industry Sector | | | | | | | | | | | | | | | | | | |
|--|--|----------------------------------|--|------|----------|------|------------|--------------------|--|------|----------|------|----------|---------------|--|------|----------|------|----------|
| <ul style="list-style-type: none"> FDDC does not offer any pet insurance benefits to its employees. | <ul style="list-style-type: none"> 48% of survey participants offer pet insurance. The following table displays the average annual premium per Cat and per Dog for 2023: <table border="1"> <thead> <tr> <th colspan="2">Insurance with Embedded Wellness</th></tr> </thead> <tbody> <tr> <td>Cats</td><td>\$625.99</td></tr> <tr> <td>Dogs</td><td>\$1,263.39</td></tr> <tr> <th colspan="2">Accident & Illness</th></tr> <tr> <td>Cats</td><td>\$383.30</td></tr> <tr> <td>Dogs</td><td>\$675.61</td></tr> <tr> <th colspan="2">Accident Only</th></tr> <tr> <td>Cats</td><td>\$116.11</td></tr> <tr> <td>Dogs</td><td>\$204.16</td></tr> </tbody> </table> | Insurance with Embedded Wellness | | Cats | \$625.99 | Dogs | \$1,263.39 | Accident & Illness | | Cats | \$383.30 | Dogs | \$675.61 | Accident Only | | Cats | \$116.11 | Dogs | \$204.16 |
| Insurance with Embedded Wellness | | | | | | | | | | | | | | | | | | | |
| Cats | \$625.99 | | | | | | | | | | | | | | | | | | |
| Dogs | \$1,263.39 | | | | | | | | | | | | | | | | | | |
| Accident & Illness | | | | | | | | | | | | | | | | | | | |
| Cats | \$383.30 | | | | | | | | | | | | | | | | | | |
| Dogs | \$675.61 | | | | | | | | | | | | | | | | | | |
| Accident Only | | | | | | | | | | | | | | | | | | | |
| Cats | \$116.11 | | | | | | | | | | | | | | | | | | |
| Dogs | \$204.16 | | | | | | | | | | | | | | | | | | |

Misc Perks & Benefits

| FDDC | All Industry Sector |
|---|--|
| <ul style="list-style-type: none"> FDDC does not offer any perquisites to its employees. | <ul style="list-style-type: none"> 20% of participants offer an on-site or takeout meals reimbursement. 72% of participants offer employee discounts. 50% of participants offer service awards. |

Areas for Consideration

As a result of the benefits assessment, overall, FDDC's benefits package is not competitive with the external marketplace. There are areas where changes to benefits or additional benefits may allow the package to be more attractive to employees. Below are suggested changes to be considered by the FDDC:

Health Benefits

- Review other available medical plans. HMO plans are known to be limited since there is no out of network coverage and restricts the provider of choice. The plan itself is good for the low premiums, but HMO's limit individuals to only selective providers. Younger individuals make out better with this type of plan, while older individuals or employees with families don't have the best benefit. Nonetheless, given the fact that FDDC is a small nonprofit, this age band and HMO might be the best offering for the Organization compared to other offerings.
- Eliminate the waiting period so benefits are effective on the first day of employment.

Dental/Vision

- Add a vision plan for employees. Guardian offers both Dental and Vision plans.

Leave

- Eliminate sick and vacation and institute an unlimited PTO Program where there is no maximum.
- Add an additional Floating Holiday or another holiday: Presidents' Day, Juneteenth, Indigenous Peoples' Day.
- Consider a paid family leave program.
- Add a program where employees get paid to volunteer or do community service.

Attachment A: Published Survey List

| Survey Title | Publisher | Effective Date |
|--|--|----------------|
| Benefits USA | CompData Surveys | 2023 |
| State of the Industry Report | National American Pet Health Insurance Association | 2024 |
| Maximizing Mobile Value: Mobile Allowance Survey | Oxford Economics | 2022 |
| Total Rewards Inventory Programs & Practices | WorldatWork | 2023 |

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TIMELINE

- First Draft by May
- Final Draft for adoption September 2025

ATTORNEY Timeline for Review

- Options presented:
 - Hourly review
 - Full rewrite
- Pending (Cost \$400 hour)

Meeting Schedule:

- Wednesdays 5:30 p.m.

Facilitation:

- Caitlyn will fill in for Enrique to facilitate in his absence.

Members of Task:

Board Members

- Carla Mercer
- Charlotte Temple
- Caitlyn Clibbon
- Danielle McGill
- Eddie Hall
- Enrique Escallon
- Yolanda Herrera

Staff and Lawyer

- Valerie Breen
- George Leveske
- Susan Kabot
- Kisten Conlin

| | |
|---|--|
| Article I: Title | No Changes |
| Article II: Purpose Added a footnote to Section A.3 | “Measure the purpose of the 5-year plan against the Principles in the bylaws.” |
| Article III: Membership Added a footnote in Section C. | <p>“Official inclusion of DCF as member of the Council even if not prescribed in the DD Act.”</p> <p>Listed the Agencies that meet the requirements in bullet C.1 “Agencies in the State of Florida that meet these requirements are:</p> <ul style="list-style-type: none"> i. Department of Education. ii. Division of Vocational Rehabilitation (Rehabilitation Act of 1973). iii. Agency for Persons with Disabilities (state Developmental Disabilities agency). iv. Department of Education. v. Bureau of Exceptional Education and Student Services (Individuals with Disabilities Education Act) vi. ; Department of Elder Affairs (Older American Act); vii. Department of Health, Children’s Medical Services (Title V); viii. Agency for Health Care Administration and Department of Children and Families (Title XIX of the Social Security Act).” <p>Listed UCEDD’s that meet the requirements in bullet C.2 Universities in the State of Florida that meet these requirements are:</p> <ul style="list-style-type: none"> i. University of Miami, Mailman Center. ii. University of South Florida, Florida Center for Inclusive Communities. <p>Listed the State Protection and advocacy System.in bullet C.3</p> <ul style="list-style-type: none"> i. Disability Rights Florida, Inc. <p>In bullet C.4 added One</p> <p>4. One local and nongovernmental agency that provide services to individuals with intellectual and developmental disabilities.</p> <p>In bullet C.5 Changed “Private” for “One”</p> <p>1. Private One nonprofit groups concerned with services for individuals with intellectual and developmental disabilities.</p> |

| | |
|---|--|
| <p>Article III: Membership Section E. the following questions were raised. Bullets 1-5 will require legal opinion.</p> | <ul style="list-style-type: none"> • How can we codify term limits in a way that is not a conflict? • Governor doesn't appoint expeditiously... • ED provides recommendation to Governor office for open position... • Voting in officers...when terms have expired with the Governor can they apply to be an officer of the Council even though they are remaining in a seat? • How do we avoid losing leadership? <p>In bullet E.1 (8 years total) was added at the end of the paragraph.</p> <p>1. A member may be appointed to a second successive term. (8 years total)</p> <p>In bullet E.2 "his or her" was replaced by "a" and a question was raised about Administrative rule requiring appointments by the Governor.</p> <p>2. Any member desiring to resign from the Council shall submit a resignation in writing to the Council Chair and the Executive Director of the Council who will forward a copy to the Governor</p> <p>Additional questions were raised that may require consideration:</p> <ul style="list-style-type: none"> • Can we assign people to seats that are not appointed to the Governor? • What voting capacity do they have? • Can we conduct business without appointments. • What is leeway that we have? • Federal statute? |
| <p>Article III: Membership Section F. The following recommendations for P&P's</p> | <ul style="list-style-type: none"> • Get policies/procedures for this in Executive Committee for following attendance. • Executive Committee review absences annually. • Appropriate action defined? <ul style="list-style-type: none"> ○ Notify member...opportunity and then consequences.... ○ have a process to follow for the appropriate action. ○ Where to start and each step to take- notify them... ○ Exec keeps track...corrective action for the member to take. |
| <p>Article III: Membership Section G Recommended to be reviewed by Legal opinion.</p> | <ul style="list-style-type: none"> • Is this the correct procedure or should it be something that needs to be re-considered? • Executive Committee make recommendation with full board vote. Transparency and accountability. • Have EC investigate, gather info etc. Must create a process. • Does the process need to be clarified in the bylaws. • Clear and detailed process. • Does there need to be a policy/procedure document for the board or laid out in the bylaws? |
| <p>Article III: Membership Section I _Conflict of Interest</p> | <p>In bullet I.3 "immediately upon discovering the conflict: was added</p> <p>3. Should a conflict of interest arise, a member must declare his/her conflict of interest and recuse him or herself from voting related to the issue immediately upon discovering the conflict.</p> |

| | |
|--|---|
| <p>Everyone agreed that this section was clear.</p> | <p>The Chair will have discretion to determine if a member with a conflict of interest will need to leave the room during the discussion.</p> <p>If the issue is policy-related, the member may offer information on the issue but shall not advocate or attempt to influence the decision. The member will then leave the meeting for the balance of the discussion and voting on the issue.</p> <p>If the issue is related to Council funding or any other non-policy-related issue, a member must leave the room and recuse him or herself from any discussion, deliberation, and/or vote regarding the matter.</p> <p>The following question and concerns arose after the second paragraph:</p> <ul style="list-style-type: none"> • If a declaration of conflict occur prior to the vote- in the middle I have a conflict, disclose it. • Do not have conflict in an initial discussion, at what time do I recuse myself. • Would this go in policies and procedures. Wants override for the recusal...what is the responsibility under Florida Sunshine? • Can we make people leave the room? • Only limited to public comment and cannot vote. • Have to allow public access and public comment- consider their comments. • If person already voted and conflict is discovered • If discovered then could we strike their vote and have process • if it impacts the vote and have a re-voting process that impacts the outcome? |
| <p>Article III: Membership Section J Just needs some clarification.</p> | <p>J. The members of the Council, its committees and its task forces serve without financial compensation, but they shall be entitled to approved travel or personal care expenses incurred in attending Council meetings and other pre-approved program Council related sponsored functions.</p> <p>What is program? Non-exhausted list of functions.</p> |
| <p>Article III: Membership Section K</p> | <p>No changes but it was noted the Policies and Procedures and Policies referenced need to be reviewed to ensure relevancy.</p> |
| <p>Article IV: Officers</p> | <p>The following issues were considered.</p> <ul style="list-style-type: none"> • Add a Secretary position? Responsible for oversight of corporation papers, minutes, assist with taking minutes. Make sure person is trained in taking minutes • Define More than one term in a position? What is the term? Two years. If a person is re-elected to the same position more than once? No. cannot serve more than one term in their current elected position. • Chair and Chair Elect for two years and then moves directly into the Chair position? • Logistics of succession...functions would not change only the logistics/process. New members won't have an opportunity to shine-give opportunity to shine by keeping the way it is? |

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| | <ul style="list-style-type: none"> • We have four year terms- the only person who could run is a brand new board member. • Requirement for the person to serve as a Chair must be on the Council a minimum of? • Uniqueness again for being a board as a not for profit versus an advisory governor appointed board under the DD Act? • Give more opportunities for all the members. put limitations on when someone from the council can apply to staff and when a staff can apply to the Council? • Delay of staff/board member to change roles. Should there be a waiting period? Resign and cooling period. Full Council can override the decision- involve the whole Council Person has to recuse themselves. Policy to waive one year period....why we would waive the one year. Waiving a cooling off period may be a problem for the Council. Do we want a cooling off period or not? Bring question to the legal review • When would you waive the cooling off period- would it open up the Council to discrimination. When are elections held? • If not one year on the Council cannot be on Executive committee. Two year cycle between Chair/Vice Chair. Yearly election for Vice Chair |
| Article IV: Officers Section A | <p>In bullet A.7 it was recommended to engage full council before the vote.</p> <p>A. In bullet A.8 the words “and engagement” To encourage active involvement and engagement of all Council members.</p> <p>Bullet A.9 was added.</p> <p>B. The Council Chair appoints the Chair and members of the standing committees with input from the Executive Director.</p> |
| Article IV: Officers Section D Duties of the Secretary: | <p>This Section needs development.</p> <p>1. If so, define the position- spread the workload. For Council members to have leadership opportunity.</p> |
| Article V: Committees Section A & B no changes but bulleted | <p>A. Standing Committees: Standing committees of the Council shall be the:</p> <ol style="list-style-type: none"> 1. Executive Committee, 2. Finance Committee, 3. State Plan Committee, 4. and the Public Policy Committee. <p>B. Executive Committee: The Executive Committee shall be comprised of the:</p> <ol style="list-style-type: none"> 1. Council Chair, 2. Vice-Chair, 3. Treasurer, |

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| | <p>4. Two (2) at-large members who are appointed by the Council Chair</p> <p>5. (2) elected at-large members. Change to 1 elected at-large.</p> <p>In Executive committee's duties was recommended to put more engagement of executive committee to communicate with all the members. More transparency. Do we want to reduce one of these. Thought is removing one elected since Secretary is now being elected. Keep two at large appointed by Chair and one elected..</p> |
| Article V: Committees Section C Finance Committee | Write procedures for more monitoring based on financial checks and balances. Best practice recommendation for finance committee. Thomas Howell Ferguson will be recommending best practice policies ad procedures. |
| Article V: Committees Section G: | <p>Deleted "Appointments: The Council Chair and members of the standing commites with input from the Executive Director."</p> <p>it will read:</p> <p>G. Committees and task forces shall be comprised of not less than three (3) Council members.</p> |
| Article V: Committees Section H: Ad hoc Committees/Task Forces:: | <p>New</p> <p>H. Ad hoc Committees/Task Forces: Can be established by the Chair for specific issues, is time limited in duration with reporting responsibility to the full the Council.</p> |
| Article VI: Elections | No Changes |
| Article VII: Meetings: | Clarify what "present" means for both quorum count and voting. . |
| Article VIII: Indemnification: | <p>No Changes</p> <p>If review required defer to Legal</p> |
| Article IX: Bylaws Amendments: | No Changes |

ARTICLE I: TITLE

The Florida Developmental Disabilities Council, Inc. (herein and after referred to as the "Council"), is established with respect to the state's participation in the Developmental Disabilities Program in accordance with the provisions of the Developmental Disabilities Assistance and Bill of Rights Act, P.L.106-402 Final Rule, 45 CFR Part 1386 (42 U.S.C. 15001, et. seq.), and subsequent federal laws and regulations.

ARTICLE II: PURPOSE

- A. The purpose of the Council is to engage in advocacy, capacity building, and systemic change activities that contribute to a coordinated, person- and family-centered, person- and family-directed, comprehensive system of community services and individualized supports that enable individuals with intellectual and developmental disabilities to exercise self-determination, be independent, and be integrated and included in all facets of community life.
- To this purpose, the duties of the Council are:
1. To advocate on behalf of persons with intellectual and developmental disabilities.
 2. To advise the executive and legislative branches of government and the private sector on programs, policies, and proposed legislation about current and potential services for persons with intellectual and developmental disabilities and their families.
 3. To develop, implement, and revise as necessary a state plan that meets the needs of persons with intellectual and developmental disabilities and their families.¹
 4. To coordinate and cooperate with agencies responsible for the provision of services to this population and to advise such agencies about the developmental disabilities program goals, objectives and priorities.

¹ Measure the purpose of the 5-year plan against the Principles in the bylaws.

ARTICLE III: MEMBERSHIP

- A. The Council shall be composed of twenty-six (26) members appointed by the Governor to serve, as prescribed by the laws and regulations authorizing the Council.
1. The membership of the Council shall be geographically representative of the state and reflect the diversity of the state with respect to race and ethnicity.
- B. The Council must maintain the following representation of individuals with intellectual and developmental disabilities:
- 15 Citizen Members comprised of:
1. Eight (8) individuals with developmental disabilities
 2. Seven (7) Parents/Guardians/Immediate Relatives of individuals with a developmental disability with a mentally impairing condition and cannot advocate for themselves.
 3. Members in this paragraph (B) shall not be employees of a State agency that receives funds or provides services with federal funds from the Developmental Disabilities Act, nor managing employees of any other entity that receives funds or provides services under the Act, nor persons with an ownership or control interest with respect to such an entity.
- C. The Council must include in its membership representatives of relevant state entities, including:²
1. The state agencies that administer funds under the Rehabilitation Act of 1973, Individuals with Disabilities Education Act, Older American Act and Titles V and XIX of the Social Security Act, and the state Developmental Disabilities agency. These representatives must have sufficient authority to engage in policy planning and implementation on behalf of their agency.
Agencies in the State of Florida that meet these requirements are:
 - i. Department of Education.
 - ii. Division of Vocational Rehabilitation (Rehabilitation Act of 1973).
 - iii. Agency for Persons with Disabilities (state Developmental Disabilities agency).
 - iv. Department of Education.
 - v. Bureau of Exceptional Education and Student Services (Individuals with Disabilities Education Act)
 - vi. ; Department of Elder Affairs (Older American Act);
 - vii. Department of Health, Children's Medical Services (Title V);
 - viii. Agency for Health Care Administration and Department of Children and Families (Title XIX of the Social Security Act).

² Official inclusion of DCF as member of the Council even if not prescribed in the DD Act.

2. The University Centers for Excellence in Developmental Disabilities Education, Research, and Service.
Universities in the State of Florida that meet these requirements are:
 - i. University of Miami, Mailman Center.
 - ii. University of South Florida, Florida Center for Inclusive Communities.
 3. The state protection and advocacy system.
The Florida state and protection organization in Florida that meets this requirement is:
 - i. Disability Rights Florida, Inc.
 4. One local and nongovernmental agency that provide services to individuals with intellectual and developmental disabilities.
 5. One nonprofit group concerned with services for individuals with intellectual and developmental disabilities.
- D. If the gubernatorial-appointed representative from a state agency or University Center of Excellence in Developmental Disabilities Education, Research, and Service or the state protection and advocacy system is the agency director, an appointed designee who can vote in his/her absence is permitted. Should the agency director wish to appoint a designee to act on his/her behalf, he/she must notify the Executive Director with the name and title of the designee.
- E. Membership on the Council shall be by appointment for a term as specified by the Governor.
1. A member may be appointed to a second successive term. (8 years total)
 2. Any member desiring to resign from the Council shall submit a resignation in writing to the Council Chair and the Executive Director of the Council who will forward a copy to the Governor.
 3. A vacancy created when a Council member resigns will not be counted toward quorum until the Governor appoints a member to fill the vacancy.
 4. If not otherwise removed by the Governor for cause or by resignation, members continue to serve until his/her successor is appointed by the Governor.
 5. The Council will submit recommendations to the Governor for reappointments and new appointments.
- F. The Executive Committee will review the attendance of Council members at least annually. Unless determined justified, the Executive Committee will determine the appropriate action for absences of twenty-five percent or more of regularly scheduled Council, committee, and task force meetings.

- G. If a member violates the Council Bylaws, Code of Ethics and Decorum policy, Conflict of Interest policy or takes other actions to the detriment of the Council and/or the mission of the Council, his/her membership will be reviewed by the Executive Committee at a regular or specially called Executive Committee meeting. The issue shall be placed on the agenda of the Executive Committee meeting by the Council Chair after at least ten (10) working days prior written notice is given to the Council member, assuring appropriate accommodations are made, if needed. The Executive Committee will determine the action to be taken, if any, up to and including recommending termination of the membership.

If the Executive Committee votes to recommend termination of membership for cause, a letter conveying this recommendation shall be forwarded to the Governor, which shall explain cause of action, unless the Council member shall, within fifteen (15) working days after the vote of the Executive Committee, write a written request to the Council Chair for a full hearing by the Council. If this request is made the matter shall be placed on the Council agenda and heard at the next regularly scheduled Council meeting or, at the option of the Council Chair, at any specially called Council meeting.

- H. No Council, committee or task force member shall provide any goods, services or representation to the Council for compensation during the term of the member's appointment.

I. Conflict of Interest

1. A conflict of interest exists when:

- a) a member has a personal or professional interest that influences the independence of his or her judgment to the point that it tends to lead to the disregard of his or her public duty or interest; and/or
- b) a member fails to adhere to the requirements set forth in the Conflict of Interest policy.

2. Council, Committee, and Task Force members shall avoid conflicts of interest or potential conflicts of interest in regard to Council activities.

3. Should a conflict of interest arise, a member must declare his/her conflict of interest and recuse him or herself from voting related to the issue immediately upon discovering the conflict. The Chair will have discretion to determine if a member with a conflict of interest will need to leave the room during the discussion.

If the issue is policy-related, the member may offer information on the issue but shall not advocate or attempt to influence the decision. The member will then leave the meeting for the balance of the discussion and voting on the issue.

If the issue is related to Council funding or any other non-policy-related issue, a member must leave the room and recuse him or herself from any discussion, deliberation, and/or vote regarding the matter.

- J. The members of the Council, its committees and its task forces serve without financial compensation, but they shall be entitled to approved travel or personal care expenses incurred in attending Council meetings and other pre-approved program Council related sponsored functions.
- K. The conduct of members of the Council shall be in accordance with the policy and procedures of the Developmental Disabilities Council, the Conflict of Interest policy, and the Code of Ethics and Decorum Policy for members of the Florida Developmental Disabilities Council, Inc., which have been duly adopted by the Council and are hereby incorporated into these Bylaws, by reference.

ARTICLE IV: OFFICERS

The officers of the Council are as follows: Chair, Vice Chair, and Treasurer. The officers are elected by vote of the majority of Council members. Officers will serve for a term of two (2) years. Officers may serve more than one term in an elected position.

- A. Duties of the Council Chair:
 - 1. To conduct meetings of the Council and meetings of the Executive Committee.
 - 2. With the Executive Committee, to determine the appointment and termination of task force and committee members as necessary.
 - 3. To ensure that the functions of the Council as described in the DD Act and other pertinent state and federal laws are carried out.³
 - 4. To promote the Council's continuous collaborative working relationship with agencies of state government in exercising their responsibilities to persons with intellectual and developmental disabilities.
 - 5. To serve as the official spokesperson for the Council
 - 6. To provide support and guidance to the Executive Director in interpreting and carrying out Council activities.
 - 7. To lead the Executive Committee in an evaluation of the Executive Director each year, including a competitive compensation package.
 - 8. To encourage active involvement and engagement of all Council members.
 - 9. The Council Chair appoints the Chair and members of the standing committees with input from the Executive Director.

³ https://www.fddc.org/wp-content/uploads/2022/01/dd_act_2000.pdf

B. Duties of the Vice Chair:

1. To carry out the duties of the Council Chair in the absence of the Council Chair and to assume the duties of the Council Chair, if that office is vacated, through the remainder of the term.
2. To assist the Council Chair in monitoring the activities of the Council committees, task forces, and other groups established by the Council.
3. To oversee revision and review of the Bylaws on at least a biennial basis.
4. To carry out other duties as delegated by the Council Chair.

C. Duties of the Treasurer:

1. To chair the Council's Finance Committee.
2. To develop and submit the annual operating budget in accordance with the upcoming year's federal allotment.
3. To review the Council's financial statements quarterly and report to the Council on a triannual basis.
4. To report to the Council the results and recommendations of the annual independent auditor's report.

D. Duties of the Secretary:

1. If so, define the position- spread the workload. For Council members to have leadership opportunity.

ARTICLE V: COMMITTEES

A. Standing Committees:

Standing committees of the Council shall be the:

- Executive Committee,
- Finance Committee,
- State Plan Committee,
- and the Public Policy Committee.

B. Executive Committee:

The Executive Committee shall be comprised of the:

- Council Chair,
- Vice-Chair,
- Treasurer,
- Two (2) at-large members who are appointed by the Council Chair
- Two (2) elected at-large members.

At-large members will serve for a term of two (2) years. At-large members may serve more than one term, and may serve more than one term consecutively in either an elected or appointed position.

The Executive Committee's duties shall be:

1. To serve in an overall advisory capacity to the Council in the formulation of policy.
 2. To take emergency action on behalf of the Council and to make decisions to maintain the course of business between Council meetings. Any such actions, whether in meetings or conference calls, shall be reported to the full Council for the purpose of vote, approval, or disapproval at the next Council meeting; provided, however, those actions impacting on third parties shall not be affected.
 3. To recommend to the Council the hiring and termination of the Executive Director in accordance with Council policy and procedures and to conduct, review, and approve the annual performance evaluation and remuneration of the Executive Director.
 4. To serve in an advisory capacity to the Executive Director on matters of personnel management and policy. This includes but is not limited to serving as a grievance and appeal body for Council employees, if requested by employees after internal procedures have been followed; developing or revising policies; and approving staffing, salary and benefit recommendations.
 5. To review Council membership recommendations and forward to the full Council and Governor.
 6. To guide Council member development activities.
 7. To serve as an advisory board for matters relating to conflicts of interest, including but not limited to making determinations of whether a conflict exists and what actions to take to address undisclosed conflicts.
 8. The Executive Committee shall function as a Nominating Committee to develop a slate of proposed officers.
- C. The Finance Committee reviews the financial status and monitors expenditures of the Council, reporting its findings to the Council at least three times each year. Furthermore, this committee shall periodically review the Council's fiscal regulations and policies and make recommendations to the Council accordingly. The Finance Committee is also responsible for contracting for an annual audit of the Council's financial status and reporting such status to the full Council. Additionally, the Finance Committee provides feedback to the State Plan Committee regarding the assessment of current contractual obligations and applications for continued funding.
- D. The State Plan Committee provides oversight to and ensures the development, implementation, and achievement of the Council's Five-Year State Plan. The responsibilities of the State Plan Committee are specified in the Council's policies.
- E. The State Plan Committee shall be a collective representation of the task forces as established under the State Plan and specified in the Council's policies.

- F. Public Policy Committee is responsible for monitoring the legislative process and approving any modifications to the Council's legislative positions and any additional legislative positions. In the absence of the Public Policy Committee, approval of Council legislative positions may be authorized by two or more of the following: Council Chair, Public Policy Committee Chair, and/or Executive Director.
- G. Committees and task forces shall be comprised of not less than three (3) Council members.
- H. Ad hoc Committees/Task Forces: Can be established by the Chair for specific issues, is time limited with reporting responsibility to the full the Council.

ARTICLE VI: ELECTIONS

- A. Elections shall be held as needed during the last meeting of the federal fiscal year and all elected and appointed members shall begin their terms of office on October 1. The nominating and voting procedures are outlined in the policies.
- B. Voting: If during voting there are an insufficient number of eligible candidates to fill a position, the Executive Committee, acting as the Nominating Committee, will, within 30 days, meet and prepare a slate of one or more nominees to be voted on.
- C. Special Elections: In the event an elected officer (other than the Council Chair) or an elected at-large member resigns or otherwise leaves the Council during his/her term, a special election will be held at the next scheduled full Council meeting.
- D. In the event an appointed at-large member resigns or otherwise leaves the Council during his/her term, the Chair may appoint an at-large member for the remainder of the term.

ARTICLE VII: MEETINGS

- A. The Council shall meet at least three (3) times a year. The Council may call additional meetings as it deems necessary.
- B. Special meetings may be called by the Council Chair. Special meetings may also be called by written application of five (5) members made to the Vice Chair who shall send notices to all members not less than ten (10) working days prior to the meeting stating the purpose(s) of the meeting.
- C. Members are expected to attend Council and assigned committee and/or task force meetings. They shall notify the Executive Director, in writing, as soon as reasonably possible of any absences. Due to the complexity of matters considered by the Council, attendance at meetings is crucial.
- D. A quorum for Council meetings and all standing committees shall be at least forty percent (40%) of the membership. A member must be present to count toward quorum. Once a quorum is established, actions, as applicable, shall be taken by a majority vote of those present.

- E. All meetings of the Council, its committees, and task forces must be noticed and open to the public.
- F. Robert's Rules of Order, most recent edition, shall be followed by the Council in all cases involving parliamentary procedure when such rules do not conflict with the provisions of these Bylaws. The rules may be suspended by a two-thirds (2/3) vote of the voting members present at any meeting of the Council or its committees.

ARTICLE VIII: INDEMNIFICATION

- A. Any person who was or is a party, or is threatened to be made a party, to any threatened, pending, action, suit, or proceeding, whether civil, criminal, administrative, or investigative, by reason that he or she is or was a member, officer, employee, or agent of the Council, or is or was serving at the request of the Council as a member, officer, employee, or agent of another corporation, partnership, joint venture, trust, or other enterprise, and the action is related to their service on behalf of the Council, shall be indemnified by the Council, against all expenses (including attorneys' fees), judgments, fines, and amounts paid in settlement actually and reasonably incurred by him or her in connection with such action, suit, or proceeding, including any appeal thereof. However, no indemnification shall be available to an individual should it be determined that the individual's actions were in bad faith or with malicious purpose or in a manner exhibiting a wanton and willful disregard of human rights, safety or property. The initial determination as to whether an individual's actions are subject to indemnification shall be made by the Executive Committee.
- B. There shall be a right of review of the determination of the Executive Committee as follows:
 - 1. A committee of three individuals shall be selected to review the determination of the Executive Committee as to whether a member, officer, employee or agent of the Council is entitled to indemnification under this Article.
 - 2. The committee shall consist of one individual selected by the Executive Director, one member selected by the Council and the third selected by those two individuals. In the event that an agreement cannot be reached by those two individuals, the Executive Director and the organization's Attorney will select the third individual.
 - 3. The committee shall review the circumstances of the civil, criminal, administrative, or investigative matter and determine whether the alleged actions are indemnifiable under these provisions.
- C. Upon being notified of the existence of a civil or criminal action, suit, or proceeding having been brought against a member, officer, employee, or agent of the Council, that individual shall immediately provide that information to the Executive Director. Expenses (including attorneys' fees) incurred in defending a civil or criminal action, suit, or proceeding shall be paid by the Council in advance of the final disposition of such action, suit, or proceeding upon notification of the existence of the action provided that the action is within the scope of this indemnification. Indemnification hereunder shall continue as to a person who has ceased to be a member, officer, employee, or agent and shall inure to the benefit of the heirs, executors, and

administrators of such person. The foregoing rights of indemnification shall not be deemed exclusive of any other rights to which any such person may otherwise be entitled apart from these Bylaws. To the extent that it is ultimately determined that the individual is not entitled to indemnification under these provisions, the Council may seek reimbursement of any expenses (including attorney's fees) previously paid.

- D. The Council may authorize the purchase and maintenance of insurance on behalf of any person who is or was a member, officer, employee, or agent of the Council, or is or was serving at the request of the Council as a member, officer, employee, or agent of another corporation, partnership, joint venture, trust, or other enterprise against any liability asserted against him or her and incurred by him or her in any such capacity or arising out of his or her status as such, whether or not the Council would have the power to indemnify him or her against such liability under the provisions of these Bylaws.

ARTICLE IX: BYLAWS AMENDMENTS

These Bylaws may be amended at any time by a two-thirds (2/3) vote of the membership of the Council present at a duly called meeting at which a quorum is present; provided, however, that the agenda of the meeting and new wording of the proposed changes are sent to every member at least ten (10) working days before the date of the meeting at which the amendments will be considered. Recommendations for amendment may be developed through any individual member, committee, or task force. The ten (10) working day notice may be waived upon three-quarters (3/4) approval of the total membership if they want to address the changes at the current meeting.

FLORIDA DEVELOPMENTAL DISABILITIES COUNCIL, INC.

FULL COUNCIL AGENDA

Wednesday May 14th

| | | |
|----------------------------|--|----------------------------------|
| 6:30 p.m.-7:30 p.m. | Pre-Council Meeting <i>Review of key items in Council book</i> <i>Ideas for Council Member Mentor Program</i> | <i>Facilitated by Chair Hall</i> |
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Thursday May 15th

DAY 1- FULL COUNCIL MEETING

| | | |
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| 9:30 a.m. | Introduction/Call to Order | <i>Eddie Hall, Chair</i> |
| | Adoption of the Agenda ** | <i>Eddie Hall, Chair</i> |
| 9:45 a.m. | Adoption of the January 2025 Minutes ** <i>(A) 01/31/25 minutes</i> | <i>Eddie Hall, Chair</i> |
| 9:45 a.m.-11:15 a.m. | State Agency/Sister Agency Reports | <i>Eddie Hall, Chair</i> |
| 11:15 a.m.-11:30 a.m. | Break | |
| 11:30 a.m.-11:45 a.m. | Chair/Vice Chair Report | <i>Eddie Hall, Chair</i> |
| 11:45 a.m.-12:00 p.m. | Executive Director Report | <i>Valerie Breen, Ex. Dir.</i> |
| 12:00 p.m. | Working Lunch | <i>Working Lunch</i> |
| 12:15 p.m.-1:15 p.m. | 2025 Legislative Outcomes Report | <i>Margaret Hooper, Dir.</i> <i>Sarah Goldman</i> |
| 1:15 p.m.-1:30 p.m. | Break | |
| 1:30 p.m.-2:45 p.m. | FDDC Key Projects/Outcomes | <i>Program Team</i> |
| 2:45 p.m.-3:00 p.m. | Break | |
| 3:00 p.m.-4:30 p.m. | Standing Committee Recommendations for Council Discussion and Vote** <i>State Plan</i> <i>Public Policy</i> <i>Finance</i> <i>Executive</i> | <i>Eddie Hall, Chair</i> <i>Jean Sherman, Chair</i> <i>Sarah Goldman, Chair</i> <i>Dennis Hart, Chair</i> <i>Eddie Hall, Chair</i> |
| 4:30 p.m. | Any New Business Public Comment | <i>Eddie Hall, Chair</i> <i>Eddie Hall, Chair</i> |
| 4:30 p.m. | Meeting Adjourned | <i>Eddie Hall, Chair</i> |

6:00 p.m.-7:00 p.m.

Mandatory Council Dinner

*Provided by FDDC
WellFlorida Opener*

Friday May 16th

DAY 2- FULL COUNCIL MEETING

8:30 a.m.

Introductions/Roll Call

Eddie Hall, Chair

8:45 a.m.-10:30 a.m.

Strategic Planning

WellFlorida Council, Inc.

10:30 a.m.-11:00 a.m.

Break- Check out of hotel

11:00 a.m.-1:30 p.m.

Strategic Planning

WellFlorida Council, Inc.

12:00 p.m.

Working Lunch

1:30 p.m.

Public Comment

Eddie Hall, Chair

1:30 p.m.

Next Council Meeting

Eddie Hall, Chair

1:30 p.m.

Meeting Adjourned

Eddie Hall, Chair

Florida Developmental Disabilities Council

**Full Council Meeting Minutes
January 29, 2025-January 31, 2025
In Person**

Council Members Present: Eddie Hall; Yolanda Herrera; Lauren Modawell; Enrique Escallon (via ZOOM); Michael Sayih; Charlotte Temple; Arizona Jenkins; Denise Anderson; Elly Hagen; Sarah Goldman; Danielle McGill; Carla Mercer; Kali Wilson; Susan Nipper (for Taylor Hatch); Caitlyn Clibbon (for Cherie Hall); Johana Valdivieso (for Kelly Rogers, Vocational Rehabilitation); Beth Boone.

Wednesday, January 29, 2025

Absent Council Members: Christina Cordova; Dennis Hart; Victoria Zepp; Kimberly Quinn; Patricia Bodiford; Kira Houge; Andrea Gary; Jean Sherman.

Guests: Danielle Towery, James Moore HR Solutions; Kerry Parsons, Nabor, Giblin and Nickerson; Amy Deaville, Information and Technical Assistance Center, Administration for Community Living.

Staff Present: Valerie Breen; Sue Kabot; Kristin Vandagriff; Margaret Hooper; Monica Moyer; Chris Reeve; Jennifer Chung; Sarah Macaluso.

Hall called the meeting to order at 3:30pm.

I. Adopt the Agenda

Action Taken: Hagen made a motion to adopt the agenda as presented. Herrera seconded. Motion passed unanimously.

Hall noted that after the last Council meeting, he felt that members could all benefit from hearing the same information on important topics that the Council should be educated or re-educated on. Hall noted he asked Executive Director Breen to arrange presentations on Harassment, Florida Sunshine and Ethics, and our roles and responsibilities under the DD Act.

II. Anti-Harassment Presentation

Hall welcomed Danielle Towery from James Moore, HR Solutions who has served as the subject matter expert to the Council in all matters related to labor laws and personnel, and Kerry Parsons, attorney from Nabor, Giblin and Nickerson. Nabor, Giblin and Nickerson have served as the legal Council on all matters related to our public responsibilities and federal guideline requirements.

Ms. Towery provided background on the importance of understanding harassment relating to the workplace. Employee rights and responsibilities were covered. The importance of protecting FDDC's reputation was also noted. Examples were provided regarding what to avoid. Harassment related to protected classes were also denoted. Questions were posed to attendees to fully grasp protected characteristics under the law.

Escallon asked if there is anything particular to be aware of for Florida. Towery denoted that everything noted in the Power Point presented applied to Florida.

III. Florida Sunshine/Ethics Presentation

Parsons provided a refresher on Sunshine law, public records, conflict of interest, and ethics. The purpose of the Sunshine law was discussed and defined as protecting the public from “closed door” meetings. It was denoted that elected and appointed boards must abide by this law for both formal and informal gatherings of 2+ members of the same board regarding an issue that may come before them related to that board. Open publicly noticed meetings were noted with limited options where it doesn’t apply. Application beyond in-person communication was discussed such as telephonic, texts, emails, social media, etc.

Compliance to Sunshine law was discussed, including: 1) Reasonable Notice of Meetings, 2) Open to the Public, and 3) Minutes. It was noted that open public meeting exceptions include: 1) union negotiation for collective bargaining, 2) certain oral presentations given by competitors in a competitive solicitation process, and 3) discussions on pending litigation. Sunshine law violations were noted to be serious and could risk voiding Council decisions or recommendations

Public records law was discussed relating to the public’s right to have access to official business of any public body. Unless statutorily exempt and/or confidential, all records are subject to disclosure and must be retained pursuant to state records retention schedule. It was discussed not to use one’s position to secure a special privilege and should not disclose or use information not available to the public gained through their role for personal benefit.

If a conflict of interest arises, members were directed to abstain from any discussion, deliberation and/or vote regarding the matter. FDDC code of ethics was discussed. FDDC bylaws were discussed relating to Council governance covering board functions of day-to-day work as well as membership, duties, committees, and minimum meeting requirements.

IV. Questions/Answers

Escallon provided an example of how compliance might be broken for members. Escallon asked about ways to remediate or cure a violation. Parsons noted that the matter should be taken back to the board in an open public meeting and vote again to ensure it is cured and the violation no longer exists. Escallon asked related to bylaws about policy and procedures- how board and staff work on policy and procedures and what role was recommended. Parsons said that the board can look at policies and bylaws and that amendments can be made if ever needed. With respect to day-to-day policies, those are usually developed by staff and brought to the board for discussion and consideration.

Hooper noted that legislators can make laws exempting them from Sunshine law. It was noted that no federal laws run counter to this exemption. The legislature exempted themselves from Sunshine due to having their own ethics policies in place. Hooper noted that an organization’s bylaws dictate how people conduct themselves and asked if in the absence of state and federal law, if bylaws are still needed. Parsons noted that if it is in the bylaws, it must be followed, and it may have narrower rules than state and federal laws. Hagen asked if Sunshine law applies after the voting. Parsons said it would not apply after the voting unless the issue is likely to come back before the board again, however, it is not recommended.

Hall adjourned the meeting at 5:21p.m.

Thursday, January 30, 2025

Council Members Present: Eddie Hall; Yolanda Herrera; Lauren Modawell; Enrique Escallon; Michael Sayih; Charlotte Temple; Arizona Jenkins; Denise Anderson; Elly Hagen; Sarah Goldman; Danielle McGill; Carla Mercer; Kali Wilson; Kimberly Quinn; Susan Nipper; Caitlyn Cliboon; Johana Valdivieso; Beth Boone; Kira Houge.

Council Members Absent: Christina Cordova; Patricia Bodiford; Andrea Gary; Victoria Zepp; Dennis Hart.

Guests: Amy Deaville, Administrator Federal standards and requirements Information & Technical Assistance Center, Administration on Community Living.

Staff Present: Valerie Breen; Sue Kabot; Kristin Vandagriff; Margaret Hooper; Monica Moye; Chris Reeve; Sarah Macaluso; Jennifer Chung.

Roll call was conducted, and quorum was established. Hall called the meeting to order at 1:38p.m.

Hall welcomed everyone and asked Breen to introduce FDDC's newest staff person, Jennifer Chung. Breen announced the retirement of Jan Pearce, Director of Programs, effective January 31, 2025, and that Chung, along with Kabot and Reeve, would be fulfilling the projects Pearce oversaw.

I. Adoption of the Agenda

Action Taken: Escallon made a motion to adopt the agenda as presented. Jenkins seconded. The motion passed unanimously.

II. Approval of the September 2024 Full Council meeting minutes.

Action Taken: Jenkins made a motion to adopt the minutes as presented. Mercer seconded. Motion passed unanimously.

III. The DD Act and Council Responsibilities Presentation

Hall welcomed Amy Deaville. Hall stated that this presentation was to provide a better understanding of the DD Act related to roles and responsibilities for Council members and staff.

Deaville covered the following in her Power Point presentation:

- Council connections organization chart was shown to provide a visual representation of the national and state connections. It was noted that Florida is unique being the first nonprofit DD Council. Florida also is its own DSA, providing it independence.
- Federal DD Council creation through the DD Act was discussed. It was noted that the DD Act was still active and does not have to be reauthorized. It has been reauthorized once. The law could exist without funding which would be considered an unfunded mandate.
- The core functions of advocacy, systems change, and capacity building efforts were denoted.
- Federal hierarchy was discussed explaining the layers that include: Administration on Community Living; Administration on Disability, Office of Intellectual and Developmental Disability (OIDD). DD Councils are assigned to both program and fiscal officers within OIDD. Annual performance reports

and state plans are sent to and approved by OIDD. This information is then used for reports to Congress.

- Detailed description of what the Council is, was provided.
- DD Council must follow Federal and State laws, regulations, policies, and procedures. The state plan, budget, and staff hiring/supervision were highlighted.
- Council member roles, responsibilities, and conduct were detailed. Governance and management were defined.
- Roles were discussed within the context of members, staff, and the Executive Director. The basic duties of a Council member were provided as a list, with each highlighted with associated context shared. Deciding on a mission, hiring/evaluating ED, creating a 5-year plan and subsequently implementing and monitoring plan progress, approve the budget and monitor the spending of money. Mentorship and developing well-informed Council members was highlighted with strategies that can be implemented. ITACC recommends an annual survey regarding how they could participate better. Ensuring ethical integrity was a highlighted role denoting a mandatory conflict-of-interest policy. Improving the DD Council's public standing was discussed as being an important component of being a Council member.
- The concept of "responsibility to the whole" was discussed as it relates to Council members.
- Important duties for Council members such as attending meetings, engaging actively, and abiding by by-laws/policies/procedures.
- The DD Act references relating to Council staff was covered. It was highlighted that the Executive Director reports to the Council and the Council supervises the Executive Director. Council staff report to the Executive Director and the Executive Director supervises staff. The Council member and staff partnership in accomplishing the work of the Council was denoted. It was highlighted that Council staff should not go to Council members and complain about coworkers. There is an internal grievance policy that is to be followed. Guidance was given for Council members should this type of scenario occur deferring the staff person to the FDDC employee grievance policy.
- A chart was shared regarding basic tasks denoting activities and the Council member role vs. the Executive Director role.
- A Beyond Tokenism presentation was delivered supporting board inclusion through meaningful engagement. Six elements of successful board inclusion were shared. Members were encouraged to self-reflect and consider areas for future improvement.
 - Authentic membership
 - Deliberate communication
 - Full participation
 - Meaningful ways to contribute
 - True influence
 - Mentors and supports
- The importance of the 6 elements was denoted through the sharing of both individual outcomes and organizational outcomes. Increased self-confidence and expanded leadership roles were denoted as individual outcomes. Adoption of person-centered practices, increased quality and satisfaction, and expanded views of capabilities of people with disabilities were denoted as organizational outcomes.
- The ITACC website was highlighted, denoting a yellow button for Council member resources.

Escallon asked for a recommendation regarding funding percentage of usage for different categories. Deaville stated that the DD Act denoted 70% of the funds must be state plan activities and 30% of the funds can be spent on administrative. Hall noted that many people with disabilities have been seen as a token. He noted never wanting to be seen as a token, but as a person with integrity who worked hard, and contributed equally.

IV. Adoption of Recommendations from Standing Committees

Chair Hall noted that FDDC is conducting business differently for 2025 to ensure that all Council members have an in-person vote on key issues that come out of FDDC standing committees. It was reported that each committee will bring their recommendations for Council vote at our full Council meeting. This allows Council members who are not on committees or unable to attend committees to have their input into Council business at the full Council meeting. The process was denoted to include each chair sharing their committees' recommendations for full Council discussion and vote. It was also reported that FDDC will no longer be adopting committee reports.

A. Public Policy Committee Recommendations

1. FDDC staff to pursue educating federal and state legislators on the benefits of Medicaid and develop tools for Council members.

Action Taken: Jenkins made a motion to adopt the recommendation. Temple seconded. Motion passed unanimously.

2. Staff to pursue Medicaid redetermination, presumptive eligibility for I/DD population.

Action Taken: Jenkins made a motion to adopt the recommendation. Modawell seconded. Motion passed unanimously.

3. Adoption of a new annual advocacy award called the Bobbie Lake Family Member Advocacy and Leadership Award.

Action Taken: Wilson made a motion to adopt the recommendation. Temple seconded. Motion passed unanimously.

B. State Plan Committee Recommendations

1. The Council was provided with a total of 13 recommendations related to all 13 FDDC projects regarding their necessity in the next 5-year Council state plan. Escallon asked if this would include funding. Kabot noted that funding will be discussed at the September 2025 meeting.

Action Taken: Goldman made a motion to approve and accept the recommendations related to all 13 projects. Jenkins seconded. The motion passed unanimously.

C. Finance Committee Recommendations

1. Adopt the Budget vs. Actual presented by Thomas Howell Ferguson

Action Taken: Temple made a motion to accept the recommendation. Clibbon seconded. Motion passed unanimously.

D. Executive Committee Recommendations

1. FDDC to hire a Tallahassee based law firm, GrayRobinson, and their ethics attorney, George Levesque, to review that structure of FDDC and its bylaws, articles of incorporation and statutory requirements as a federally required entity, in Florida statute as a non-profit.

Action Taken: Temple made a motion to accept the recommendation. Clibbon seconded. Motion passed unanimously.

2. Adopt the recommended employee recognition program with an amendment that the employee receives the net amount of the award in their paycheck.

Action Taken: Escallon made a motion to accept the recommendation. Wilson seconded. Discussion was offered. Clarification was asked about the net amount of the full award. Breen clarified that what was provided in the Council packet was the employee recognition program noted that the award would go in their paycheck and would be taxed. The executive committee asked for the employee to get the full award. The program would be modified to include the committee recommendation. Motion passed unanimously.

3. Hire an outside consultant to conduct a salary and benefits study for FDDC.

Action Taken: Hagen made a motion to approve the recommendation. Sherman seconded. Motion passed unanimously.

4. Establish a Council Bylaws Review Task Force.

Action Taken: Temple made a motion to accept the recommendation. Escallon seconded. Motion passed unanimously.

5. Establish a Council Applicant Review Task Force to review current applications through the FDDC website for Council member seats.

Action Taken: Goldman made a motion to accept the recommendation. Clibbo seconded. Motion passed unanimously.

V. Chair/Vice Chair Report

Hall noted that the coming year may be a challenging one and it will be critical to stick together as a team to move things forward. His noted that his focus will be self-advocates and self-advocacy as it is key to everything the Council is trying to accomplish.

Vice Chair Escallon noted that they have both met with the Executive Director weekly and offered if there are concerns or questions, they are there and can address concerns with the committee. It was noted that members have many perspectives, and it is important to hear from every member.

VI. Executive Director Report

Breen's Power Point presentation was titled "Pivot for the Future". She stated that 2025 is a new year and we must pay attention to what the future may hold for DD Councils and those with I/DD. She stated that it is critical that we pay attention to what others are saying and look for paths for others to hear us. Breen recommended that Council members watch the Florida Channel and become engaged in the Florida legislative process since legislative session was about to begin.

Breen spoke to the desire to develop and lead Floridians with disabilities and their families in a collective commitment to sustain the Council's efforts long-term. Breen stressed the importance of everyone working together for the best of the organization and those with I/DD.

VII. Public Comment/Meeting Adjourned

There was no public comment.

Hall adjourned the meeting at 4:43 p.m. The meeting was adjourned at 4:43 p.m.

Friday, January 31, 2025

Council Members Present: Eddie Hall; Yolanda Herrera; Lauren Modawell; Enrique Escallon; Michael Sayih; Charlotte Temple; Arizona Jenkins; Denise Anderson; Elly Hagen; Sarah Goldman; Danielle McGill; Carla Mercer; Kali Wilson; Kimberly Quinn; Susan Nipper; Caitlyn Clibbon; Johana Valdivieso and Myrna Diaz; Beth Boone; Kira Houge; Andrea Gary; Jean Sherman.

Council Members Absent: Christina Cordova; Dennis Hart; Victoria Zepp; Patricia Bodiford.

Staff Present: Valerie Breen; Sue Kabot; Kristin Vandagriff; Margaret Hooper; Monica Moye; Chris Reeve; Sarah Macaluso; Jennifer Chung.

Guests: Secretary Shevaunn Harris, Department of Children and Families; Bridget Royster, Acting Assistant Secretary, Department of Children and Families.

Roll call was conducted and quorum established.

Hall called the meeting to order at 9:05 a.m.

I. Adoption of the Agenda

Action Taken: Escallon made a motion to approve the agenda. Mercer seconded. Motion passed unanimously.

II. State & Sister Agency Reports

Special guests were introduced from Dept. of Children and Families, Secretary Harris along with Bridget Royster, Acting Assistant Secretary. Breen noted that she will pursue approval to add a Department of Children and Families seat to be represented on the FDDC Council.

Department of Children and Families (DCF)

Secretary Harris noted that there was a significant pause in Medicaid redetermination due to the pandemic. In late 2022, Congress instructed states to resume Medicaid redeterminations. There were 12 months to complete redeterminations, making 13 contacts each before disenrolling. The I/DD population was at the end of the redetermination process. She noted they were working with the Agency for Persons with Disabilities (APD) and sharing files to be able to alert support coordinators. Notification was made before termination to try to ensure individuals were not disenrolled unnecessarily. It was identified that agency changes regarding uploading forms, etc. needed change. Additional education was determined to be needed around the process.

It was noted that there were a lot of people on Supplemental Security Income (SSI) with changes in income that meant SSI was terminated and individuals didn't realize they needed to come to DCF to obtain their Medicaid as that was linked to their SSI. She reported that DCF desires to make the process smoother and lessen the amount of documentation that needs to be submitted. They have put a pause on disenrollments to assure that they can get the "fixes" and education completed.

Harris reported that the federal government provided additional information in November allowing tapping into 3rd party information. If DCF can validate that finances haven't changed, then they won't send a letter and will re-enroll the individual in Medicaid. Significant streamlining should be noted in February 2025. The SSI process will continue to be refined and DCF wants to continue to work with FDDC on stakeholder input processes. DCF wants to ensure that individuals maintain needed benefits and wants to do all they can to support process enhancement. They noted being open to input and wanting to collaborate to make the process better.

Hall opened the floor for questions.

- Goldman suggested having a checklist for those on SSI Medicaid and moving to DCF Medicaid. Challenges with classification in DCF system for those using Working Peoples Program were noted. Secretary Harris noted that they are working to get all financial information and a waiver indicator, working with Agency for Health Care Administration (AHCA). This will enable them to see that the individual is an iBudget client.
- Jenkins noted being one of the individuals who was discontinued. He thanked DCF staff for being present and listening to the input. He noted the issue regarding how long it takes to re-apply and get a case manager. The process was noted to be long, 30-40 days until a case manager can look over everything. He noted he had good caregivers who are flexible, but without payment caregivers will stop working. He noted that both the timeframe and delays were important to resolve. Harris noted that the new process should be more streamlined from a timeline perspective. There is a specialized team now that can look at these cases with an updated escalation process.
- McGill asked if there is a phone number for the specialized team for the escalation process. It was noted that she has received calls from families that the forms are hard to understand and do not know what needs to be collected. It was noted that a checklist would likely be very helpful. She noted that the process is a lot of work which is very hard for this population.
- Sherman shared her situation with her son as his legal guardian advocate. She stated that she never received a Medicaid notice. She also noted having dental insurance through Medicaid that was assigned to her son, but does not cover sedation dentistry, which he requires.

- Temple noted that she's talked to a lot of families with many different scenarios. She said that 50-60% of them don't know what benefits they have. They don't always know what they need to establish themselves with Medicaid for the waiver through a process outside of SSI. In the past the only way to get past the online system was to do a new application which then triggers a new eligibility process.
- Clibbon noted that she is hearing from clients that there are long wait times and being told they need to keep submitting additional information, prolonging the process. She reported that DCF workers are often not aware of programs like Working People with Disabilities program. Harris said they would be interested in collaborative training.
- Hooper noted appreciating DCF staff time and noted that the Council has taken a position to recommend an ex parte process to protect individuals against disenrollment while the process of submitting documentation was undertaken.
- Breen noted a comprehensive checklist seemed to be a common request from Council members. She offered, on behalf of the Council, to facilitate meetings to develop such a tool.

Agency for Persons with Disabilities (APD)

Nipper noted that regarding the Medicaid re-determination process, APD has been working collaboratively with agencies and passing on information that is needed. Lists have been going to DCF from APD on a regular basis. Information had been shared proactively for 12 months to provide waiver support coordinators with advanced information to allow for planning. Nipper reported that APD is working with DCF for waiver support coordinator training. This will cover MyAccess and the portal as well as the document submission process. APD is setting up dedicated teams to work with DCF partners to ensure questions and escalation issues are handled. APD will host virtual and in-person events to address issues as they come up.

Nipper reported that APD is excited to announce the online application portal. They have received hundreds of applications thus far. Individuals can now create an account, upload documents, and can view their status. There's a quick guide available to ensure that they know what is needed to begin the process.

The Florida Unique Abilities Program recognizes employers who hire people with disabilities. Toolkits for job seekers and job providers have been created.

APD has sent out interest letters for waiver enrollment and the managed care pilot. Nipper reported that 166 people were enrolled in the iBudget waiver; 306 in managed care pilot. Four hundred (400) regional events were hosted to support enrollment.

Nipper reported that the request for proposal (RFP) for dental closed on 1/29/2025 and they will be looking at submission eligibility and then review the proposals. Funding that APD received from the legislature can cover preventive and medically necessary dental care for APD clients until the program is online.

Agency for Health Care Administration (AHCA)

Quinn reported that the Statewide Medicaid Managed Care (SMMC) program is set to go live February 1, 2025. She reported that one of the changes was the opt out vs. opt in facet. iBudget enrollees are voluntary for managed care for regular medical. They can be in managed care plans or use the fee for service care system. If no action is taken, people are automatically enrolled into a managed care plan.

They can opt out at any time as it's a rolling open enrollment period. Some system updates have occurred and opt outs are processed daily. There are some benefits in managed care not available for fee for service such as: over the counter stipends, equine therapy, swimming lessons, etc. The opt out phone number was provided, 877-711-3662. If opting out isn't seen the next day via the AHCA portal, individuals were directed to call the helpline at: 877-254-1055. If anyone has issues, Quinn noted she'd be giving her card and offering to assist with the process. She said that ACHA's desire is that this would be a seamless process.

Hagen noted feedback from individuals and families regarding confusion on the letter received on opting out. She noted filling out the form and not hearing back. She called and was told to send a guardianship document. Nothing in the portal noted a change. She was then told she needed additional information. She checked again and noted they had not received it. It was suggested that individuals receive an email on what is required.

Escallon noted that this happened to him as well and it is a systematic problem. He noted having full guardianship of his son and that for those who are low incidence or need specialty medical care, working with specialists who are known to them may be critical.

Wilson noted that many families are likely to have issues starting February 1st. She stated that the impact of the re-determination resulting in the loss of Medicaid for the I/DD population combined with limited-service providers is a huge problem. When billing opportunities go away, smaller organizations really struggle. One smaller Arc hasn't been paid for months. Every change has a big impact.

Quinn noted that if anyone is moving into managed care, there are continuity of care requirements. The managed care plan must provide the same level of services. They have 90 days to get the individual with a commensurate provider. They can sometimes enroll the individual's provider in their network or find another provider that is in their network. There should be no disruption in services due to enrolling in managed care.

Breen requested that the communications departments in DCF, APD and AHCA include Breen in their e-mail correspondence so she can share with the Council pertinent information that would help inform the I/DD population.

Department of Elder Affairs (DOEA)

Houge noted that she did not have any significant updates and deferred her time to another speaker.

Department of Education- Vocational Rehabilitation (VR)

Diaz reported that supported employment included supporting those currently making subminimum wage. The percentage of individuals who exited Vocational Rehabilitation in competitive integrated employment was 41.4% which is an increase from past years. VR is continuing to build their capacity to deliver Discover and customized employment.

Valdivieso noted that VR has a new Director, Kelly Rogers. She stated VR's top priority is the speed of service delivery. The average time from application to receiving services has been reduced. They are working to further reduce this process timeframe. It was noted that 43 active Project SEARCH sites are supported and a few more will open in August 2025. Two hundred ninety-three (293) interns graduated from Project SEARCH with 161 having achieved competitive integrated employment.

Department of Education- BEES

No one available to provide a report.

Department of Health, Children Medical Services

Gary noted that she did not have any critical update and deferred her time to another speaker.

University of Miami- Mailman Center

Sherman noted the next Project SALT class starts in February 2025 and recognized Council member Michael Sayih as being a new participant in the February class. Sherman noted that the program is now being used in Nebraska. Sherman deferred the rest of her time to other speakers.

University of South Florida- Florida Center for Inclusive Communities

Boone thanked everyone who filled out the needs assessment. The needs assessment was finished, and the grant will be submitted soon.

Disability Rights Florida

Clibbon noted they are hiring their new Executive Director.

III. Public Comment

There was no public comment.

Hall adjourned the meeting at 10:31 a.m.

"To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities"

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2025 STANDING COMMITTEE MEMBERS

"To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities"

State Plan Committee

Jean Sherman, Chair

Staff, Sue Kabot

Beth Boone

Sarah Goldman

Elly Hagen

Dennis Hart

Yolanda Herrera

Danielle McGill

Carla Mercer

Kali Wilson

Executive Committee

Eddie Hall, Chair

Staff, Valerie Breen

Enrique Escallon, Vice Chair

Dennis Hart, Treasurer

Sarah Goldman, At-Large (Elected)

Elly Hagen, At-Large (Elected)

Yolanda Herrera, At-Large (Appointed)

Arizona Jenkins, At-Large (Appointed)

Public Policy Committee

Sarah Goldman, Chair

Staff, Margaret Hooper

Caitlyn Clibbon

Enrique Escallon

Elly Hagen

Eddie Hall

Yolanda Herrera

Arizona Jenkins

Danielle McGill

Carla Mercer

Lauren Modawell

Kali Wilson

Finance Committee

Dennis Hart, Chair

Staff, Monica Moya

Caitlyn Clibbon

Enrique Escallon

Andrea Gary

Sarah Goldman

Charlotte Temple

Kali Wilson



2025 TASK FORCE MEMBERS

"To advocate and promote meaningful participation in all aspects of life for Floridians with developmental disabilities"

Access to Services

Elly Hagen, Chair

Beth Boone, Co-Chair

Staff, Chris Reeve

Denise Anderson

Caitlyn Clibbon

Elly Hagen

Dennis Hart

Carla Mercer

Charlotte Temple

Kali Wilson

Victoria Zepp

Resource Members

Siddiqua Alleyne

Danny Armstrong

Jordan Chastain

Home & Community Based Services (HCBS)

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Denise Anderson

Tina Cordova

Andrea Gary

Arizona Jenkins

Susan Nipper

Jean Sherman

Self-Advocacy Leadership

Danielle McGill, Chair

Sarah Goldman, Co-Chair

Staff, Kristin Vandagriff

Mirna Diaz

Enrique Escallon

Eddie Hall

Yolanda Herrera

Lauren Modawell

Aging Caregivers

Yolanda Herrera, Chair

Carla Mercer, Co-Chair

Staff, Chris Reeve

Ann Dalton/ Kimberly Quinn

Elly Hagen

Kira Houge

Arizona Jenkins

Danielle McGill

Lauren Modawell

Susan Nipper

Michael Sayih

Jean Sherman

Victoria Zepp

Resource Members

Darrell Drummond

Damian P. Gregory

Dèan Gregory-Stewart

Mary Jo McKay

Managed Care- AD HOC

Sarah Goldman, Chair

Staff, Valerie Breen

Caitlyn Clibbon

Elly Hagen

Dennis Hart

Yolanda Herrera

Susan Nipper

Kimberly Quinn

Charlotte Temple

Victoria Zepp

Resource Members

Kevin Johnson

Laura Minutello

Broad Systems Change/Emerging Issues- AD HOC

2025 Meeting Schedule & Locations

FDDC Council Meeting

January 29-31, 2025
Florida Hotel & Conference Center
Orlando, FL

FDDC Council Meeting

May 14-16, 2025
Florida Hotel & Conference Center
Orlando, FL

FDDC Council Meeting

September 17-19, 2025
Florida Hotel & Conference Center
Orlando, FL