



Assistive Technology Advisory Council, Qtr. 3 Meeting

Minutes

June 22nd, 2023

9:30am-3:00pm

1. Opening

Mr. Brian Nerland called the meeting to order at 9:30 am. A roll call was conducted, and a quorum was established.

Members Present: Ms. Janet Good, Mr. Brian Nerland, Mr. Enrique Escallon, Mr. TJ Moon, Mr. Brandon Palermo, Ms. Lesa Kretschmer, Ms. Kailey Medlock, Dr. Betsy Burgos, Mr. Dan McGrew, Ms. Kristi Warren, Ms. Angel Perez, Ms. Mary Jarrett, Ms. Adriann Keve

Staff Present: Ms. Hannah Brock, Mr. Eric Reed

2. Approval of Agenda

No comments were made. Mr. Brandon Palermo motioned to approve the agenda. Mr. TJ Moon seconded the motion. The agenda was approved by acclamation as presented without any objections.

3. Approval of Minutes

No comments were made. Mr. Kailey Medlock motioned to approve the March 2023 Quarter 2 ATAC meeting minutes. Mr. Dan McGrew seconded the motion. March 2023 Quarter 2 ATAC meeting minutes were approved by acclamation without any objections.

4. ATAC Manual Changes | Eric Reed

Mr. Eric Reed states there are no changes to the ATAC manual. There are a few additions. The Self-evaluations have been added to the manual as well as the process for elections and when they will occur.

Mr. Palermo made a motion to approve the additions to the manual. Ms. Medlock seconded the motion. The ATAC manual additions are approved by acclamation without objection.



5. Chair Report (Executive Committee Report) | Brian Nerland

Mr. Brian Nerland welcomes and congratulates Mr. Eric Reed in his new role as FAAST executive director. He states that Mr. Reed will be sending out officer ballots after July 4th. Mr. Nerland also welcomed Ms. Adriann Keve to the ATAC. She is the new Division of Blind Services representative. Mr. Nerland asked Mr. Reed to collect short biographies of each ATAC member. They will be used internally for each member to get to know each other. Ms. Kailey Medlock was reinstated as Treasurer as of June 6th, 2023.

6. Executive Director's Report | Eric Reed

Mr. Eric Reed presented the Executive Directors report. The Governor has approved our budget. FAAST will be putting together legislative priorities to focus on continuing the funding. The Annual Family café was a success. 13,000 people participated and FAAST connected with a lot of new clients.

Mr. Reed reviews his 100-day plan.

Ms. Kailey Medlock asked for the Board information to be updated on the website. All deliverables for VR were achieved.

FAAST starts a new contract with VR next Fiscal year. The centers have asked that we advocate for yearly deliverables instead of quarterly. We have a meeting with VR in July.

Mr. Reed reviewed the tracking document for the 2020 strategic plan. We are on track to complete the strategic plan.

7. Treasurer's Report | Kailey Medlock

Ms. Kailey Medlock gave a presentation of the financials. Ms. Medlock the presentation is how she will be presenting the financials from now on and the P&L will be presented in quarters.



Mr. Dan McGrew motioned to accept the financial statements and Ms. Kristi Warren seconded the motion. The Financial statements are approved by acclamation without objection. Ms. Medlock stated that FAAST has received the 2022 financial audit on June 22nd, 2023. Mr. Reed stated he will be sending it out after today's meeting for everyone to review and the executive committee will vote to approve it at their next meeting. All ATAC members are encouraged to join that meeting if they have any feedback or concerns with the audit. Mr. Reed stated that the audit is clean with no findings.

8. ATAC Reappointments | Eric Reed

Mr. Reed presents the current ATAC roster. The ATAC needs another category 1 to be in compliance with the statute. He encouraged members to reach out to anyone they know that would fit the category.

Two members are eligible for their second term and have expressed their interest to serve this term. Mr. Enrique Escallon and Mr. Thomas Moon were presented for approval of a second term. Mr. Palermo motioned to approve and Ms. Jarrett seconded. The motion was approved with no dissent. Mr. Reed will forward the two applications to Director McNeal at Vocational Rehabilitation.

9. Committee Reports

Mr. Enrique Escallon presented the public policy and advocacy committee report. Sen. Pizzo and Sen. Collins submitted the same bill for FAAST by mistake. So, Sen. Pizzo withdrew theirs. Sen. Collins was nominated to the PPAC committee to be FAAST 2023 Legislator of the year.

Mr. Escallon made a motion to award Sen. Collins the legislator of the year award. Ms. Warren seconded the motion. Sen. Collins will receive the legislator of the year.

Mr. Eric Reed stated the Interagency did not meet this quarter. The committee does not have a chair and there is no report available.

Mr. Brandon Palermo presented the NHLP report. The NHLP program is on track.



Mr. Brian Nerland presented the Technology Awareness committee report. Mr. Reed reviewed the FAAST events list.

Ms. Lesa Kretschmer presented the service delivery committee report.

10. State Agency Representatives Report

Ms. Kristi Warren presented the CIL report.

Mr. Eric Reed presented the Vocational Rehabilitation report. He stated that FAAST has a new contract manager.

Ms. Adriann Keve presented the Division of Blind services report.

Ms. Janet Good gave a brief update on the Department of Education's activities Mr.

Dan McGrew presented the CareerSource Florida report.

11. Strategic Plan Discussion | Eric Reed

Mr. Reed leads the discussion about developing a new strategic plan. Mr. Nerland adds that the previous facilitator through UCF is not available. He recommends that we shorten the strategic plan. Ms. Mary Jarrett recommends sending out an RFP for a strategic plan facilitator. The council agrees that a 2-year plan would suffice. Ms. Jarrett moved that Mr. Reed and the executive committee compare costs and bring 2 or 3 Strategic plan finalists to the council. Mr. Palermo seconded the motion. The presentation is to be given at the September 7th meeting

12. Closing

The next meeting is scheduled for Thursday, September 7th, 2023, 9:30am-5:00pm in Tallahassee.

No public comment was made.

The meeting was adjourned at 11:40 am ET.



Executive Director's Report

September 7, 2023

Quarterly Updates and Activities

The annual budget and year-end budget reconciliation have been main priorities while continuing to work through the 100-day plan, with the tedious tasks from the plan behind us and now ready to move into the mission related priorities.

VR and Contract Updates

FAAST's VR contract manager has changed once again but as was the case with the last manager, we have had good communication with our contract manager as well as the Deputy Director of the division. The FAAST/VR contract expires on 9/30/2023 and the updated contract with changes to how FAAST would be charged financial consequences is under review with VR now.

RDC contract modifications will also need to be executed for the new fiscal year so we are hopeful all of this will take place within the next three weeks.

Internal Staffing

The hiring process will begin next week to bring a new bookkeeper to FAAST as Megan transitions to the financial loan program. At the end of the quarter, it is hopeful that a new statewide AT specialist will be hired to assist the demonstration centers with AT training needs as well as be pivotal in building relationships with different organizations and partners within the local RDC communities.



Upcoming Travel

RDC and ReUse partner site visits will continue through the month and it is expected that by 9/30 I will have had the opportunity to visit all of our contract partners in person

FAAST will have a seat on the new Florida Agribility advisory council with the first meeting in Gainesville in October.

FAAST Public Awareness

FAAST participated in multiple exhibit opportunities across the state with representation by both FAAST staff and RDC staff. The review of the years public awareness activities are on the following page.



Upcoming Events (2)

The 18th annual Florida Exceptional Employer Awards Expo and Recognition Ceremony

- 10/23/2023 in Tallahassee, FL
- Hosted by APD
- Exhibiting- Tim McCann, & Marquesas Blimes

Florida Occupational Therapy Association Conference 2023

- 11/4-5/2023 in Clearwater, FL
- Hosted by FOTA
- Exhibiting- Tim McCann, TBD

Potential Events (3)

Florida Children's Week

- January 14-19 2024 in Tallahassee FL
- Hosted by The Children's Forum
- Exhibiting (1 booth): Marquesas Blimes & Tim McCann

Leon County Government Benefits and Well-Being Fair

- ? 2024 in Tallahassee, FL
- Hosted by Leon County
- Exhibiting- Marquesas Blimes, TBD



Past Events (21)

Florida Self Advocacy Conference

- 8/18-20/2023 in Orlando, FL
- Hosted by Florida SAND
- Exhibiting- Tim McCann, TBD

Florida Conference on Aging 2023

- 8/7-9/2023 in Orlando, FL
- Hosted by Florida Council on Aging
- Presentation and Exhibiting- Tim McCann & Eric Reed

Florida Academy of Audiology Annual Convention

- 8/2-4/2023 in Orlando, FL
- Hosted by Florida Academy of Audiology
- Exhibiting- Eric Reed

The 15th International CHARGE Syndrome Conference

- 7/20-23/2023 in Orlando, FL
- Hosted by The Charge Syndrome Foundation
- Exhibiting- Eric Reed / ARDC

2023 FLASHA Annual Convention

- 7/13-16/2023 in Orlando, FL
- Hosted by Florida Association of Speech-Language Pathologists & Audiologists



Exhibiting- Eric Reed, & Tim McCann

The 25th Annual Family Café

- 6/09-11/2023 in Orlando, FL
- Hosted by The Family Café
- Exhibiting (2 booths): Hannah Brock, Eric Reed, Marquesas Blimes, and Tim McCann
- Two presentations

Florida Prosperity Partnership Annual Training Conference

- 5/31-6/02/2023 in Orlando FL
- Hosted by Florida Prosperity Partnership
- Attending / Presenting: Eric Reed

Make 'm Smile

- 5/6/2023 in Orlando, FL
- Hosted by Nathaniel's Hope
- Exhibiting: ARDC

Florida Children's Week

- 3/28/2023 in Tallahassee FL
- Hosted by The Children's Forum
- Exhibiting (1 booth): Marquesas Blimes & Tim McCann

SportsAbility Expo

- 3/23-25/2023 in Tallahassee, FL
- Hosted by SportsAbility Alliance
- Exhibiting: Marquesas Blimes and Tim McCann

Developmental Disability Awareness Day 2023

- 3/14/2023 in FL Capitol, 2nd FL Rotunda
- Hosted by the Florida Developmental Disabilities Council



- Exhibiting: Tim McCann & Marquesas Blimes

Florida DeafBlind Association State Meeting 2023

- 2/25/2023 in Gainesville, FL
- Hosted by the Florida DeafBlind Association
- Exhibiting: Tim McCann

FAVI Advisory Board Meeting

- 12/09/2022 held virtually.
- Hosted by the Florida and Virgin Islands DeafBlind Collaborative
- Presenting: FAAST Services and Locations by Whitney Doyle

Audio ABLE Podcast

- 11/2022 Virtual podcast recording
- Hosted by ABLE United
- Presenting: FAAST Services by Whitney Doyle
- Live December 2022

Florida Occupational Therapy Association 2022 Annual Conference

- 11/5-11/6/2022 in Clearwater, Florida
- Hosted by FOTA
- Exhibiting: Whitney Doyle and Tim McCann

The O&P Check-in: An SPS Podcast

- 11/2022 Virtual podcast recording
- Hosted by SPS
- Presenting: AT Act and FAAST Services by Whitney Doyle
- Live December 2022

Florida Rehabilitation Council Meeting

- 10/25/2022 in Tampa (FAAST presenting virtually)
- Hosted by the Florida Rehabilitation Council
- Presenting: FAAST Information and Services by Whitney Doyle



Southeast Regional Institute on Deafness (SERID) Annual Conference

- 10/13-10/16/2022 in Altamonte Springs, Florida
- Hosted by the SERID
- Exhibiting: Tim McCann and NERDC staff

The 17th Annual Exceptional Employer Awards Expo

- 10/24/2022 in Tallahassee, FL
- Hosted by the Agency for Persons with Disabilities
- Exhibiting: Whitney Doyle, Tim McCann, and Marquesas Blimes

Florida Partners in Policy Making

- 10/22/2022 in Orlando (FAAST presenting virtually)
- Hosted by the Florida Developmental Disabilities Council
- Presenting: What is FAAST by Marquesas Blimes

Rotary Club of Tallahassee Northside

- 10/06/2022 in Tallahassee, FL
- Hosted by Rotary Club of Tallahassee Northside
- Presenting: FAAST Information and Services by Whitney Doyle



September 7, 2023

To: ATAC

From: Eric Reed

The following is a summary of the actions and activities related to the 100-day plan presented during the Executive Director Interview Process.

100 Day Plan

Follow-Up Report

September 7, 2023

Calendar Day 94

Business Day 65

Completed

In process – updates in red

Sincerely,

Eric Reed

Executive Director



FAAST Team/Staffing

- ✓ Initial Staff Meetings:
 - Review the 100-day plan with staff. Set early expectations and provide an outline of the gameplan for accomplishing goals.
- ✓ Conduct One on One meetings:
 - Gather information from staff on their passions and motivators, challenges of their role, and areas of mastery of their role.
 - Ask for an explanation of the role in their own words: time, efforts, primary/most important tasks, and duties.
- ✓ Begin transitioning some of the financial loan program tasks and responsibilities to staff as appropriate.
- ✓ Review job descriptions: compare to information gathered from one-on-ones.
- ✓ Conduct shadow sessions: 2-hour observations during a routine busy task day.
 - Does employee have proper tools in place?
 - Are systems efficient for work to be done?
 - Does team member utilize systems for efficiency?
 - Internal and external customer interaction observations.
- ✓ Determine staffing needs created from promotion to executive director and begin the recruiting process for new hire needs.
- ✓ Review employee benefits and determine if any changes are needed to be competitive in recruiting.
 - ✓ One on One meetings with all team members: Provide feedback from observation sessions; Seek feedback on the first 40 days; Discuss prior evaluation methods used to help determine a format to use moving forward; Uncover any development goals and discuss training and professional development opportunities.
- ✓ SWOT Team Meeting:
 - Brainstorming session to create a staff view of Strengths, Weaknesses, Opportunities and Threats of the organization.
- Determine and create staff evaluation/review method and schedule:
 - Use input as to what is a motivator for team members and what is a realistic/attainable schedule for impactful feedback. **In process following final one-on-one's and SWOT**
- Conduct initial performance evaluations and set evaluation intervals moving forward. **Completion target of 9/22**
- Review job descriptions with a focus on any needed changes based on the new strategic plan. **In process with strategic planning**
- New staff is hired as needed for program growth areas and financial loan program. **New bookkeeper hired with target of 9/30**
- End of 100-days team retreat: **target of 2nd-3rd week of October following onboarding of new staff**
 - Review strategic plan progress; SWOT follow-up; Team Building



Organizational Operations

- ✓ Update the contact information for banking and payment sites.
- ✓ Begin changes to signature cards for all bank accounts.
- ✓ Make necessary changes to payroll and the allocation formulas.
- ✓ Inform contacts at ACL, AT3, ATAP, Neilsen Foundation, VR, and Step-Up* of the leadership change.
- ✓ Inform necessary vendors, banks, and insurance companies of the leadership change.
- ✓ Make updates as necessary to the website and voicemail system.
- ✓ Become proficient with the Accounting Manual.
- ✓ Read and become familiar with state and federal accounting guidelines.
- ✓ Review all manuals for any needed updates due to the leadership change or other updates deemed necessary.
- ✓ Review, study and gain a full understanding of each line item of the budget.
- ✓ Meeting with the FAAST accountant:
 - Discuss processes and procedures.
 - Find areas that could improve internal efficiencies.
- ✓ Meeting with payroll provider to ensure full understanding of the system.
- ✓ Meeting with VR leadership to provide updates on FAAST.
- Meeting with VR accounting department :
 - Gain a full understanding of the funding process from federal funds receipt by VR to FAAST receiving funding. **With continued VR staffing turnover, this has not been requested.**
- ✓ Review all operational contracts, leases, and vendor relationships; address any potential beneficial changes or expiring agreements.
- ✓ Prepare any necessary budget amendments resulting from salary changes and proposed new hires.
- ✓ Computer and equipment assessment:
 - Are any upgrades necessary within the FAAST office?
 - Does everyone have what they need to be efficient and productive?
- Budget analysis for year end reconciliation. **Ongoing through fiscal year end**
- ✓ Analyze operational expenses for any known or potential cost changes for 2023-2024 budget.
- ✓ Budget finalized for presentation at the 4th quarter ATAC meeting.
- Review and make changes to office space layout and usage to maximize efficient use of space for AT, new employees, and meeting spaces. **Changes being made to accommodate new staffing positions and program changes**



Executing the Mission

- ✓ Website and social media announcement made of leadership change.
- ✓ Write a letter to key stakeholders about leadership change.
- ✓ Send email message to all contract partners and RDC leadership.
- ✓ Letters to key legislators announcing leadership change and thanking them for their continued support of FFAST.
- ✓ Meet with ATAC chair/executive committee to outline goals and expectations from 100-day plan.
- ✓ Review current strategic plan, ensure all activity is in place for successful completion by year end.
- ✓ Strategic Plan Discuss development of new Strategic Plan with Executive Committee and have ATAC discussion during the 3rd quarter meeting.
- ✓ Collaboration Focus: Create surveys to gather data on the knowledge of FFAST, strengths of FFAST, how FFAST can be a better partner, and how are we viewed as a source for AT for their clients. Surveys will be sent to: Current and Past Contract Partners; Current and Past Stakeholders; New organizations that FFAST has not partnered with
- ✓ ATAC recruiting efforts will begin at Family Café and through social media.
- ✓ Begin in person visits to RDC's and Reuse partner locations.
- ✓ Collaboration survey results gathered and disseminated.
 - ✓ **Sending survey to non-respondents for 2nd attempt**
- ✓ The 2023-2024 draft budget is created.
- ✓ The method for the creation of the new Strategic Plan is determined
- ✓ Legislative Priorities for 2023-2024 are discussed and outlined.
- ✓ Marketing focus and social media campaigns are reviewed: Seek a focus more related to FFAST mission, FFAST success stories and AT highlights.
 - Sunshine Training Ensure annual training is complete. **By 9/30**
 - Strategic Plan ATAC meeting(s) take place to develop and finalize the strategic plan. **Will follow the plan put in place**
- ✓ ATAC appointment requests for new members approved and sent to VR
 - Monthly FFAST blog posts (staff, RDC, guest posts) begin. **Will begin in new fiscal year**
 - Consult with AT3 regarding full accessibility of webinars and other aspects of marketing. **By 9/30 or as determined if included in strategic planning**
 - Key AT stakeholder meeting hosted (zoom). An opportunity to have all organizations that provide assistive technology resources to clients to meet for collaboration, discussion and planning for ways to all work more cohesively. **Will be scheduled with at least four weeks lead time – target is 3rd week of October**
- ✓ RDC and Reuse partner visits completed. **On track to be completed by 9/30**
- ✓ 100-day plan summary presented to the ATAC at 4th quarter meeting.



Memorandum

TO: Assistive Technology Advisory Council

FROM: Eric Reed, Executive Director

Cc: FAAST Staff

DATE: September 7, 2023

RE: FY23 QTR 2 Strategic Plan 2020 Report

Status Key

Needs Attention	Any item that is not meeting milestones to be accomplished by target date
On Target	Any item that is not yet completed but is meeting milestones to be accomplished by target date
Completed	Any item that has been completed by target date

Strategic Issue 1

How can FAAST raise public awareness of the organization and its programs, benefits, service areas, and successes?

Goal: Increase awareness of FAAST.	STATUS
Objective 1: By December 30, 2020, appeal to the public to increase awareness to taxpayers, legislators, and the public through testimonials.	Completed



Objective 2: By September 30, 2022, increase awareness of FAAST to partner organizations and businesses.	Completed
Objective 3: By September 30, 2023, have a statewide presence as the primary resource for Assistive Technology.	On Target
Objective 4: By December 31, 2021, update marketing materials for consumers to better understand FAAST services and what to expect.	Completed

Note: Creation of marketing materials / digital marketing flyers for different FAAST services are in process through the TAC and on target.

Strategic Issue 2

How can FAAST expand its capacity to reach all Floridians while maintaining a quality and equitable level of service?

Goal: FAAST serves all Floridians through a quality and equitable level of service.	STATUS
Objective 1: By September 30, 2021, FAAST will research and establish an updated service delivery model for Regional Demonstration Centers.	Completed
Objective 2: By September 30, 2022, FAAST will create, develop, and establish an online Training Resource page on the FAAST website.	On Target
Objective 3: By September 30, 2021, FAAST will create more collaboration amongst RDCs and RRCs.	Completed
Objective 4: By September 30, 2022, evaluate and adjust AT List.	Completed



Objective 5: By September 30, 2022, FAAST will implement the update service delivery model for RDCs.	Completed
Objective 6: By September 30, 2021, September 30, 2022, and September 30, 2023, create annual legislative priorities to implement within the strategic plan.	Completed
Objective 7: By September 30, 2023, FAAST will achieve an equitable service delivery model.	Completed
Objective 8: By September 30, 2023, with support from VR and DOE, the New Horizon Loan Program will be a separate nonprofit for the purpose of a Community Development Financial Institution.	Removed from plan – FAAST does not have VR support to continue
Objective 9: By September 30, 2022, FAAST will research and establish an updated service delivery model for Regional ReUse Centers.	Completed
Objective 10: By September 30, 2023, FAAST will implement the updated service delivery model for RRCs.	Completed

Note: Issue 2, Objective 2 is being worked on by website contractor and staff to add links to various online training pages, links to vendors help sites, FAAST youtube and others.

Objective 8 has been determined to not be a viable VR and DOE are not in support of the separation at this time. Conversations will continue over time as appropriate with VR leadership but the timeline indicated in the strategic plan will not be met.



Strategic Issue 3

How can FAAST address structural and operational weaknesses to improve governance, streamline operations, and pursue innovation?

Goal: FAAST to have up to date, appropriate, and responsible organizational structure and operations.	STATUS
Objective 1: By March 31, 2021, FAAST procedural and employee manuals will be updated (i.e., accounting, personnel, NHLP, SDLP, brand, marketing, board, inventory, RDC & RRC).	Completed
Objective 2: By March 31, 2021, the FAAST inventory system will be up to date, and an annual inventory will be completed.	Completed
Objective 3: By March 31, 2021, the FAAST board and ATAC will be one body and the Public Policy and Advocacy and Interagency Committee to be separated into two committees as reflected in statute 413.407.	Completed
Objective 4: By September 30, 2023, FAAST will continue to ensure up to date, appropriate, and responsible organizational structure and operations.	Completed

Florida Alliance for Assistive Services and Technology, Inc.

A/R Aging Summary

As of July 31, 2023

	CURRENT	1 - 30	31 - 60	61 - 90	91 AND OVER	TOTAL
Adjustment AR					0.00	\$0.00
Ann Molloy					79.95	\$79.95
Christy Mandin					399.00	\$399.00
Crystal Marlowe					369.95	\$369.95
Danny Mathews					849.99	\$849.99
Deborah Fredricks					89.00	\$89.00
Greg Mirabel					399.00	\$399.00
Hannah Alderman					20.00	\$20.00
Harvey Shuman (Barrower)					788.00	\$788.00
Jaclyn Peterson Bracco					479.00	\$479.00
Jeanneth Mora					329.00	\$329.00
Kirby Dickinson					29.00	\$29.00
Leonard Wieckowski					329.00	\$329.00
M. Lambert					1,399.19	\$1,399.19
Michael Marshall					399.00	\$399.00
Michelle Swencki					21.75	\$21.75
Natalia Woodson					153.00	\$153.00
Rosaangela Rubera					122.00	\$122.00
Salvatore Negrón					299.00	\$299.00
Shannon Thomas					399.00	\$399.00
State of Florida/DOE		417,072.75				\$417,072.75
Suheily Delgado					499.00	\$499.00
Teona Haugabook					369.00	\$369.00
Teryn Breardell Thompson					265.00	\$265.00
Tony Nguyen					399.00	\$399.00
University of Miami-FAAST		17,655.85	22,530.12	3,766.26		\$43,952.23
Vanessa Baztan					540.95	\$540.95
TOTAL	\$0.00	\$434,728.60	\$22,530.12	\$3,766.26	\$9,026.78	\$470,051.76

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet As of July 31, 2023

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
1000 Cash - Unrestricted	
1012 First Fed 4192 - FFAST Operating	68,263.33
1025 Capital City - Board Designated Operating Reserve	31,936.00
Total 1000 Cash - Unrestricted	100,199.33
1001 Cash - Restricted	
1047 First Fed 7286 - NHLP Operating	17,350.26
1048 First Fed 7294 - TW-DL	56,248.67
1049 First Fed 7302 - AFP-DL	104,277.10
1053 First Fed 7310 - Reserve Acct	132,275.49
1055 First Fed 4184 - CBA	2,005.00
Total 1001 Cash - Restricted	312,156.52
Suspense	11,833.23
Total Bank Accounts	\$424,189.08
Accounts Receivable	
1100 Accounts Receivable - Unrestr.	470,051.76
Total Accounts Receivable	\$470,051.76
Other Current Assets	
1120 Interfund	0.00
1200 Prepaid expense - Unrestric.	20,431.00
12000 Undeposited Funds	530.01
7055 AFP Direct Loans	507,668.48
7056 TW Direct Loans	141,198.02
7056.5 Credit Builders Alliance Loan	0.00
7061 Credit Builder Loan	0.00
Allowance for Doubtful Accounts	5,750.23
Fraud	16,650.10
Total Other Current Assets	\$692,227.84
Total Current Assets	\$1,586,468.68
Fixed Assets	
1500 Furniture & Fixtures	176,427.36
1550 Accumulated Depreciation	-119,806.00
1555 Accumulated Amortization	-54,000.00
Total Fixed Assets	\$2,621.36
Other Assets	
1600 TD Ameritrade	
1605 AFP	
1610 TD Ameritrade AFP	1,333,669.88
1611 AFP Market Value Adjustment	569,595.06

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet As of July 31, 2023

	TOTAL
Total 1605 AFP	1,903,264.94
1615 Unrestricted	
1620 TD Ameritrade Board Operating Reserve	247,838.61
1621 Unrestricted Market Value Adj	56,020.59
Total 1615 Unrestricted	303,859.20
1625 Telework	
1630 TD Ameritrade TW	242,460.79
1631 TW Market Value Adjustment	199,624.74
Total 1625 Telework	442,085.53
Total 1600 TD Ameritrade	2,649,209.67
1650 Deposits	4,500.00
Total Other Assets	\$2,653,709.67
TOTAL ASSETS	\$4,242,799.71
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2010 Accounts Payable	92,318.83
Total Accounts Payable	\$92,318.83
Credit Cards	
2006 First Federal Company Credit Cards	0.00
2007 First Fed CC - Whitney	12,069.12
2008 First Fed CC - Eric	0.00
2012 First Fed CC - Hannah	0.00
2013 First Fed CC - Tim	0.00
2014 First Fed CC - Marquesas	0.00
Total 2006 First Federal Company Credit Cards	12,069.12
Total Credit Cards	\$12,069.12
Other Current Liabilities	
2020 SS, Med and Fed W/H Tax Payable	0.00
2030 Employee Deductions Payable	80.86
2040 403-b Employee Ded. Payable	559.01
2050 Accrued Leave Payable	21,556.12
2060 FL Unemployment Taxes Payable	0.00
Deferred Revenue	0.00
Total Other Current Liabilities	\$22,195.99
Total Current Liabilities	\$126,583.94
Total Liabilities	\$126,583.94

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet As of July 31, 2023

		TOTAL
Equity		
3010 Unrestricted Net Assets		335,795.20
3020 Restricted Net Assets		2,903,221.65
Net Income		877,198.92
Total Equity		\$4,116,215.77
TOTAL LIABILITIES AND EQUITY		\$4,242,799.71

Florida Alliance for Assistive Services and Technology, Inc.
Budget vs. Actuals: 2022-2023 Fiscal Budget - FY23 P&L Classes
October 2022 - July 31 2023

	Actual	Budget	Total over Budget	% of Budget
Income				
4001 HHS Grant-Voc Rehab	725,637.39	838,291.00	-112,653.61	86.56%
4002 Florida General Revenue	465,450.86	750,000.00	-284,549.14	62.06%
4006 Revenue from Step Up Grant	90,582.89	65,774.39	24,808.50	137.72%
4007 Donations			0.00	
4007.2 Unrestricted Donations			0.00	
4007.12 Board - Monthly Donations		500.00	-500.00	0.00%
4007.3 Amazon Smile Donations	60.85	25.00	35.85	243.40%
4007.5 Staff - Monthly Donations		500.00	-500.00	0.00%
4007.7 Miscellaneous Donation		5,000.00	-5,000.00	0.00%
Total 4007.2 Unrestricted Donations	\$ 60.85	\$ 6,025.00	-\$ 5,964.15	1.01%
Total 4007 Donations	\$ 60.85	\$ 6,025.00	-\$ 5,964.15	1.01%
4019 Investments			0.00	
4020 Unrealized Gains/Losses	327,740.90		327,740.90	
4022 Interest Income	576.34	85.00	491.34	678.05%
4023 Interest Income on Direct Loans	21,993.29	25,469.71	-3,476.42	86.35%
4026 Dividend Income from Investments	52,361.90		52,361.90	
Total 4019 Investments	\$ 402,672.43	\$ 25,554.71	\$ 377,117.72	1575.73%
4027 Miscellaneous Income	66,752.84	80,000.00	-13,247.16	83.44%
4037 Grant Income	676,343.00	676,343.00	0.00	100.00%
Total Income	\$ 2,427,500.26	\$ 2,441,988.10	-\$ 14,487.84	99.41%
Gross Profit	\$ 2,427,500.26	\$ 2,441,988.10	-\$ 14,487.84	99.41%
Expenses				
5075 State Level Activities			0.00	
5100 Device Loan			0.00	
5019 Assistive Technology	75,641.94	176,821.46	-101,179.52	42.78%
5020 Shipping for AT Loan Equipment	1,628.85	6,000.00	-4,371.15	27.15%
7027 Device Loan Activities	230,375.55	303,564.88	-73,189.33	75.89%
Total 5100 Device Loan	\$ 307,646.34	\$ 486,386.34	-\$ 178,740.00	63.25%
5150 Device Demonstration			0.00	
5151 Device Demo Activities	115,187.58	151,782.44	-36,594.86	75.89%
Total 5150 Device Demonstration	\$ 115,187.58	\$ 151,782.44	-\$ 36,594.86	75.89%
5700 ReUse			0.00	
5076 Device Exchange Activities	18,000.00	20,000.00	-2,000.00	90.00%
5077 Device Refurbish Activities	74,232.27	85,000.00	-10,767.73	87.33%
Total 5700 ReUse	\$ 92,232.27	\$ 105,000.00	-\$ 12,767.73	87.84%
6000 State Financing			0.00	
5008.02 Contract Services NHLP	17,176.00	9,516.52	7,659.48	180.49%
5011 Credit Reports	1,536.90	834.11	702.79	184.26%
5026.1 NHLP Shipping	273.41	571.50	-298.09	47.84%
5061 Investment Services	16,479.54		16,479.54	
5071 NHLP Travel	869.54	6,434.50	-5,564.96	13.51%
7052 AFP Bank Charges	20.00		20.00	
7058 NHLP Legal Fees	1,520.00	8,000.00	-6,480.00	19.00%
7080 NHLP Doc Stamps	500.30		500.30	
Total 6000 State Financing	\$ 38,375.69	\$ 25,356.63	\$ 13,019.06	151.34%
6050 State Level Activities Personnel			0.00	
6010 Salary	84,782.88	149,661.16	-64,878.28	56.65%
6011 SEP Retirement	4,752.14	10,476.28	-5,724.14	45.36%
6012 Payroll Tax	7,836.32	11,972.89	-4,136.57	65.45%
6013 Employee Insurance	9,414.62	15,709.39	-6,294.77	59.93%
6014 Workers Comp	1,124.88	2,213.78	-1,088.90	50.81%
Total 6050 State Level Activities Personnel	\$ 107,910.84	\$ 190,033.50	-\$ 82,122.66	56.79%
Total 5075 State Level Activities	\$ 661,352.72	\$ 958,558.91	-\$ 297,206.19	68.99%
5175 State Leadership Activities			0.00	
5180 Trainings			0.00	
5008.01 GRANT Multimedia Consulting Fee	63,067.42	50,625.00	12,442.42	124.58%
5181 Training Activities	214,979.39	279,866.42	-64,887.03	76.81%
5182 Transition Training Activities	9,791.01	16,765.82	-6,974.81	58.40%
Total 5180 Trainings	\$ 287,837.82	\$ 347,257.24	-\$ 59,419.42	82.89%
5185 Information and Assistance			0.00	
5185.1 Information and Assistance Activities	34,556.27	84,136.82	-49,580.55	41.07%
Total 5185 Information and Assistance	\$ 34,556.27	\$ 84,136.82	-\$ 49,580.55	41.07%
5190 Public Awareness	28,950.86		28,950.86	
5036 Public Awareness Materials	1,200.00	6,100.00	-4,900.00	19.67%
5036.1 Registration and Exhibit Fees	15,100.00	4,255.20	10,844.80	354.86%

5051 Website Modifications		1,078.85	-1,078.85	0.00%
5056 Public Awareness Travel	7,535.77	8,242.00	-706.23	91.43%
5060 RDC Travel	12,705.46	37,716.00	-25,010.54	33.69%
7003 FAAST Van	706.70	1,000.00	-293.30	70.67%
Total 5190 Public Awareness	\$ 66,198.79	\$ 58,392.05	\$ 7,806.74	113.37%
5191 Public Awareness - The Annual Family Cafe	158.89		158.89	
5194 Public Awareness Travel	3,274.93	1,998.00	1,276.93	163.91%
5196 Contracted Services	4,900.00	3,900.00	1,000.00	125.64%
Total 5191 Public Awareness - The Annual Family Cafe	\$ 8,333.82	\$ 5,898.00	\$ 2,435.82	141.30%
5198 Technical Assistance			0.00	
5003 Contract Activities	613.25	500.00	113.25	122.65%
5026.2 BOD - Shipping		34.75	-34.75	0.00%
5028 Insurance - Dir and Officers	642.58	710.00	-67.42	90.50%
5037 BOD Travel	6,790.90	18,768.00	-11,977.10	36.18%
5040 BOD - Professional Development	16.31		16.31	
5065 Contract Monitoring	2,919.49	5,395.00	-2,475.51	54.11%
5070 Executive Director Travel	2,725.88	4,382.00	-1,656.12	62.21%
Total 5198 Technical Assistance	\$ 13,708.41	\$ 29,789.75	\$ 16,081.34	46.02%
6060 State Leadership Activities Personnel			0.00	
6015 Salary	105,275.85	105,081.24	194.61	100.19%
6016 SEP Retirement	5,916.50	7,355.69	-1,439.19	80.43%
6017 Payroll Tax	8,186.67	8,406.50	-219.83	97.38%
6018 Employee Insurance	11,521.63	11,029.99	491.64	104.46%
6019 Workers Comp	1,396.73	2,204.51	-807.78	63.36%
Total 6060 State Leadership Activities Personnel	\$ 132,297.38	\$ 134,077.93	\$ 1,780.55	98.67%
Total 5175 State Leadership Activities	\$ 542,932.49	\$ 659,551.79	\$ 116,619.30	82.32%
5250 Operational Expense			0.00	
5000 Contractual Expense			0.00	
5008 Contracted Services	154,568.06	174,683.43	-20,115.37	88.48%
Total 5000 Contractual Expense	\$ 154,568.06	\$ 174,683.43	\$ 20,115.37	88.48%
5005 Equipment Expense			0.00	
5014 Equipment - Under \$500	2,668.41	499.69	2,168.72	534.01%
5015 Equipment - Over \$500	9,010.12	2,498.44	6,511.68	360.63%
Total 5005 Equipment Expense	\$ 11,678.53	\$ 2,998.13	\$ 8,680.40	389.53%
5021 Office Supplies	3,238.35	4,198.89	-960.54	77.12%
5022 Rent	49,500.00	53,966.25	-4,466.25	91.72%
5026 Postage/Shipping	1,429.39	719.55	709.84	198.65%
5029 Insurance - General/Office Liab	9,095.13	8,838.59	256.54	102.90%
5030 Legal	438.00	3,547.78	-3,109.78	12.35%
5031 Membership Fees	150.00	20,461.45	-20,311.45	0.73%
5032 Banking Fees - Operations	484.40	19.99	464.41	2423.21%
5033 Corporate Fees	80.25	144.91	-64.66	55.38%
5041 Local Travel	209.23	199.89	9.34	104.67%
5053 Utilities	9,084.19	10,152.49	-1,068.30	89.48%
5252 Professional Development	1,541.80	1,194.25	347.55	129.10%
5253 Professional Development - Travel		3,537.79	-3,537.79	0.00%
5254 Payroll Service Fees	1,400.17	1,402.60	-2.43	99.83%
5300 Operations Personnel			0.00	
6001 Salary	88,126.67	145,028.90	-56,902.23	60.76%
6002 SEP Retirement	4,796.64	8,052.03	-3,255.39	59.57%
6003 Payroll Tax expense	6,942.65	11,429.43	-4,486.78	60.74%
6004 Employee Insurance	2,316.90	3,392.30	-1,075.40	68.30%
6006 Insurance - Workers Comp	906.71	1,633.85	-727.14	55.50%
Total 5300 Operations Personnel	\$ 103,089.57	\$ 169,536.51	\$ 66,446.94	60.81%
Total 5250 Operational Expense	\$ 345,987.07	\$ 455,602.50	\$ 109,615.43	75.94%
Total Expenses	\$ 1,550,272.28	\$ 2,073,713.20	\$ 523,440.92	74.76%
Net Operating Income	\$ 877,227.98	\$ 368,274.90	\$ 508,953.08	238.20%
Net Income	\$ 877,227.98	\$ 368,274.90	\$ 508,953.08	238.20%

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Florida Alliance for Assistive Services and Technology, Inc.

Profit and Loss

October 2022 - July 2023

	TOTAL
Income	
4001 HHS Grant-Voc Rehab	725,637.39
4002 Florida General Revenue	465,450.86
4006 Revenue from Step Up Grant	90,582.89
4007 Donations	
4007.2 Unrestricted Donations	
4007.3 Amazon Smile Donations	60.85
Total 4007.2 Unrestricted Donations	60.85
Total 4007 Donations	60.85
4019 Investments	
4020 Unrealized Gains/Losses	327,740.90
4022 Interest Income	576.34
4023 Interest Income on Direct Loans	21,964.25
4026 Dividend Income from Investments	52,361.90
Total 4019 Investments	402,643.39
4027 Miscellaneous Income	66,752.84
4037 Grant Income	676,343.00
Total Income	\$2,427,471.22
GROSS PROFIT	\$2,427,471.22
Expenses	
5075 State Level Activites	
5100 Device Loan	
5019 Assistive Technology	75,641.94
5020 Shipping for AT Loan Equipment	1,628.85
7027 Device Loan Activities	230,375.55
Total 5100 Device Loan	307,646.34
5150 Device Demonstration	
5151 Device Demo Activities	115,187.58
Total 5150 Device Demonstration	115,187.58
5700 ReUse	
5076 Device Exchange Activities	18,000.00
5077 Device Refurbish Activities	74,232.27
Total 5700 ReUse	92,232.27
6000 State Financing	
5008.02 Contract Services NHLP	17,176.00
5011 Credit Reports	1,536.90
5026.1 NHLP Shipping	273.41
5061 Investment Services	16,479.54
5071 NHLP Travel	869.54
7052 AFP Bank Charges	20.00

Florida Alliance for Assistive Services and Technology, Inc.

Profit and Loss

October 2022 - July 2023

	TOTAL
7058 NHLP Legal Fees	1,520.00
7080 NHLP Doc Stamps	500.30
Total 6000 State Financing	38,375.69
6050 State Level Activities Personnel	
6010 Salary	84,782.88
6011 SEP Retirement	4,752.14
6012 Payroll Tax	7,836.34
6013 Employee Insurance	9,414.62
6014 Workers Comp	1,124.88
Total 6050 State Level Activities Personnel	107,910.86
Total 5075 State Level Activities	661,352.74
5175 State Leadership Activities	
5180 Trainings	
5008.01 GRANT Multimedia Consulting Fee	63,067.42
5181 Training Activities	214,979.39
5182 Transition Training Activities	9,791.01
Total 5180 Trainings	287,837.82
5185 Information and Assistance	
5185.1 Information and Assistance Activities	34,556.27
Total 5185 Information and Assistance	34,556.27
5190 Public Awareness	28,950.86
5036 Public Awareness Materials	1,200.00
5036.1 Registration and Exhibit Fees	15,100.00
5056 Public Awareness Travel	7,535.77
5060 RDC Travel	12,705.46
7003 FFAST Van	706.70
Total 5190 Public Awareness	66,198.79
5191 Public Awareness - The Annual Family Cafe	158.89
5194 Public Awareness Travel	3,274.93
5196 Contracted Services	4,900.00
Total 5191 Public Awareness - The Annual Family Cafe	8,333.82
5198 Technical Assistance	
5003 Contract Activities	613.25
5028 Insurance - Dir and Officers	642.58
5037 BOD Travel	6,790.90
5040 BOD - Professional Development	16.31
5065 Contract Monitoring	2,919.49
5070 Executive Director Travel	2,725.88
Total 5198 Technical Assistance	13,708.41

Florida Alliance for Assistive Services and Technology, Inc.

Profit and Loss

October 2022 - July 2023

	TOTAL
6060 State Leadership Activities Personnel	
6015 Salary	105,275.85
6016 SEP Retirement	5,916.50
6017 Payroll Tax	8,186.67
6018 Employee Insurance	11,521.63
6019 Workers Comp	1,396.73
Total 6060 State Leadership Activities Personnel	132,297.38
Total 5175 State Leadership Activities	542,932.49
5250 Operational Expense	
5000 Contractual Expense	
5008 Contracted Services	154,568.06
Total 5000 Contractual Expense	154,568.06
5005 Equipment Expense	
5014 Equipment - Under \$500	2,668.41
5015 Equipment - Over \$500	9,010.12
Total 5005 Equipment Expense	11,678.53
5021 Office Supplies	3,238.35
5022 Rent	49,500.00
5026 Postage/Shipping	1,429.39
5029 Insurance - General/Office Liab	9,095.13
5030 Legal	438.00
5031 Membership Fees	150.00
5032 Banking Fees - Operations	484.40
5033 Corporate Fees	80.25
5041 Local Travel	209.23
5053 Utilities	9,084.19
5252 Professional Development	1,541.80
5254 Payroll Service Fees	1,400.17
5300 Operations Personnel	
6001 Salary	88,126.67
6002 SEP Retirement	4,796.64
6003 Payroll Tax expense	6,942.65
6004 Employee Insurance	2,316.90
6006 Insurance - Workers Comp	906.71
Total 5300 Operations Personnel	103,089.57
Total 5250 Operational Expense	345,987.07
Total Expenses	\$1,550,272.30
NET OPERATING INCOME	\$877,198.92
NET INCOME	\$877,198.92

		Accounting Code	AT Act	AFP	TW	GA	Step Up	Totals	Comments
			66.62500%	26.40000%	3.59500%	2.12500%	1.25%	100.00%	Rationale/Explanation
Income									
Grants and Contracts									
HHS Grant-Voc Rehab		4001	\$ 838,291.00	\$ -	\$ -	\$ -	\$ -	\$ 838,291.00	Federal Funds, contracted through VR for year ending September 30, 2024
Florida General Revenue		4002	\$ 750,000.00	\$ -	\$ -	\$ -	\$ -	\$ 750,000.00	State Funds, contracted through VR for year end September 30, 2024
Step Up Grant		4006	\$ -	\$ -	\$ -	\$ 5,979.85	\$ 59,798.54	\$ 65,778.39	University of Miami Grant, Year 4 (of 5 year grant) for year ending September 30, 2024. (Grant
Total Grants and Contracts			\$ 1,588,291.00	\$ -	\$ -	\$ 5,979.85	\$ 59,798.54	\$ 1,654,069.39	
Donations									
		4007							
Restricted Donations									
Board - Statewide Device Loan		4007.14	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Staff - Statewide Device Loan		4007.4	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Other FFAST Service		4007.15	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
In-Kind Equipment		4007.17	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Unrestricted Donations									
Board - Monthly Donation		4007.12	\$ -	\$ -	\$ -	\$ 500.00	\$ -	\$ 500.00	Estimates for new fundraising goals
Staff - Monthly Donation		4007.5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimates for new fundraising goals
Miscellaneous Donation			\$ 10,000.00	\$ -	\$ -	\$ 5,000.00	\$ 1,051.98	\$ 16,051.98	Estimates for new fundraising goals; step up from GA to offset increase from salary increase
In-Kind Equipment			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Amazon Smile Donations		4007.3	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	No longer an active program
Total Donations			\$ 10,000.00	\$ -	\$ -	\$ 5,500.00	\$ 1,051.98	\$ 16,551.98	
FAAST Access Advertising									
		4010	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	No longer have an Access Magazine
Investments									
Transfer from Investments		1120	\$ -	\$ 152,110.57	\$ 17,676.82	\$ 31,848.78	\$ -	\$ 201,636.17	Transfers necessary to balance budget in AFP, TW and GA
Interest Income		4022	\$ -	\$ -	\$ -	\$ 85.00	\$ -	\$ 85.00	
Interest Income on Direct Loans		4023	\$ -	\$ 20,573.00	\$ 5,345.00	\$ -	\$ -	\$ 25,918.00	100% of 2023-2024 estimate
Closing Fee		4024	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	closing fees only cover actual costs, no income received
Total Investments			\$ -	\$ 172,683.57	\$ 23,021.82	\$ 31,933.78	\$ -	\$ 227,639.17	
Miscellaneous Income									
		4027	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Grant Income									
		4037	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Fee-for-Service Income									
Equipment Sales		4013	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	not services we currently provide
Training		4014	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	not services we currently provide
Assessments		4015	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	not services we currently provide
Total Fee-for-Service			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Total Income			\$ 1,598,291.00	\$ 172,683.57	\$ 23,021.82	\$ 43,413.63	\$ 60,850.52	\$ 1,898,260.54	
Expenses									
State Level Activities									
Device Loan									
Assistive Technology		5019	\$ 140,000.00	\$ -	\$ -	\$ 15,000.00	\$ -	\$ 155,000.00	AT purchased for HQ and centers
Shipping for AT Loan Equipment		5020	\$ 4,500.00	\$ -	\$ -	\$ -	\$ -	\$ 4,500.00	Increased to allow more shipping to rural areas
Classroom Kits		5120	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Not included on Step Up year 4 grant budget
Device Loan Activities		7027	\$ 303,564.88	\$ -	\$ -	\$ -	\$ -	\$ 303,564.88	40% of RDC Contracts
Device Demonstration									
Device Demo Activities		5151	\$ 151,782.44	\$ -	\$ -	\$ -	\$ -	\$ 151,782.44	20% of RDC Contracts
ReUse									
Device Exchange Activities	\$ 100,000.00	5076	\$ 20,000.00	\$ -	\$ -	\$ -	\$ -	\$ 20,000.00	20% of RRC Contracts
Device Refurbish Activities		5077	\$ 81,500.00	\$ -	\$ -	\$ -	\$ -	\$ 81,500.00	80% of RRC Contracts
State Financing									
NHLP Contract Services	\$ 5,016.52	5008.02	\$ -	\$ 4,414.54	\$ 601.98	\$ -	\$ -	\$ 5,016.52	Down Home Solutions, DDI,Vista Share, and Credit Builders Alliance
Credit Reports	\$ 1,800.00	5011	\$ -	\$ 1,584.00	\$ 216.00	\$ -	\$ -	\$ 1,800.00	100% of 2022-2023 Total, Plus 10% growth
NHLP Shipping	\$ 200.00	5026.1	\$ -	\$ 176.00	\$ 24.00	\$ -	\$ -	\$ 200.00	Reduced due to eSignature process
NHLP Travel	\$ 3,197.50	5071	\$ -	\$ 2,813.80	\$ 383.70	\$ -	\$ -	\$ 3,197.50	Majority of travel will be under ED travel
Telework Bank Charges		7050	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimating no bank fee charges
Bank Default and Rescue Payments		7051	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Not estimated for budget - no direct impact on budget
AFP Bank Charges		7052	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Estimating no bank fee charges
NHLP Legal Fees	\$ 1,500.00	7058	\$ -	\$ 1,320.00	\$ 180.00	\$ -	\$ -	\$ 1,500.00	2023 actuals used
NHLP Doc Stamps		7080	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	Doc stamps are reimbursed by Borrowers
SELF Buy Down Program	\$ -	7085	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	no longer an active program

State Level Activites Personnel

Salary	\$	173,677.44	\$	-	\$	-	\$	-	\$	-	\$	173,677.44	Based on Estimated Time and Effort Allocations
SEP Retirement	\$	10,424.73	\$	-	\$	-	\$	-	\$	-	\$	10,424.73	Based on Estimated Time and Effort Allocations
Payroll Tax	\$	13,894.19	\$	-	\$	-	\$	-	\$	-	\$	13,894.19	8% of Employee's Salary
Employee Insurance	\$	12,736.65	\$	-	\$	-	\$	-	\$	-	\$	12,736.65	Based on Estimated Time and Effort Allocations
Workers Comp	\$	2,313.80	\$	-	\$	-	\$	-	\$	-	\$	2,313.80	Based on Estimated Time and Effort Allocations
Total State Level Activities	\$	914,394.14	\$	10,308.34	\$	1,405.68	\$	15,000.00	\$	-	\$	941,108.16	

State Leadership Activities

Trainings

Step-Up Multimedia Consulting Fee		5008.01	\$	-	\$	-	\$	-	\$	50,625.00	\$	50,625.00	Based on Step Up 3 year grant budget	
Training Activities		5181	\$	242,648.50	\$	-	\$	-	\$	-	\$	242,648.50	34% of RDC Contracts	
Transition Training Activities	\$	15,381.65	5182	\$	15,381.65	\$	-	\$	-	\$	-	\$	15,381.65	5% of HHS State Leadership Activities based on ATAP Federal Guidelines

Information and Assistance

Information and Assistance Activities		5185.1	\$	45,534.73	\$	-	\$	-	\$	-	\$	45,534.73	6% of RDC Contracts
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Public Awareness

Public Awareness Materials	\$	2,000.00	5036	\$	1,698.00	\$	302.00	\$	-	\$	-	\$	2,000.00	Estimate provided by Executive Director
Registration and Exhibits Fees	\$	8,000.00	5036.1	\$	6,000.00	\$	1,760.00	\$	240.00	\$	-	\$	8,000.00	Estimate provided by Executive Director-includes 2023 actual plus increase for additonal oport
Website Modifications	\$	350.00	5051	\$	70.00	\$	250.00	\$	30.00	\$	-	\$	350.00	Based on three-year GoDaddy contract
Public Awareness Travel	\$	4,242.00	5056	\$	4,242.00	\$	-	\$	-	\$	-	\$	4,242.00	based on 2023 actuals plus new opportunities
RDC Travel	\$	21,000.00	5060	\$	21,000.00	\$	-	\$	-	\$	-	\$	21,000.00	Primarily ATIA
RDC Exhibits	\$	2,760.00	5080	\$	2,200.00	\$	-	\$	-	\$	-	\$	2,200.00	proposed new option - \$200 per center for local/rural
FAAST Van	\$	100.00	7003	\$	100.00	\$	-	\$	-	\$	-	\$	100.00	Van annual registration and maintenance
FC Public Awareness Materials	\$	1,000.00	5192	\$	-	\$	-	\$	-	\$	1,000.00	\$	1,000.00	Family Café - estimate provided by Executive Director
FC RDC Travel	\$	-	5193	\$	-	\$	-	\$	-	\$	-	\$	-	Family Café - Estimate provided by Executive Director
FC Public Awareness Travel	\$	3,600.00	5194	\$	3,600.00	\$	-	\$	-	\$	-	\$	3,600.00	Family Café - 2023 actual plus one additional employee
FC Contract Services			5196	\$	4,900.00	\$	-	\$	-	\$	-	\$	4,900.00	The Family Café Exhibitor Fee (2023 fee)
FC BOD Travel	\$	500.00	5197	\$	-	\$	-	\$	-	\$	500.00	\$	500.00	Opportunity for ATAC members to join

Technical Assistance

Contract Services			5003	\$	-	\$	-	\$	-	\$	-	\$	-	No cost expected (past cost was meeting room rental cost)
BOD - Shipping			5026.2	\$	-	\$	-	\$	-	\$	-	\$	-	5 Shipments at \$6.95/Shipment
Insurance - Dir and Officers	\$	710.00	5028	\$	710.00	\$	-	\$	-	\$	-	\$	710.00	2023-2024 total
BOD Travel	\$	14,256.00	5037	\$	7,000.00	\$	-	\$	-	\$	7,256.00	\$	14,256.00	2 In-person ATAC Meetings plus potential for strategic planning session
BOD - Professional Development			5040	\$	-	\$	-	\$	-	\$	-	\$	-	No estimated expense
Contract Monitoring			5065	\$	1,500.00	\$	-	\$	-	\$	-	\$	1,500.00	based on ten trips, some being mileage only same day trips
Executive Director Travel	\$	4,200.00	5070	\$	4,200.00	\$	-	\$	-	\$	-	\$	4,200.00	trips including AT3 in DC and ATIA

State Leadership Activities Personnel

Salary	6001	\$	132,593.30	\$	-	\$	-	\$	-	\$	-	\$	132,593.30	Based on Estimated Time and Effort Allocations
SEP Retirement	6002	\$	7,958.72	\$	-	\$	-	\$	-	\$	-	\$	7,958.72	Based on Estimated Time and Effort Allocations
Payroll Tax	6003	\$	10,607.46	\$	-	\$	-	\$	-	\$	-	\$	10,607.46	8% of Employee's Salary
Employee Insurance	6004	\$	9,723.74	\$	-	\$	-	\$	-	\$	-	\$	9,723.74	Based on Estimated Time and Effort Allocations
Workers Comp	6006	\$	2,313.80	\$	-	\$	-	\$	-	\$	-	\$	2,313.80	Based on Estimated Time and Effort Allocations
Total State Leadership Activities		\$	523,981.92	\$	2,312.00	\$	270.00	\$	8,756.00	\$	50,625.00	\$	585,944.92	

Operations Expense

Contractual Expenses

														Contract services include monthly recurring services and annual costs (highest individual costs are independent CPA at \$19,800 for year, Website contract at \$25,000, and annual financial audit at \$18,000)		
Contract Services		5008	\$	92,052.84	\$	33,831.75	\$	4,581.38	\$	1,710.70	\$	-	\$	132,176.67		
Equipment Expense																
Equipment - Under \$500	\$	500.00	5014	\$	333.13	\$	132.00	\$	17.98	\$	10.63	\$	6.25	\$	499.98	Estimate provided by Administrative and Financial Coordinator
Equipment - Over \$500	\$	2,000.00	5015	\$	1,332.50	\$	528.00	\$	71.90	\$	42.50	\$	25.00	\$	1,999.90	Estimate provided by Administrative and Financial Coordinator
Office Supplies	\$	1,800.00	5021	\$	1,199.25	\$	2,875.20	\$	64.71	\$	38.25	\$	-	\$	4,177.41	\$150/month
Rent	\$	54,000.00	5022	\$	35,978.23	\$	14,256.00	\$	1,941.30	\$	1,147.50	\$	675.00	\$	53,998.03	\$4,500/month
Postage/Shipping	\$	1,000.00	5026	\$	665.99	\$	264.31	\$	35.95	\$	21.25	\$	12.50	\$	1,000.00	Estimate provided by Executive Director
Insurance - General/Office Liab/Van	\$	13,499.00	5029	\$	8,993.71	\$	3,563.74	\$	485.29	\$	286.85	\$	168.74	\$	13,498.33	100% of 2020-2021 Total
Legal	\$	1,000.00	5030	\$	670.00	\$	264.00	\$	35.95	\$	17.55	\$	12.50	\$	1,000.00	5 hours at \$200
Membership Fees	\$	10,468.00	5031	\$	6,974.31	\$	2,763.55	\$	376.32	\$	219.55	\$	130.85	\$	10,464.58	ATAP \$10,163, AIRS \$305
Banking Fees - Operations	\$	-	5032	\$	-	\$	-	\$	-	\$	-	\$	-	\$	-	no fees expected
Corporate Fees	\$	145.00	5033	\$	96.61	\$	38.28	\$	5.21	\$	3.08	\$	1.81	\$	144.99	Division of Corporation and Solicitation of Contributions Renewal Fees
Local Travel	\$	200.00	5041	\$	133.25	\$	52.80	\$	7.19	\$	4.25	\$	-	\$	197.49	20 Trips at \$10/Trip
Utilities	\$	11,000.00	5053	\$	7,328.75	\$	2,904.00	\$	395.45	\$	233.75	\$	-	\$	10,861.95	100% of 2020-2021 Total (Comcast, City of Tallahassee, DMS, and Verizon)

Professional Development Travel	\$	3,640.00	5038	\$	2,425.15	\$	960.96	\$	130.86	\$	77.35	\$	45.50	\$	3,639.82	AIRS Conference, ATIA and AT3
PD Registration	\$	1,195.00	5600	\$	796.17	\$	315.48	\$	42.96	\$	25.39	\$	14.94	\$	1,194.94	AT3; ATIA; AIRS; staff retreat rental space
Payroll Service Fees	\$	1,403.48	6008	\$	935.07	\$	370.52	\$	50.46	\$	29.82	\$	17.54	\$	1,403.41	\$44.50 fee per payroll (24 per year) and \$45 for W-2 processing
Operations Personnel																
Salary			6001	\$	-	\$	78,875.24	\$	10,667.72	\$	12,750.00	\$	7,203.60	\$	109,496.56	Based on Estimated Time and Effort Allocations (0% of AT Act)
SEP Retirement			6002	\$	-	\$	4,560.31	\$	615.70	\$	892.50	\$	504.25	\$	6,572.76	Based on Estimated Time and Effort Allocations (0% of AT Act)
Payroll Tax			6003	\$	-	\$	6,310.02	\$	853.42	\$	1,020.00	\$	576.29	\$	8,759.72	8% of Employee's Salary
Employee Insurance			6004	\$	-	\$	6,099.38	\$	818.49	\$	992.97	\$	748.73	\$	8,659.57	Based on Estimated Time and Effort Allocations (0% of AT Act)
Workers Comp			6006	\$	-	\$	1,097.69	\$	147.90	\$	133.74	\$	82.02	\$	1,461.35	Based on Estimated Time and Effort Allocations (0% of AT Act)
Total Operations Expense				\$	159,914.94	\$	160,063.23	\$	21,346.14	\$	19,657.64	\$	10,225.52	\$	371,207.46	
Total Expenses				\$	1,598,291.00	\$	172,683.57	\$	23,021.82	\$	43,413.64	\$	60,850.52	\$	1,898,260.54	
Net Operating Income				\$	0.00	\$	0.00	\$	0.00	\$	(0.00)	\$	(0.00)	\$	0.00	

	2023-2024	2022-2023	
	Totals	Totals	
	100.00%	100.00%	
1 Income			
2 Grants and Contracts			
3 HHS Grant-Voc Rehab	\$ 838,291.00	\$ 838,291.00	
4 Florida General Revenue	\$ 750,000.00	\$ 750,000.00	
5 Step Up Grant	\$ 65,778.39	\$ 65,778.39	
6 Total Grants and Contracts	\$ 1,654,069.39	\$ 1,654,069.39	
7 Donations			
8 Restricted Donations			
9 Board - Statewide Device Loan	\$ -	\$ -	
10 Staff - Statewide Device Loan	\$ -	\$ -	
11 Other FFAST Service	\$ -	\$ -	
12 In-Kind Equipment	\$ -	\$ -	
13 Unrestricted Donations			
14 Board - Monthly Donation	\$ 500.00	\$ 500.00	
15 Staff - Monthly Donation	\$ -	\$ 500.00	
16 Miscellaneous Donation	\$ 16,051.98	\$ 5,000.00	fundraising necessary
17 In-Kind Equipment	\$ -	\$ -	
18 Amazon Smile Donations	\$ -	\$ 25.00	
19 Total Donations	\$ 16,551.98	\$ 6,025.00	
20 FFAST Access Advertising	\$ -	\$ -	
21 Investments			
22 Transfer from Investments	\$ 201,636.17	\$ 65,146.08	investment transfers shown to balance budget
23 Interest Income	\$ 85.00	\$ 85.00	
24 Interest Income on Direct Loans	\$ 25,918.00	\$ 25,469.71	
25 Closing Fee	\$ -	\$ -	
26 Total Investments	\$ 227,639.17	\$ 90,700.79	
27 Miscellaneous Income	\$ -	\$ 80,000.00	ATPH (COVID related) grant - non recurring
28 Grant Income	\$ -	\$ 676,343.00	ACL-NHLP grant - non recurring
29 Fee-for-Service Income			
30 Equipment Sales	\$ -	\$ -	
31 Training	\$ -	\$ -	
32 Assessments	\$ -	\$ -	
33 Total Fee-for-Service	\$ -	\$ -	
34 Total Income	\$ 1,898,260.54	\$ 2,507,138.18	
35 Expenses			
36 State Level Activities			
37 Device Loan			
38 Assistive Technology	\$ 155,000.00	\$ 176,790.21	still exceeds contract amount for center AT purchases
39 Shipping for AT Loan Equipment	\$ 4,500.00	\$ 6,000.00	
40 Classroom Kits	\$ -	\$ -	
41 Device Loan Activities	\$ 303,564.88	\$ 303,564.88	
42 Device Demonstration			
43 Device Demo Activities	\$ 151,782.44	\$ 151,782.44	450
44 ReUse			4500
45 Device Exchange Activities	\$ 20,000.00	\$ 20,000.00	
46 Device Refurbish Activities	\$ 81,500.00	\$ 85,000.00	
47 State Financing			
48 NHLP Contract Services	\$ 5,016.52	\$ 9,516.52	one-time \$5,000 not included in 2024
49 Credit Reports	\$ 1,800.00	\$ 834.12	actual plus volume increase
50 NHLP Shipping	\$ 200.00	\$ 571.50	
51 NHLP Travel	\$ 3,197.50	\$ 6,434.50	
52 Telework Bank Charges	\$ -	\$ -	
53 Bank Default and Rescue Payments	\$ -	\$ -	
54 AFP Bank Charges	\$ -	\$ -	
55 NHLP Legal Fees	\$ 1,500.00	\$ 8,000.00	prior budget anticipated NHLP split
56 NHLP Doc Stamps	\$ -	\$ -	
57 SELF Buy Down Program	\$ -	\$ -	
58 State Level Activities Personnel			
59 Salary	\$ 173,677.44	\$ 149,661.16	salary increases plus anticipated new staff
60 SEP Retirement	\$ 10,424.73	\$ 10,476.28	
61 Payroll Tax	\$ 13,894.19	\$ 11,972.89	
62 Employee Insurance	\$ 12,736.65	\$ 15,709.38	
63 Workers Comp	\$ 2,313.80	\$ 2,213.78	
64 Total State Level Activities	\$ 941,108.16	\$ 958,527.67	
65 State Leadership Activities			
66 Trainings			
67 Step-Up Multimedia Consulting Fee	\$ 50,625.00	\$ 50,625.00	
68 Training Activities	\$ 242,648.50	\$ 279,866.42	ATPH payment in 2023
69 Transition Training Activities	\$ 15,381.65	\$ 16,765.82	
70 Information and Assistance			
71 Information and Assistance Activities	\$ 45,534.73	\$ 84,136.82	ATPH payment in 2023
72 Public Awareness			
73 Public Awareness Materials	\$ 2,000.00	\$ 6,100.00	
74 Registration and Exhibits Fees	\$ 8,000.00	\$ 4,255.20	
75 Website Modifications	\$ 350.00	\$ 1,079.52	
76 Public Awareness Travel	\$ 4,242.00	\$ 8,242.00	
77 RDC Travel	\$ 21,000.00	\$ 37,716.00	reduced travel due to a FFAST U event taking place during ATIA plus virtual
78 RDC Exhibits	\$ 2,200.00	\$ -	new to allow local exhibiting
79 FFAST Van	\$ 100.00	\$ 1,000.00	
80 FC Public Awareness Materials	\$ 1,000.00	\$ -	Family Café - table giveaways
81 FC RDC Travel	\$ -	\$ -	
82 FC Public Awareness Travel	\$ 3,600.00	\$ 1,996.00	
83 FC Contract Services	\$ 4,900.00	\$ 3,900.00	
84 FC BOD Travel	\$ 500.00	\$ -	
85 Technical Assistance			
86 Contract Services	\$ -	\$ 500.00	
87 BOD - Shipping	\$ -	\$ 34.75	
88 Insurance - Dir and Officers	\$ 710.00	\$ 710.00	
89 BOD Travel	\$ 14,256.00	\$ 18,768.00	
90 BOD - Professional Development	\$ -	\$ -	
91 Contract Monitoring	\$ 1,500.00	\$ 5,395.00	
92 Executive Director Travel	\$ 4,200.00	\$ 4,382.00	
93 State Leadership Activities Personnel			
94 Salary	\$ 132,593.30	\$ 105,081.24	
95 SEP Retirement	\$ 7,958.72	\$ 7,355.69	
96 Payroll Tax	\$ 10,607.46	\$ 8,406.50	
97 Employee Insurance	\$ 9,723.74	\$ 11,029.99	
98 Workers Comp	\$ 2,313.80	\$ 2,204.51	
99 Total State Leadership Activities	\$ 585,944.92	\$ 659,552.46	
100 Operations Expense			
101 Contractual Expenses			
102 Contract Services	\$ 132,176.67	\$ 174,775.47	strategic planning included in 2023 - still to be paid
103 Equipment Expense			
104 Equipment - Under \$500	\$ 499.98	\$ 500.00	
105 Equipment - Over \$500	\$ 1,999.90	\$ 2,500.00	
106 Office Supplies	\$ 4,177.41	\$ 4,200.00	
107 Rent	\$ 53,998.03	\$ 54,000.00	
108 Postage/Shipping	\$ 1,000.00	\$ 720.00	
109 Insurance - General/Office Liab/Van	\$ 13,498.33	\$ 8,844.11	
110 Legal	\$ 1,000.00	\$ 3,550.00	
111 Membership Fees	\$ 10,464.58	\$ 20,466.00	reduced due to not renewing Florida Chamber membership
112 Banking Fees - Operations	\$ -	\$ 20.00	
113 Corporate Fees	\$ 144.99	\$ 145.00	
114 Local Travel	\$ 197.49	\$ 200.00	
115 Utilities	\$ 10,861.95	\$ 10,158.48	
116 PD Travel	\$ 3,639.82	\$ 3,540.00	
117 PD Registration	\$ 1,194.94	\$ 1,195.00	
118 Payroll Service Fees	\$ 1,403.41	\$ 1,403.48	
119 Operations Personnel			
120 Salary	\$ 109,496.56	\$ 145,028.90	
121 SEP Retirement	\$ 6,572.76	\$ 7,178.42	
122 Payroll Tax	\$ 8,759.72	\$ 11,429.43	
123 Employee Insurance	\$ 8,659.57	\$ 3,392.30	
124 Workers Comp	\$ 1,461.35	\$ 1,633.84	
125 Total Operations Expense	\$ 371,207.46	\$ 454,882.44	
126 Total Expenses	\$ 1,898,260.54	\$ 2,072,962.57	
127 Net Operating Income	\$ 0.00	\$ 434,175.61	

Fiscal Year 2023						
Florida Alliance for Assistive Services and Technology, Inc.						
Florida Assistive Technology Advisory Council/FAAST Board of Directors						
Count	Category	Name	Region/State Agency	Term	Term Start	Term End
1	4	Horace Brown	DVR	1	5/15/2020	5/14/2023
2	1	Betsy Burgos	ARDC	1	1/20/2021	1/20/2024
3	1	Enrique Escallon	SFL	1	9/14/2020	9/14/2023
4	1	Sarah Goldman	NW	1	10/1/2022	9/30/2025
5	3	Janet Good	CFL	2	3/1/2022	2/28/2025
6	1	Eddie Hall	CFL	1	5/15/2020	5/14/2023
7	1	Mary Jarrett	NE	1	1/20/2021	1/20/2024
8	3	Lesa Berg Kretschmer	SFL	1	5/15/2020	5/14/2023
9	4	Dan McGrew	CareerSource	1	10/1/2022	9/30/2025
10	3	Kailey Medlock	CFL	1	5/15/2020	5/14/2023
11	1	TJ Moon	CFL	1	9/14/2020	9/14/2023
12	1	Brian Nerland	NW	1	5/15/2020	5/14/2023
13	1	Brandon Palermo	NCFL	1	1/20/2021	1/20/2024
14	2	Angel Perez	NCFL	1	10/1/2022	9/30/2025
15	4	Kristi Warren	CIL	1	10/1/2022	9/30/2025
16	4	Adriann Keve	DBS	1	4/17/2023	4/16/2026
17	4	VACANT	DOE	1		
18	5	VACANT	OTHER AGENCY	1		
19	1	VACANT		1		
20	1	VACANT		1		
21	1	VACANT		1		

Membership Categories	
1	Individuals with disabilities that use assistive technology or the family members or guardians of the individuals.
2	Representatives of consumer organizations concerned with assistive technology.
3	Representatives of business and industry, including the insurance industry, concerned with assistive technology.
4	State agencies that provide or coordinate assistive technology devices or services for persons with disabilities.
5	A Representative from at least one of the following (see bylaws for full descriptions): state medicaid agency; state developmental disability agency; agency or organization under Older Americans Act; organization representing disabled veterans; University Center of Excellence; state council on developmental disabilities; state protection and advocacy center for developmental disabilities.

Membership Breakdown				
Category	Current Member Breakdown	Percentage	Percentage Needed	# of Needed for Compliance
1	8	50%	51%	3*
2	1	6%	1 person	0
3	3	19%	1 person	0
4/5	4	25%	6 Members	2
Totals	16	100%		5

Board Application

Thank you for your interest in becoming a FAAST board member. If you would prefer to fill the application in any other format (Word, Pdf, verbally, etc), please contact us at: Local Phone: (850) 487-3278 Toll-Free 1-844-FL-FAAST (353-2278) Fax: (850) 575-4216 Email: info@faast.org

Preferred Pronoun

Choose 

First Name *

Donald

Last Name *

Risavy

Contact Number *

8502081923

Email Address *

Street

329 Wilder Blvd. C102

City

Daytona Beach

State

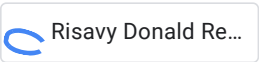
Please enter the State as the two letter abbreviation.

FL

Zip Code

32114

Please Upload Your CV or Resume in PDF Format *



Current Employer *

Division of Blind Services

Employer Contact Number

3862584444

Employer Address

408 White ST

Employer City

Daytona Beach

Employer State

Please enter the State as the two letter abbreviation.

FL

Employer Zip Code

32114

Reference First Name *

Megan

Reference Phone Number *

3862543844

Reference Email *

megan.martin@dbs.fldoe.org

Representation Categories

Applicant must represent ONE (1) of these categories:

Individual who has a disability that uses assistive technology. ▼

Demographics and Skills

Racial and Ethnic Identity

White ▼

Do You Identify As An Individual Who Has a Disability?

Yes ▼

Gender Identity

Male ▼

Age

65 - 74 ▼

Veteran Status

Are you a Veteran?

No 

Additional Information

Availability Monday-Friday Between 9:00 am and 5:00 pm Eastern Time

- ☒ I am available for virtual meetings.
- ☒ I am available to travel for in-person meetings and events.
- ☐ I am not available.

Availability Evenings and Weekends (outside of the window stated above)

- ☒ I am available for virtual meetings.
- ☐ I am available to travel for in-person meetings and events.
- ☐ I am not available.

Committees You Would Like To Be A Part Of

- ☒ Technology and Public Awareness
- ☐ Public Policy and Advocacy & Interagency
- ☐ New Horizon Loan Program
- ☐ Service Delivery

Knowledge

Knowledge of Advocacy

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Business Management

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Clinical Skills (including assistive technology assessments)

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Creating Business Opportunities

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Dedication/Responsiveness

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Educational Development & Delivery

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Emerging Technologies

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Ethical Practices

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Financial Accounting in Nonprofits

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Government Relations

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Grant Management

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Leadership Capability

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Legal Implications for Nonprofits

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Nonprofit Governance

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Organizational Development

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Public Speaking

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Research

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Strong Professional Networks

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Visionary

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Visionary Social Media/Networking

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Board History

Have you previously served on a nonprofit board of directories

No 

Previous Board Experience

.....

Why would you like to serve on the ATAC/FAAST Board

To be able to provide and pass along my vast knowledge, skills, experiences and abilities with regards to access technology and disabilities

This form was created inside of Florida Alliance for Assistive Services and Technology, Inc..

Google Forms

djrisavyjr@gmail.com

SUMMARY

Highly motivated and skilled paraprofessional since 1974 with a wide variety of detailed and proven, formal and informal, computer and communication related skills as a computer operator, college level computer skills instructor, computer hobbyist, emergency communications coordinator/dispatcher and dedicated amateur radio operator. Completed many state-of-the-art computer courses. Utilize a wide range of amateur radio equipment including equipment based on latest computer technologies. Experienced in web-page development and maintenance. Completed extensive formal and on-the-job training as an emergency communications system dispatcher and help-desk operator. Excellent working knowledge and skill-set of all essential computer and communications software such as:

- Windows – Eleven/Ten/Eight/Seven/Vista/2000/XP/98/95/Windows 3.11/DOS
- FTP / HTML
- Outlook email
- Windows Mail ☐
- Thunderbird and Outlook Express
- Firefox, Google Chrome and Microsoft Edge
- Office – 365/2021/2019/2016/2013/2010/2007/2003
- D base plus and Networking Settings

Extensive expertise and knowledge of assistive technology and adaptive computer systems, hardware and software utilized by the disabled, blind or visually impaired and elderly population, including:

- Voice Synthesizers
- Screen Enlargements/Zoom Text/Windows magnifier
- Screen Readers – Jaws/Window-Eyes/NVDA/Narrator
- Braille Printers and Braille Note takers
- OCR -Openbook and Kurzweil
- Apple – iPhone and iPad

EXPERIENCE

June 05, 2017 – Present Rehabilitation Center for the Blind and Visually Impaired
Senior Rehabilitation/Access Technology Instructor Daytona Beach, Florida

- Teach and Instruct people that are blind access technology devices and computers
- Conduct pre/post skills assessments

October 20, 2003 – May 26, 2017 CENTER FOR INDEPENDENT LIVING DISABILITY RESOURCE CENTER,
IL SPECIALIST & Peer Mentor Pensacola, Florida

- Assist people with disabilities in obtaining independence
- Create, update and maintain new consumer service records
- Print and submit consumer service records for filing

December 2002 - March 2003 NEW HORIZONS COMPUTER LEARNING CENTER
EDUCATIONAL CONSULTANT Pensacola, Florida

- Call prospective clients on the telephone and sell company services
- Conduct tours for prospective clients
- Register and schedule clients into computer courses

January 1997 – January 2010 SELF-EMPLOYED
COMPUTER SYSTEMS CONSULTANT

Pensacola, Florida

- Work with visually impaired individuals to develop and Implement adaptive computer systems
- Install and set up computer systems, maintaining and modifying systems' software and hardware as needed
- Taught computer basics and applications for the Blind, visually impaired and disabled
- Designed, developed and maintained the "AdaptAWorld.com" web page

January 1999 - February 1999 INDEPENDENCE FOR THE BLIND
ON-THE-JOB TRAINING--HELP DESK OPERATIONS

Pensacola, Florida

- Processed requests, including detailed information from callers on a multi-line phone system
- Documented and filed all calls using the latest in adaptive computer technology
- Transferred data to appropriate personnel

January 1994 - December 1998 SELF-EMPLOYED--HOME BASED SALES
SALES REPRESENTATIVE

Pensacola, Florida

- Sold a variety of products for several different home-based sales companies such as: Amway Products, and Excel long distance telephone services

January 1988 - December 1991 PENSACOLA JUNIOR COLLEGE
ADJUNCT INSTRUCTOR

Pensacola, Florida

- Taught word processing, data base manipulation and other general entry-level computer technology courses at both the classroom and laboratory levels
- Setup, installed, debugged and maintained computer equipment in the PJC Business Department computer laboratories

January 1986 - July 1986 NAS Pensacola
DISPATCHER

Pensacola, Florida

- Dispatched routine and emergency radio communications for the military security police
- Answered routine and emergency phone calls, assigned officers to those calls, utilized computers to keep
- Detailed logs of all activities, issued and retrieved weapons

August 1983 - January 1984 Florida School for the Deaf and Blind
RECREATION INTERN

St. Augustine, Florida

- Planned, scheduled and implemented recreational activities for the entire school population—including numerous field trips and on-campus events

EDUCATION

- Certified - CompTIA A+ Professional, New Horizons, Technical Education Center, Pensacola, Florida--June 2001
- Specialized Training - Network + and MS Exchange 2000, New Horizons, Tech. Center, --June 2001
- Specialized Training - MS Windows 2000: Implementing and Administering, Designing Directory Services, Network and Operating System Essentials, Supporting Professional and Server, designing a Secure Network, Supporting Network infrastructure, New Horizons, Tech. Center--January 2001
- Specialized Training - Internet Operations, Independence for the Blind, Pensacola, Florida--February 1999
- Certified - Radio Dispatcher, State of Florida, Manderfield Industrial Training Laboratory--June 1985
- Bachelor of Science Florida State University, Tallahassee, Florida, Leisure Services and Studies--December 1983
- Associate of Arts Brevard Community College, Melbourne, Florida--June 1979

AFFILIATIONS/LICENSES

FCC Third Class Radio Dispatch Operator License
Amateur Radio Extra Class Operator License

Amateur Radio Emergency Service
Amateur Radio Relay League

Board Application

Thank you for your interest in becoming a FFAST board member. If you would prefer to fill the application in any other format (Word, Pdf, verbally, etc), please contact us at: Local Phone: (850) 487-3278 Toll-Free 1-844-FL-FAAST (353-2278) Fax: (850) 575-4216 Email: info@faast.org

Preferred Pronoun

She/Her ▼

First Name *

Melissa

Last Name *

Nelms

Contact Number *

850.980.3999

Email Address *

Street

1901 Longview Drive

City

Tallahassee

State

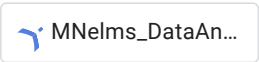
Please enter the State as the two letter abbreviation.

FL

Zip Code

32303

Please Upload Your CV or Resume in PDF Format *



Current Employer *

Contractor - FLD0H - Division of Children's Medical Services - Bureau of Early Steps and Newborn Screening

Employer Contact Number

850.445.4551

Employer Address

2390 Phillips Road

Employer City

Tallahassee

Employer State

Please enter the State as the two letter abbreviation.

FL

Employer Zip Code

32308

Reference First Name *

Marquesas Blimes

Reference Phone Number *

850.590.6421

Reference Email *

marquesasblimes@gmail.com

Representation Categories

Applicant must represent ONE (1) of these categories:

Family member/legal guardian of an individual who has a disability that uses assistive technology. ▼

Demographics and Skills

Racial and Ethnic Identity

White ▼

Do You Identify As An Individual Who Has a Disability?

Yes ▼

Gender Identity

Female ▼

Age

35 - 44 ▼

Veteran Status

Are you a Veteran?

No 

Additional Information

Availability Monday-Friday Between 9:00 am and 5:00 pm Eastern Time

- ☒ I am available for virtual meetings.
- ☐ I am available to travel for in-person meetings and events.
- ☐ I am not available.

Availability Evenings and Weekends (outside of the window stated above)

- ☒ I am available for virtual meetings.
- ☒ I am available to travel for in-person meetings and events.
- ☐ I am not available.

Committees You Would Like To Be A Part Of

- ☒ Technology and Public Awareness
- ☒ Public Policy and Advocacy & Interagency
- ☒ New Horizon Loan Program
- ☒ Service Delivery

Knowledge

Knowledge of Advocacy

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Business Management

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Clinical Skills (including assistive technology assessments)

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Creating Business Opportunities

- ☐ 1
- ☐ 2
- ☒ 3
- ☐ 4
- ☐ 5

Knowledge of Dedication/Responsiveness

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Educational Development & Delivery

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Emerging Technologies

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Ethical Practices

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Financial Accounting in Nonprofits

- ☐ 1
- ☒ 2
- ☐ 3
- ☐ 4
- ☐ 5

Knowledge of Government Relations

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Grant Management

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Leadership Capability

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Legal Implications for Nonprofits

- ☐ 1
- ☐ 2
- ☒ 3
- ☐ 4
- ☐ 5

Knowledge of Nonprofit Governance

- ☐ 1
- ☐ 2
- ☒ 3
- ☐ 4
- ☐ 5

Knowledge of Organizational Development

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Public Speaking

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Research

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☒ 5

Knowledge of Strong Professional Networks

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Visionary

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Knowledge of Visionary Social Media/Networking

- ☐ 1
- ☐ 2
- ☐ 3
- ☒ 4
- ☐ 5

Board History

Have you previously served on a nonprofit board of directories

No 

Previous Board Experience

None.

Why would you like to serve on the ATAC/FAAST Board

I am a mother to a son on the Autism spectrum. I am the wife of a man with OCD and Tourette's. I have severe ADHD myself. These circumstances are not what I would normally lead with to market my professional appeal, but in this case, it's my biggest strength. Loving people with disabilities has allowed me to see the barriers our society has implemented, both with and without intention, to those who have broad or diverse support needs. Serving on the ATAC/FAAST Board would allow me the opportunity to apply, not only the professional skills highlighted on my resume, but also the passion for advocacy and equity I have gained through my lived experience. It would be a privilege to be involved with an organization that is already doing so much to bring my hopes for a better world to fruition.

This form was created inside of Florida Alliance for Assistive Services and Technology, Inc..

Google Forms

MELISSA NELMS, MPH

M.Nelms10@gmail.com | (850)980-3999 | Tallahassee, FL 32303

PROFESSIONAL SUMMARY

Public health systems and data analyst consistently recognized for success in planning, communication, and operational improvements. Experience in data analysis, requirements gathering, system implementation, issue triage, troubleshooting, and user acceptance testing.

SKILLS

- Systems analysis and design
- Requirements solicitation
- Quality Assurance
- User Acceptance testing
- End-user training
- Client Needs Assessment
- Community Resources
- Issue Resolution
- Data Analysis and Stewardship
- Project management
- Regulatory compliance
- Stakeholder management
- Requirements Traceability
- Data Stewardship and Analysis

WORK HISTORY

April 2021 – Current

Lead Business Analyst

State of Florida Department of Health - ESSO - Tallahassee, FL

- Assist the Early Steps Program administration within the FL-DOH with the full lifecycle of procurement, development, and testing of a modern data system
- Facilitate and document daily meetings with the vendor and project team
- Identify and communicate Business needs to the vendor
- Reconcile system design, requirements, and enhancements in an RTM.
- Create and maintain the project RAID log for both system and project items.
- Assist the Business and PM with preparing the procurements for the Solution vendor and IV&V vendor.

Lead Data Analyst

Eyes Inc. of New Jersey
NPO Grant – BRAVE Project

- Assist a Non-Profit Organization with the data collection, analysis, and reporting to a federal funding source (HRSA)
- Create SOPs and provide training for data collection
- Develop, run, and maintain SAS Programs for analysis and transformation of data into required formats
- Prepare reports, metrics, and monthly deliverables for internal quality control use

Business Analyst

State of Florida Department of
Agriculture - FNW - Tallahassee,
FL

- Manage user and internal acceptance testing for a statewide web application implementation.
- Coordinate and conduct user acceptance testing and end user training.
- Identify system defects and coordinate with vendor for reconciliation.
- Work with vendors and stakeholders to elicit, document and manage requirements.
- Data set cleanup and overall data quality improvement for both existing and incoming data.
- Create testing artifacts including business cases, test data, test scripts and issue logs.
- Validate system requirements are met in UAT, PROD, and Training environments.
- Record system defects and ticket closures within Visual Studio.
- Assist and monitor vendor server access meetings.

Program Coordinator

Capital Area Healthy Start
Coalition - Tallahassee, FL

- Research statistics and prepare case studies for the Fetal and Infant Mortality Review program across North Florida.
- Collaborate with internal and external stakeholders to determine requirements for data used in policy decisions.
- Host focus groups of MCH professionals. Gather and assess data on services offered to high risk expectant mothers bereaved families.
- Use focus group feedback and DOH statistics make "Healthy Start" policy recommendations.
- Coordinate and maintain legal documents, certifications, and professional relationships according to HIPPA regulations.

Applications Support Analyst

State of Florida Department of
Agriculture - FNW - Tallahassee,
FL

- Manage user and internal acceptance testing for a statewide web application implementation.
- Coordinate and conduct user acceptance testing and end user training.
- Identify system defects and coordinate with vendor for reconciliation.
- Work with vendors and stakeholders to elicit, document and manage requirements.
- Data set cleanup and overall data quality improvement for both existing and incoming data.
- Create testing artifacts including business cases, test data, test scripts and issue logs.

EDUCATION

12/2023

Master of Business Administration: Data Analytics

Florida Gulf Coast University | Fort Myers, FL

05/2013

Master of Public Health: Health Policy

Florida State University | Tallahassee, FL

08/2010

Bachelor of Science: Nutrition and Food Science

Middle Tennessee State University | Murfreesboro, TN

12/2007

Some College: Exercise and Sport Science

Brigham Young University - Hawaii | La'ie, HI

Board Application

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Preferred Pronoun

She/Her



First Name *

Alyssa

Last Name *

Caselnova

Contact Number *

9895511194

Email Address *

akociba3@gmail.com

Street

27031 Bentley Way Unit 208

City

Wesley Chapel

State


Please enter the State as the two letter abbreviation.

FL

Zip Code

33544

Please Upload Your CV or Resume in PDF Format *

 Resume- A Kocib...

Current Employer *

James A. Haley Veterans Hospital

Employer Contact Number

813-972-2000

Employer Address

13000 Bruce B. Downs Blvd

Employer City

Tampa

Employer State

Please enter the State as the two letter abbreviation.

FL

Employer Zip Code

33612

Reference First Name *

Geoff

Reference Phone Number *

813-972-2000 x6583

Reference Email *

geoff.hopkins@va.gov

Representation Categories

Applicant must represent ONE (1) of these categories:

A representative of a Florida State Agency.



Demographics and Skills

Racial and Ethnic Identity

White



Do You Identify As An Individual Who Has a Disability?

No



Gender Identity

Female



Age

25 - 34



Veteran Status

Are you a Veteran?

No



Additional Information

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Knowledge of Organizational Development

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Knowledge of Research

☐ 1☒ 2☐ 3☐ 4☐ 5

Knowledge of Strong Professional Networks

☐ 1☐ 2☒ 3☐ 4☐ 5

Knowledge of Visionary

☐ 1☐ 2☒ 3☐ 4☐ 5

Knowledge of Visionary Social Media/Networking

☐ 1☒ 2☐ 3☐ 4☐ 5

Board History

Have you previously served on a nonprofit board of directories

No



Previous Board Experience

I do not have any previous Board Experience

Why would you like to serve on the ATAC/FAAST Board

I would like to serve on the ATAC/FAAST to bring my knowledge of the VA and its process with Adaptive Recreation equipment to the organization. I also feel like this would be a good learning experience for me as well.

This form was created inside of Florida Alliance for Assistive Services and Technology, Inc..

Google Forms

Alyssa Kociba, CTRS

27031 Bentley Way Unit 208 | Wesley Chapel, FL 33544 | 989-551-1194 | akociba3@gmail.com

EDUCATION:

Central Michigan University, Mt. Pleasant, MI

Bachelor of Science

Major: Recreation, Parks, and Leisure Service Administration

Concentration: *Therapeutic Recreation*

Minor: Substance Abuse Education: Prevention, Intervention, and Treatment

GPA: 3.80

Graduation: May 2017, *Magna Cum Laude*

PROFESSIONAL EXPERIENCE:

James A. Haley VA Hospital

Tampa, FL

Recreation Therapist-Full Time (GS-11)

May 2017- Present

- Currently serving as the Adaptive Sports coordinator for the Adaptive Sports program under Physical Medicine and Rehabilitation Service. This includes organizing and hosting Adaptive Sports and Recreation programs for Veterans and trialing and recommending adaptive equipment.
- Previously provided Recreation Therapy services on Polytrauma Unit, serving Brain Injury, Stroke and orthopedic injury populations
- Previously provided Recreation Therapy services in the Polytrauma Transitional Rehabilitation Program, serving primarily brain injury and stroke populations in transitional care to promote independence
- Active participant in interdisciplinary rehabilitation team, working with various team members (SLP, OT, PT, Psychology) to best serve patients and provide top level care
- Receive consults in a timely manner by completing a thorough assessment and working with client to identify rehabilitation and leisure goals
- Implement individual and group therapy sessions to address client's rehabilitation and leisure goals
- Complete discharge notes, identifying status of goals and recommendations, in a timely matter once client's goals are met or client is discharged from hospital
- Communicate with clients, family members, and rehabilitation team regarding progress, treatment plan and resources/opportunities
- Serve as "Telehealth Champion" for Recreation Therapy service
- Participate in and assist with various Adaptive Sports clinics, including, kayaking, golf, boccia, archery, and cycling
- Assist Adaptive Sports Coordinator with cycling program, including endurance training program, evaluations, and recommendations via prosthetics request
- Complete outpatient evaluation for Adaptive Sports program, including evaluating, establishing goals and recommending adaptive recreation equipment
- Served as a coach for the National Veterans Golden Age Games from 2019-2022, including traveling 2 years for the NVGAG
- Currently serving as a coach for the National Veterans Wheelchair Games, traveling to games 2 years to date
- Schedule, organize and facilitate clinics and practices for National Adaptive Sports Program participants
- Work with community partners for scheduling and hosting programs to best serve clients

James A. Haley VA Hospital

Tampa, FL

Recreation Therapy Intern

January-April 2017

- Completed 15-week, Full-Time internship to fulfill NCTRC requirement
- Interned in the Polytrauma Transitional Rehabilitation Program
- Provided Recreation Therapy services to brain injury and stroke clients under the supervision of CTRS

- Was an active participant in the interdisciplinary treatment team
- Shadowed each Recreation Therapist within the James A. Haley department to expand knowledge of various populations and Recreation Therapy's role with each population

CERTIFICATIONS, WORKSHOPS, AND TRAININGS:

Adaptive Air Rifle Training & Workshop <i>Move United & All People's Life Center</i>	June, 2022
Wheelchair Tennis Coach Development Workshop <i>United States Tennis Association & Move United</i>	February, 2020
USAWFL (USA Wheelchair Football League) Skills & Drills Clinic Series <i>Move United</i>	July-August, 2020
Certified Adaptive Recreation & Sports Specialist (CARSS-1) <i>Blaze Sports America</i>	October 28, 2020
Adaptive Golf Coach Workshop <i>Adaptive Golf Association</i>	November, 2019
Yellow Belt Certified <i>Lean Six Sigma</i>	September, 2019
Certified Therapeutic Recreation Specialist <i>National Council for Therapeutic Recreation Certification</i>	June 20, 2017

APR Business Advice

Mark Raciappa, Certified DiSC Practitioner
2840 Remington Green Circle, Suite 21
Tallahassee, FL 32308
Main: (850) 597-6627

markraciappa@gmail.com

Mr. Eric Reed
FAAST
2145 Delta Blvd., Ste. 200
Tallahassee, FL 32303

August 14, 2023

Dear Eric:

Thank you for the invitation to submit a proposal for the creation of your organization's 2-year strategic plan. I have worked as a coach and business advisor for the past 17 years and have served over 500 businesses in 79 different industries. My methodology is two-fold: assist my clients in the creation of a meaningful plan, then follow-up to ensure implementation.

I did review your current plan as presented and, based on our conversation, submit the following for your consideration:

I provide materials for and facilitate two (2) 2-hour planning sessions on Zoom (dates TBD). I suggest a SWOT analysis and will supplement with other planning/goal-setting materials as needed. Following those sessions I will compile the various inputs to produce an executable plan complete with goals, strategies and timelines. We will then hold a 1-hour plan review session (date TBD) via Zoom to assure clarity. From my experience, the best results are obtained from follow-up during implementation period and I'm suggesting two alternatives as well.

My fee for planning sessions, plan construction and review session is \$1,750.

Optional accountability schedule #1 (1 hour monthly for 2 years) \$7,200.

Optional accountability schedule #2 (1 hour quarterly for 2 years) \$2,400.

Thanks for your consideration. I look forward to working with you and your Board.

Yours in abundance,



**Response to Request for Planning Assistance for Wise Planning Assistance
For Eric Reed, FFAST Florida Alliance for Assistive Services and Technologies (Client)
by Mark D. Bennett, Principal, Uniting by Design LLC (Consultant), July 2023**

QUOTATION

Scope of work

- Observations about current strategic plan and FY23 QTR3 Strategic Plan 2020 Report
 - The current plan is comprehensive, extensively analyzed and explained, and has been successfully implemented.
 - When an organization has already worked with a consultant who has delivered a successful plan, it is often most efficient to work with the same person, if he or she is available.
 - If you want to limit the cost and level of effort invested in the new strategic plan, you can be most efficient if you use the current plan as a framework and stress test its continued relevance to the current situation and emerging future.
 - It is important to carefully prepare before bringing the current planning participants together. Some elements of the current plan may be able to be affirmed and accepted without much if any time needed from the planning participants. For example,
 - Are the statements of values and principles accurate and well stated?
 - Is the mission statement unchanged, clear, and well stated?
 - How have the organization's strengths, weaknesses, opportunities and threats changed?
 - Can the PEST and TOWS analyses be used for framing goals and objectives with only a modest investment of time to review them?
- Meet with Executive Director and Board/Council Chair to discuss preparation checklist, identify preparation tasks, and set a schedule to assure readiness for the planning meeting. Determine scope of online preparation and onsite deliberation by planning team. Consider whether large planning team will develop the strategies/action plan or will stop with Goals and Objectives, leaving action planning to the executive director and staff with operational responsibilities. (1 hr)
- Conduct pre-meeting survey (or interviews) to gather useful feedback from stakeholders to assist planning participants with their work. TBD based on number of people and scope of effort. Estimate for survey (6 hrs). If interviews are preferred, estimate 45 minutes/interview times # of interviews.
- Work with Client representative(s) to support their preparation of a current situation analysis that informs the planning participants as they develop a new plan. This situation analysis includes an assessment of the previous strategic plan (accomplishments, unfinished work, and lessons learned), relevant information about important trends** that affect the organization's mission space, and themes identified in the pre-meeting survey. (3 hrs) ***There is often excellent analysis of trends available from national organizations that can be summarized for use by the planning participants. Also, when an organization's mission has a significant connection with technology delivery, rapid changes and forecasts for relevant technology must be considered for strategic success.*
- Consideration should be given to efficient meeting design (overall number of hours needed, length of meetings, and time of day) that assure a high level of participation and a high level of attention and energy that generates solid strategic thinking. Generally, I suggest meetings of 2-4 hours, scheduled 1-2 weeks apart. Until the scope of work has been determined, the exact number of meeting contact hours is not knowable. Estimate (8 hours) divided into a series of meetings that accommodate the needs of planning participants. Client provides a meeting notetaker to capture comprehensive notes.

- Client will determine whether meetings of the planning team will be virtual or hybrid. Consultant will participate via zoom and Client will supply necessary technology for quality video and audio connection with planning participants.
- Prepare a report of the meeting that includes key discussion points and conclusions, consultant recommendations, and follow up tasks to complete the plan document. (4 hours)
- Final review of proposed plan with ED and any other key people, e.g. Board/Council Chair, Executive Committee. Formal presentation of plan to Board for approval. (2 hrs)
- Possible schedule:
 - September – Preparation, gathering information, and receiving feedback from stakeholders
 - September – Work with participants online to use feedback, develop ideas, and assess operating environment (Situation Analysis)
 - October - Meet all together (online or in-person) (options full day or two half days)
 - November – Final report and plan document to present to Board

Cost: Professional Fee. In the nonprofit sector due to the wide range of size and capacity of organizations, I work on a sliding scale of \$200-300/hour. At \$200/hour, I estimate the total to be \$4,800. Once the scope of work is determined the contract amount will be fixed. Client provides meeting venue and covers any onsite costs.

SUMMARY OF QUALIFICATIONS Mark D. Bennett

Value Proposition: I bring substantial complementary expertise to my work as an experienced facilitator of wise, strategic planning. This work includes a wide range of clients in the private, public, and nonprofit sectors. I am the coauthor of *A Field Guide to Good Decisions: Values in Action* and have taught thousands of leaders, board members, and managers in the US and worldwide about values-based decision making, a practical approach to dialogue about core values and key decisions. The linkage of guiding values and action principles with strategy is particularly important for operating nonprofit organizations to develop a wise, strategic plan that demonstrates accountability to its public stakeholders, maintains credibility, and earns trust.

Although FFAST is not a typical coalition, it does have representatives of independent organizations in its governance structure. I have extensive experience with the issues and concerns of coalitions, alliances, and partnerships among independent organizations. Wise, strategic planning at its best generates unity for the organization. For public bodies and organizations with important community stakeholders, I have designed outreach and participation strategies to bring meaningful input from affected stakeholders into the planning process. I am the author of *Uniting by Design: the Architecture of Creative Collaboration*, a practical guide for leaders to build healthy, collaborative organizations.

As a professional mediator for over 25 years, a teacher of practical mediation skills, and coauthor of *The Art of Mediation*, I have a deep understanding of the skills necessary to help individuals and groups come together, bridge their differences, and reach durable agreements. These skills may be useful if participants have serious differences about planning priorities.

Client will gain capacity for future, successful planning work together. All participants will receive a detailed wise planning workbook with a *blueprint* that orients everyone to a common framework and fully explains each element of a wise strategic plan. The planning sessions will be designed for high participation that strengthens the organization's future capacity for meaningful dialogue and collaboration.

APPROACH

*Alone we can do so little.
Together we can do so much.*
Helen Keller Social visionary

Wise strategic planning is a cornerstone practice of healthy, adaptive organizations. Planning together provides a valuable opportunity for the organization to step back, envision its desired future, think through the challenges that lie ahead, and develop a strong consensus with shared commitment to execute the plan.

Coalitions, alliances, and partnerships among independent organizations, need a shared strategic framework that unifies them and aligns their separate efforts over time. The scope of the strategic framework may be less detailed than an individual organization's strategic plan. However, it will contain the same basic elements.

Clear mission focus, an inspiring, shared vision (usually 2-3 years), well-defined guiding values and principles, meaningful goals, clear success indicators, and detailed objectives and actions with responsibility and deadlines, are the essential parts of a wise plan. With this common framework, the organization's constituent members and key stakeholders are better able to:

- maintain a strong internal consensus about strategic direction;
- leverage limited resources and prioritize effort to increase mission impact;
- promote collaboration, generate broad support, and assure successful execution; and
- become more adaptable and able to navigate challenges in the operating environment.

Wise planning begins with the WHY of mission, values, and guiding principles and reexamines these foundation components when necessary.

Then, the strategic conversation must develop a good understanding of the external operating environment and a healthy regard for the uncertainties. This requires a dialogue among diverse perspectives to carefully consider the needs, concerns, and aspirations of the organization's community stakeholders.

Strategic thinking converts this understanding into intelligent action with the shared commitment to execute the plan with courage and creativity.

*Vision without action is merely a dream.
Action without vision just passes the time.
Vision with action can change the world.*
Joel Barker Futurist

Many "strategic" planning efforts do not live up the name because the emphasis is on *the plan*. Wise planning emphasizes a dynamic, ongoing process of strategic conversation. The plan should not be understood as the end of the process. Too often, a strategic plan document sits on a shelf, only occasionally referenced. The planning must produce a *living plan* that functions like a high-quality *road map*. It is always available, regularly reviewed, and, when necessary, updated and modified. To be strategic, planning must intelligently anticipate the challenging realities of the organization's current and near-future environment. To be wise, planners must also discern the best way to honor the mission, integrate strategy, goals, and action with guiding values and principles, respect the needs and concerns of stakeholders, and creatively leverage limited resources. Too often, *strategic* planning processes are poorly designed and half-heartedly executed. Strategy is about selection of a small set of priorities that unify the organization so it can focus effort and increase leverage to

move the mission forward.

A planning team should prepare well to avoid three common mistakes.

Poor Design A sound planning approach begins with honest assessment of the key elements of the organization's current plan. Some planning starts with a 'blank page.' However, a new plan may build upon previous work that provides a sound foundation.

- Assess the need, scope of the effort, and **level of commitment** by leadership.
- Identify **necessary participants** and others to be consulted.
- Assemble the **resources needed** to implement an effective planning process.

Absence of Key Perspectives Wise planning requires thorough consideration of a range of issues and important values. A candid, 360° discussion is of fundamental importance. The right people with diverse perspectives need to be in the physical or virtual room (or consulted in a meaningful way) AND feel safe enough to express themselves. Wise planning depends upon practical foresight about what is coming and collective wisdom about what to do.

- Include **diverse perspectives** to eliminate blind spots, test assumptions about current plans, and determine HOW the organization should move into the future.
- Consider the value of soliciting targeted **input from stakeholders** who do not participate directly through survey, individual interview, focus group, or questionnaire.
- Develop a thoughtful agenda and use guidelines for discussion that establish a safe, **respectful climate for dialogue** and creative exploration.

Flawed Execution Beautifully written plans sometimes sit on a shelf. The planning process requires clarity about HOW the plan will be executed. The execution process must include review, assessment, and modification as needed to address changes in the operating environment and keep moving toward the desired outcomes. Commitment must be firm.

- Establish useful **success indicators** and determine how you will develop the information needed to assess progress.
- Update a **"blueprint," "dashboard," "scorecard,"** or other structured review document periodically to inform participants and other important stakeholders of the plan goals, indicators, and progress. Communication is necessary to establish accountability.
- Schedule **periodic reviews** to monitor the effectiveness of the plan and allow sufficient time for discussion and course correction.

*The essence of strategy is choosing what not to do....
Strategy 101 is about choices. You can't be all things to all people.*
Michael Porter leading international authority on strategy

EXAMPLES OF PROJECT EXPERTISE

FACIL (Florida Association of Centers for Independent Living)

- Developed three-year strategic plan with Executive Director and board
- Jane Johnson, Executive Director jane@floridacils.org

Center for Independent Living, North Central Florida

- Developed three-year strategic plan with involvement from staff and board

- Reviewed and updated original plan after three years
- Tony Delisle, Executive Director tdeslisle@cilncf.org

New Mexico Coalition Against Domestic Violence

- For over a decade, worked with statewide coalition of domestic violence shelters and advocates in planning and decision making at all levels: strategic planning for individual member organizations; the coalition board of directors; and internal task forces making key decisions on policy and priorities.
- Pam Wiseman, Executive Director pwiseman@nmcadv.org

New Mexico Access to Justice Commission

- Facilitation of Strategic Planning process for large alliance (30+) of civil legal justice organizations and advocates over several years
- Grace Spulak, Staff Director gspulak@gmail.com

New Mexico Conservation Coalition and Environment Alliance of New Mexico

- Facilitation of development of a coalition of independent environmental nonprofits to build a collaborative operating structure and plan their shared strategies to promote legislation and governmental policy.
- Demis Foster, Executive Director, Conservation Voters New Mexico, demis@cvnm.org



2024 ATAC Officer Elections Ballot

Chair

Brian Nerland

Vice Chair

Betsy Burgos

Sarah Goldman

Janet Good

Eddie Hall

Thomas Moon

Treasurer/Secretary

Kailey Medlock

State Representative

Sarah Goldman

Kristi Warren



At Large Member

Horace Brown

Betsy Burgos

Enrique Escallon

Sarah Goldman

Eddie Hall

Thomas Moon

Brandon Palermo

Angel Perez

Kristi Warren

Executive Committee Elections

The ATAC has five members of the Executive Committee that are elected by the full ATAC at the QTR 4 meeting: Chair, Vice Chair, Treasurer/Secretary, State Representative, and At Large Member. (Descriptions of these position can be found in the Bylaws.) The process for electing Executive Committee members is as follows:

60 days before the QTR 4 ATAC meeting, ATAC members are sent a nominations survey. This survey asks each member to nominate eligible members to their recommended position. (Member eligibility can be found in the Bylaws).

Once the survey has been closed, each member nominated for a position is asked to confirm their nomination. If they accept the nomination, their name is added to the “Slate of Elections”. If they decline the nomination, they are thanked for their consideration and no further action is taken. If they do not respond to the confirmation, their name is added to the “Slate”, with a note that they have not confirmed.

The “Slate” is then sent to the ATAC with the meeting materials one week before the QTR 4 meeting. The elections are held as the final agenda item for the QTR 4 meeting.

Elected Executive Committee members begin their term immediately following the meeting, unless the ATAC votes on an alternative start date.