



STATE COLLEGE OF FLORIDASM
MANATEE - SARASOTA

DISTRICT BOARD OF TRUSTEES

SCF Mission:

State College of Florida, Manatee-Sarasota, guided by measurable standards of institutional excellence, provides engaging and accessible learning environments that result in student success and community prosperity.

SCF Vision:

State College of Florida, Manatee-Sarasota is the region's first choice for innovative, responsive, quality education, workforce training and community partnership.

SCF Values:

Integrity. We have a tradition of delivering our promises responsibly and transparently.

Collaboration. SCF is boldly engaging our partners to achieve the dynamic future we envision.

Innovation. We define best practices and create opportunity with forethought.

Inclusivity. SCF is an open access institution where all are welcomed and supported as part of the SCF college community.

<p>AGENDA</p> <p>The District Board of Trustees</p> <p>State College of Florida, Manatee - Sarasota</p> <p>Regular Meeting</p> <p>SCF Bradenton – Board of Trustee Room 7/160</p> <p>December 10, 2024 5:30 pm</p>

1. **Meeting Call to Order – Mr. Thomson**
2. **Invocation and Pledge of Allegiance - Dr. Fritch**
3. **Public Comment - Mr. Thomson**
4. **President’s Report - President Gregory**

SCF Mission Moment: SCFCS Update - Ms. Kelly Monod, AVP Collegiate Schools

5. Approval of Non-Financial Consent Agenda Items (“Consent Agenda A”)

Exhibit A:	Minutes of October 29, 2024 BOT Meeting - Page 5
Exhibit B:	Curriculum Revision (CDR) December 2024 - Page 8
Exhibit C:	HR Personnel Actions Monthly Report October 2024 - Page 10
Exhibit D:	SCFCS Out of Country Travel Requests - Page 11

6. Approval of Financial Consent Agenda Items (“Consent Agenda B”)

Exhibit E:	Monthly Financial Report Sept 2024 - Page 26
Exhibit F:	Budget Amendment FY 2024-25 Sept. 2024 #9- 12 - Page 32
Exhibit G:	SCFCS Financial Report(s) Sept. 2024 - Page 36
Exhibit H:	Acceptance of Gifts and Grants Sept. 2024 - Page 38
Exhibit I:	Monthly Financial Report Oct. 2024 - Page 39
Exhibit J:	Budget Amendment FY 2024-25 Oct. 2024 #13-15 - Page 44
Exhibit K:	SCFCS Financial Report(s) Oct. 2024 - Page 47
Exhibit L:	Acceptance of Gifts and Grants Oct. 2024 - Page 49
Exhibit M:	Property Disposals - Page 50
Exhibit N:	Grant No. 24-13 Strengthening Community College Round 5 - Page 51
Exhibit O:	Grant No. 24-14 Linking Industry to Nursing Education - Page 53
Exhibit P:	Grant No. 24-15 Perkins CTE Equipment Upgrade – Engineering Technology - Page 55
Exhibit Q:	Grant No. 24-16 Perkins CTE Equipment Upgrade – Photographic Technology - Page 57
Exhibit R:	Grant No. 24-17 Carl D. Perkins 2024-25 Roll Forward Allocation Page 59

7. Facilities Project List (Informational Only) - Julie Jakway

Exhibit S: Project List - Page 61

8. Facilities

Construction Projects & Updates – Chris Wellman

Exhibit T: Hurricane Recovery Project Update - Page 62

Exhibit U: Miscellaneous Capital Projects - Page 63

9. Rule for Final Action - Steve Prouty

Exhibit V: Retirement Enhancement Plan (REP) No. 6HX14-2.41 - Page 64

10. SCF Foundation Update - Cassandra Holmes

11. Old Business

12. New Business

13. Board Adjournment

MINUTES**THE DISTRICT BOARD OF TRUSTEES -- STATE COLLEGE OF FLORIDA, MANATEE – SARASOTA
REGULAR MEETING**

Date: October 29, 2024 5:30 p.m.**Location:** SCF Bradenton**Proceedings:**

The District Board of Trustees of State College of Florida, Manatee – Sarasota held a Regular Meeting on October 29, 2024 at SCF Bradenton.

Board Members Present: Rod Thomson, Taylor Collins, Jaime DiDomenico, Mike Fuller, Mark Goodson, Ryan Moore, and Britt Riner.

Administrators Present: President Tommy Gregory, Vice Presidents Dr. Todd Fritch, Dr. Ryan Hale, Julie Jakway, and Dr. Brittany Nielsen **Absent:** Steve Prouty.

1. Meeting Call to Order - Mr. Thomson

Mr. Thomson called the meeting to order at 5:30 pm.

2. Invocation and Pledge of Allegiance

Dr. Nielsen delivered the invocation and led the pledge.

3. Public Comment

None

4. President's Report

President Gregory reflected on finishing three hurricanes in his first 100 days, lessons learned and appreciation for everyone that worked behind the scenes. The President shared with the Board several upcoming student performances and encouraged the Trustees to attend a show. President Gregory highlighted the efforts of Cassandra Holmes and her team in successfully raising \$435,000 toward the Linking Industry to Nursing Education (LINE) Fund, funds that the State matches.

Enrollment Report - Dr. Ryan Hale and Dr. Brittany Nielsen

Dr. Hale presented to the Board a review of SCF Enrollment trends with a focus on Spring 2024. Dr. Nielsen's presentation focused on the Fall 2024 SCF student profile and student support services.

5. Parrish Schematic Design - Peter Hepner, Hepner Architects

Mr. Hepner made a presentation on the SCF Parrish Phase One Development.

Mr. Goodson made a motion to proceed with the design as presented, Mr. Moore seconded, and the Board unanimously approved.

6. Approval of Non-Financial Consent Agenda Items (Consent Agenda A)

Exhibit A:	Minutes of September 24, 2024 BOT Meeting - Page 5
Exhibit B:	Amended Fall 2024 Lifelong Learning & Workforce Development Schedule - Page 9
Exhibit C:	HR Personnel Actions Monthly Report September 2024 - Page 13
Exhibit D:	SCFCS Annual School Improvement Plans - Page 14
Exhibit E:	Annual SCFCS Bradenton Y.E. 6/30/24 Financial Audit - Page 57
Exhibit F:	Annual SCFCS Venice Y.E. 6/30/24 Financial Audit - Page 95

After due discussion and consideration, Mr. Fuller motioned to approve the Non-Financial Consent Agenda, Mr. Moore seconded, and the Board unanimously approved.

7. Approval of Financial Consent Agenda Items (Consent Agenda B)

Exhibit G:	Monthly Financial Report July 2024 - Page 133
Exhibit H:	Budget Amendment FY 2024-25 July 2024 #1-3 - Page 138
Exhibit I:	SCFCS Financial Report(s) July 2024 - Page 141
Exhibit J:	Acceptance of Gifts and Grants July 2024 - Page 143
Exhibit K:	Monthly Financial Report August 2024 - Page 144
Exhibit L:	Budget Amendment FY 2024-25 August 2024 #4-8 Page 149
Exhibit M:	SCFCS Financial Report(s) June 2024 - Page 154
Exhibit N:	Acceptance of Gifts and Grants June 2024 - Page 156
Exhibit O:	Property Disposals - Page 157
Exhibit P:	Grant No. 24-12 Student Support Services, a TRIO Program - Page 160

After due discussion and consideration, Mr. Goodson motioned to approve the Financial Consent Agenda, Mr. DiDomenico seconded, and the Board unanimously approved.

8. Facilities Project List (informational Only) - Julie Jakway

Exhibit Q: Project List - Page 162

9. Facilities

Construction Projects & Updates – Chris Wellman

Exhibit R: Hurricane Recovery Project - Page 163

Mr. Wellman pictures of Hurricane Milton damages shared with the Board. Mr. Wellman requested Board approval for the use of capital reserves to address Hurricane Milton damages, not to exceed six million dollars. After due discussion and consideration, Mr. Goodson motioned to approve Exhibit R, Mr. Moore seconded, and the Board unanimously approved.

Exhibit S: Contractor Pre-Qualification - Page 164

Mr. Wellman requested Board approval of the 2024-2025 Pre-Qualified Contractor list.

After due discussion and consideration, Mr. Moore motioned to approve Exhibit S, Mr. Fuller seconded, and the Board unanimously approved.

10. Synopsis of pending Rule Revisions - Julie Jakway

Exhibit T: Retirement Enhancement Plan (REP) Rule No. 6HX14-2.41 - Page 166

Ms. Jakway shared with the Board a first look at the revisions to the Retirement Enhancement Plan rule. Ms. Jakway explained this is an amendment to SCF’s Retirement Enhancement Plan that is required because of the new statute that places the College on the State Health Insurance plan. The rule will be back in December for action.

11. Old Business

None

12. New Business

• **2024 Gen Ed Review - Dr. Todd Fritch**

Dr. Fritch presented to the Board the General Education Curriculum Revisions as required by the State. After due discussion and consideration, Mr. Fuller motioned to approve the CDR, Ms. Riner seconded, and the Board unanimously approved.

Ms. Holmes provided the Board of Trustees with a brief SCF Foundation update. Ms. Holmes highlighted the generous support of the SCFF Disaster Relief Fund. Ms. Holmes reported that so far, the Fund has been able to help thirty-one (31) individuals, students, and employees, in need.

13. Board Comments/Updates & Adjournment

Mr. Goodson gave KUDOs to the SCF nursing staff and students who worked around the clock at Manatee Memorial Hospital providing exceptional care during the hurricane.

Mr. Moore gave praise to all who helped to open the campus so quickly after the hurricane. In addition, Mr. Moore praised SCF's Athletic Director, Nick Cichielo, for his leadership and the accomplishments of SCF's athletes. Mr. Moore also advocated for an SCF Student Wellness/Fitness Center.

Mr. Fuller expressed his excitement for the SCF Parrish Campus.

Mr. DiDomenico shared that he was looking forward to working with the Board and SCF Leadership.

Ms. Riner thanked SCF Leadership for their time meeting with her and answering all her questions.

Ms. Collins gave KUDOs to the SCF Collegiate School and Kelly Monod for her leadership.

Mr. Thomson commended the nursing staff at Sarasota Memorial Hospital, many of which are SCF graduates for their outstanding care.

The meeting was adjourned at 6:55 p.m.

Rod Thomson, Chair, Board of Trustees

Tommy Gregory, Secretary, Board of Trustees

**RECOMMENDATION TO
STATE COLLEGE OF FLORIDA
MANATEE-SARASOTA
DISTRICT BOARD OF TRUSTEES**

Title: Curriculum Revision

Background:

To ensure that the requirements are current and responsive to student needs, the Curriculum Development and Review Committee has acted on requests from various departments to revise selected courses and programs, and to establish new courses and programs.

Objective:

To approve actions of the Curriculum Development and Review Committee and the recommendations of the President to manage curriculum changes as necessary.

Legal Authority:

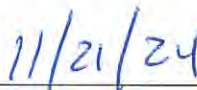
Rule 6HX14-1.07 Responsibility and Authority of the President

Recommendation:

The President recommends that the Board of Trustees approve the recommendations of the Curriculum Development and Review Committee to establish/revise/delete programs and courses as described. (See Attachment)

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\_\_\_\_\_  
*Executive Vice President & Provost*

  
\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*President*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Chair, District Board of Trustees*

\_\_\_\_\_  
*Date*



**PROGRAMS: NEW, REVISED, DELETED**

**Programs: New**

Cybersecurity Analyst .....Certificate

**Programs: Revised**

A.S. Health Services Management [2048] .....Revise Program Requirements  
A.S. Occupational Therapy Assistant [2020] .....Revise Program Requirements  
Certificate, Health Care Services [3039] .....Revise Program Requirements

**Programs: Deleted**

Construction Management Technology Articulated [1739] ..... A.S.

**COURSES: NEW, REVISED, DELETED**

**Courses: New**

HSM 2949 Internship in Health Services Management ..... (3) A.S.  
OTH 1853L Fieldwork Level I A ..... (1) A.S.  
OTH 1854L Fieldwork Level I B ..... (1) A.S.  
OTH 1855L Fieldwork Level I C ..... (1) A.S.

**Courses: Revised**

HSA 3430 Health Care Economics (3) (B.A.S.) ..... Revised Course description, Student Learning Outcomes  
OTH 1001C Intro to Occupational Therapy (3) (A.S.) .....Revised corequisites, Student Learning Outcomes  
OTH 1012C Understanding Screening & Assessment in OT Practice (2) (A.S.) .....Revised corequisites, Student Learning Outcomes  
OTH 1014C Functional Anatomy & Kinesiology (5) (A.S.).....Revised corequisites, Student Learning Outcomes  
OTH 1114C Occupational Therapy Skill & Techniques I (4) (A.S.) .....Revised Pre/corequisites, Student Learning Outcomes  
OTH 1410 Intro to Human Disease (3) (A.S.) .....Revised corequisites, Student Learning Outcomes  
OTH 1520C Occupational Therapy During the Growing Years (5) (A.S.) ..... Revised Course description, Pre/corequisites,  
..... Student Learning Outcomes  
OTH 2261C Occupational Therapy Skills & Techniques II (4) (A.S.) .....Revised Pre/corequisites, Student Learning Outcomes  
OTH 2300C Occupational Therapy in Mental Health (4) (A.S.).....(3) credits to (4), Revised Course description, Pre/corequisites,  
..... Student Learning Outcomes  
OTH 2420C Physical Rehabilitation in Occupational Therapy (3) (A.S.) .....Revised corequisites, Student Learning Outcomes  
OTH 2840L Fieldwork Level II A (5) (A.S.) ..... Revised course title, Student Learning Outcomes  
OTH 2841L Fieldwork Level II B (5) (A.S.) ..... Revised course title, Student Learning Outcomes  
OTH 2933C Leadership & Management (2) (A.S.) ..... Revised course title, Pre/corequisites, Student Learning Outcomes

**Courses: Deleted**

OTH 2802L Occupational Therapy Practicum ..... (4) A.S.

**State Common Course Numbering System Changes (SCNS) – Information Item**

**(None)**

## Human Resources Office Personnel Actions Board Exhibits: October 2024

| <u>Name</u>                | <u>Effective Date</u> |      |  | <u>Classification</u> | <u>Classification Title</u>                                                       | <u>Department</u>                           | <u>Site</u>    |
|----------------------------|-----------------------|------|--|-----------------------|-----------------------------------------------------------------------------------|---------------------------------------------|----------------|
| <b><u>Appointments</u></b> |                       |      |  |                       |                                                                                   |                                             |                |
| Jann Keller                | 10/02/2024            |      |  | Career                | Testing Technician                                                                | Lifelong Learning and Workforce Development | Lakewood Ranch |
| Amber Goerner              | 10/28/2024            |      |  | Career                | Laboratory Technician and Support Specialist                                      | Natural Science                             | Bradenton      |
| <b><u>Changes</u></b>      |                       |      |  |                       |                                                                                   |                                             |                |
| Cameron Smith              | 10/07/2024            | From |  | Professional          | Project Coordinator, Lifelong Learning and Workforce Development Operations       | Lifelong Learning and Workforce Development | Lakewood Ranch |
|                            |                       | To   |  | Administrative        | Director, Lifelong Learning and Workforce Development                             | Lifelong Learning and Workforce Development | Lakewood Ranch |
| Kayla Yother               | 10/07/2024            | From |  | Professional          | Coordinator, Business                                                             | 26 West Entrepreneurship Center             | Bradenton      |
|                            |                       | To   |  | Professional          | Coordinator, Retention and Assessment & Testing                                   | 26 West Entrepreneurship Center             | Bradenton      |
| Kasey Martin               | 10/21/2024            | From |  | Career                | Admissions Assistant                                                              | Admissions                                  | Bradenton      |
|                            |                       | To   |  | Career                | Lead Testing Technician                                                           | Testing Center                              | Venice         |
| <b><u>Separations</u></b>  |                       |      |  |                       |                                                                                   |                                             |                |
| Silena Hammond             | 10/04/2024            |      |  | Faculty               | Instructor - Collegiate School                                                    | Collegiate School - Bradenton               | Bradenton      |
| Eva Beachy                 | 10/25/2024            |      |  | Professional          | Coordinator, Nursing Operations                                                   | Nursing                                     | Lakewood Ranch |
| <b><u>Retirement</u></b>   |                       |      |  |                       |                                                                                   |                                             |                |
| Eric Van Vlack             | 10/31/2024            |      |  | Career                | Supplemental Instruction Specialist - Tutoring and Academic Success Center (TASC) | Tutoring and Academic Success Center        | Venice         |

# State College of Florida, Manatee-Sarasota

## Approval Request For Out Of Country Travel

**Procedure 1.29.01 Travel Authorization and Funding** "...those persons traveling out of the country must complete an approval of request for out-of-country travel form in the Human Resources office and must receive Board of Trustees approval prior to travel."

Date: 11/15/24

Applicant: Kristin Goddard

Department: SCF Collegiate School - Bradenton

Dates of Travel: June 30, 2025 – July 9, 2025 (projected dates)

Reason: EF Tour – Sustainable Living in Germany and Switzerland

Location: Berlin and Frieburg, Germany – Lucerne, Switzerland

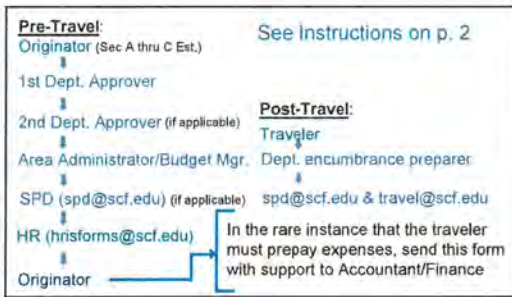
Purpose of Travel: The purpose of this travel is to accompany students on a 10-day international exploration of Germany and Switzerland's innovative sustainability efforts in the areas of renewable energy, urban farming, and eco-tourism. This STEM-focused trip comes at the culmination of SCFCS' three-year global competency initiative which begins with research into the United Nations Sustainable Development Goals and ends with witnessing first-hand the action being taken around the work to achieve these goals. Our students will return with the experience, enthusiasm, and empathy necessary to pursue the STEM careers at the forefront of real-world innovation and issues of global significance.

Estimated Cost: The estimated cost to the college is \$0.00. The chaperone expense is calculated into the cost per student traveler.

Other Comments: See attached detailed itinerary and presentation materials.

Approved: \_\_\_\_\_  
Chairman, Board of Trustees

\_\_\_\_\_  
Date



PRE-TRAVEL ENCUMBRANCE:   
 POST-TRAVEL ENCUMBRANCE:   
 NCE?  SPD?   
 Ven Inv A/P TAR (PCard GL04)  
 Pre-Travel:      
 Post-Travel:      
 Originator Name:  Phone:

Note: All travel must be for performance of a public purpose authorized by law to be performed by the College. All Out-Of-District, Out-of-State, and Out-of-Country travel shall be authorized and approved IN ADVANCE by the President's designated representative. Out-of-Country travel shall be approved by the Board. After travel has been performed, submit to the Office **WITHIN TEN (10) DAYS OF THE TRAVELER'S RETURN to Business the College. Attach a copy of the Agenda/Brochure and all receipts.** Refer to "Travel Guidelines" on Pg. 2.

**A. TRAVEL INFORMATION:** Name:  G00# (last 4 digits only): G00- Today's Date:   
 Departure Date:  Departure Time:  Return Date:  Return Time:   
 Purpose of Travel:  Location (include City & State):   
 Administrators/Faculty:  Total Working Days:  # days Substitute needed?  Career Employees:  # hours

**B. DEFINITIONS/ACCOUNTING:**

|                                             | Fund | Org                  | Account                                  | Amount               | Max SPD |
|---------------------------------------------|------|----------------------|------------------------------------------|----------------------|---------|
| <input type="text" value="Class A"/>        | 1.   | <input type="text"/> | <input type="text" value="60502"/>       | <input type="text"/> | 0.00%   |
| <input type="text" value="Out-of-Country"/> | 2.   | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | 0.00%   |
|                                             | 3.   | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | 0.00%   |

**C. EXPENSES:** ➔

If ACTUAL expenses exceed ESTIMATED by more than 10%, mark each item and justify in Report section below.

|                                                                 | Estimate | Actual  | Pd by PCard          | Pre-Travel Reimb.    | Post-Travel Reimb.   |
|-----------------------------------------------------------------|----------|---------|----------------------|----------------------|----------------------|
| <b>LODGING &amp; MEAL REIMBURSEMENT:</b>                        |          |         |                      |                      |                      |
| 1. Lodging: Attach receipts for lodging (single occupancy)..... | \$ 0.00  | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. Meal Allowances:                                             |          |         |                      |                      |                      |
| 0 Breakfasts @ \$ 6.00 each = \$ 0.00                           |          |         |                      |                      |                      |
| 0 Lunches @ \$ 11.00 each = \$ 0.00                             |          |         |                      |                      |                      |
| 0 Dinners @ \$ 19.00 each = \$ 0.00                             |          |         |                      |                      |                      |
| <b>TOTAL LODGING/MEALS</b> .....                                | \$ 0.00  | \$ 0.00 | \$ 0.00              | <input type="text"/> | \$ 0.00              |

**TRANSPORTATION:**

|                                                                                                                                  |         |         |                      |                      |                      |
|----------------------------------------------------------------------------------------------------------------------------------|---------|---------|----------------------|----------------------|----------------------|
| 1. <input type="text" value="Own"/> Additional Travelers: <input type="text" value="Julia Hathaway, Karen Lewellen, Sean Sell"/> |         |         |                      |                      |                      |
| 2. Mileage: Computed from (Google Map, etc.) <input type="text" value="0"/> miles @ \$ 0.445 per mile.....                       | \$ 0.00 | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Vicinity mileage when applicable <input type="text" value="0"/> miles @ \$ 0.445 per mile.....                                   | \$ 0.00 | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 3. Tourist Class Air Fare: <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler.....     | \$ 0.00 | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <b>REGISTRATION FEE:</b>                                                                                                         |         |         |                      |                      |                      |
| 1. <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler.....                             | \$ 0.00 | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. Meals included in registration and deducted from expenses (attach agenda and registration).....                               | \$ 0.00 | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <b>OTHER EXPENSES (include receipts):</b> <input type="text" value="Select Other Expenses"/>                                     |         | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Details of Other/Multiple: <input type="text"/>                                                                                  |         | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <b>TOTAL EXPENSES</b>                                                                                                            | \$ 0.00 | \$ 0.00 | \$ 0.00              | \$ 0.00              | \$ 0.00              |

**D. CERTIFICATION:** This travel voucher is true and correct in every material matter. These expenses were actually incurred by me and were necessary for the performance of official duties of the College. I have not obtained, nor do I intend to obtain, reimbursement for these same expenses from any other source.

#1  Digitally signed by Kristin Goddard Date: 2024.11.14 15:11:01 -05'00'   #2   
 Traveler's (Pre-Travel) Signature      Traveler's Phone #      Traveler's Department      Traveler's (Post-Travel) Signature

**REPORT** Complete this portion AFTER your return (use additional sheet if necessary). Give an account showing how the leave was fulfilled and what benefits have accrued to the College as a result.

⊗ Explanation of difference between ESTIMATED and ACTUAL (greater than 10%):

**AUTHORIZATION**

Approved by:

|                                                                                                                  |                                                                                                            |                                                                                                            |                           |
|------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------|
| <input type="text" value="Lewelle, Karen"/> Digitally signed by Lewelle, Karen Date: 2024.11.15 11:28:08 -05'00' | <input type="text" value="Kelly Monod"/> Digitally signed by Kelly Monod Date: 2024.11.21 14:18:31 -05'00' | <input type="text" value="Todd Fritch"/> Digitally signed by Todd Fritch Date: 2024.11.21 14:22:36 -05'00' | <input type="text"/>      |
| 1st Departmental Approval                                                                                        | 2nd Departmental Approval (if applicable)                                                                  | Area Administrator                                                                                         | SPD Chair (if applicable) |

Click to e-mail form

**Finance** Accountant / Post:

NOTE: each time this form is e-mailed, copy the originator.

# State College of Florida, Manatee-Sarasota

## Approval Request For Out Of Country Travel

**Procedure 1.29.01 Travel Authorization and Funding** "...those persons traveling out of the country must complete an approval of request for out-of-country travel form in the Human Resources office and must receive Board of Trustees approval prior to travel."

Date: 11/15/24

Applicant: Julia Hathaway

Department: SCF Collegiate School - Bradenton

Dates of Travel: June 30, 2025 – July 9, 2025 (projected dates)

Reason: EF Tour – Sustainable Living in Germany and Switzerland

Location: Berlin and Frieburg, Germany – Lucerne, Switzerland

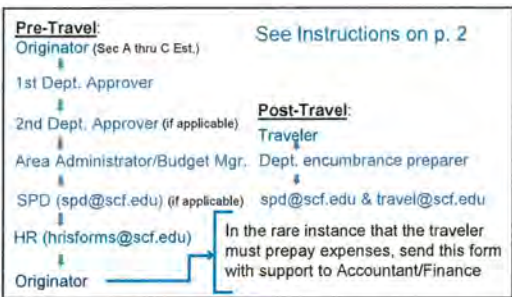
Purpose of Travel: The purpose of this travel is to accompany students on a 10-day international exploration of Germany and Switzerland's innovative sustainability efforts in the areas of renewable energy, urban farming, and eco-tourism. This STEM-focused trip comes at the culmination of SCFCS' three-year global competency initiative which begins with research into the United Nations Sustainable Development Goals and ends with witnessing first-hand the action being taken around the work to achieve these goals. Our students will return with the experience, enthusiasm, and empathy necessary to pursue the STEM careers at the forefront of real-world innovation and issues of global significance.

Estimated Cost: The estimated cost to the college is \$0.00. The chaperone expense is calculated into the cost per student traveler.

Other Comments: See attached detailed itinerary and presentation materials.

Approved: \_\_\_\_\_  
Chairman, Board of Trustees

\_\_\_\_\_  
Date



PRE-TRAVEL ENCUMBRANCE: \_\_\_\_\_  
 POST-TRAVEL ENCUMBRANCE: \_\_\_\_\_

NCE?  SPD?

|              | Ven                  | Inv                  | A/P                  | TAR (PCard GL04)     |
|--------------|----------------------|----------------------|----------------------|----------------------|
| Pre-Travel:  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Post-Travel: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Originator Name: \_\_\_\_\_ Phone: \_\_\_\_\_

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Departure Date:  Departure Time:  Return Date:  Return Time:

Purpose of Travel:  Location (include City & State):

Administrators/Faculty: \_\_\_\_\_ Total Working Days:  # days Substitute needed?  Career Employees: \_\_\_\_\_ # hours

**B. DEFINITIONS/ACCOUNTING:**

|                                             | Fund                 | Org                  | Account                                  | Amount               | Max SPD                            |
|---------------------------------------------|----------------------|----------------------|------------------------------------------|----------------------|------------------------------------|
| <input type="text" value="Class A"/>        | <input type="text"/> | <input type="text"/> | <input type="text" value="60502"/>       | <input type="text"/> | <input type="text" value="0.00%"/> |
| <input type="text" value="Out-of-Country"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text" value="0.00%"/> |
|                                             | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text" value="0.00%"/> |

**C. EXPENSES:** ➔

IF ACTUAL expenses exceed ESTIMATED by more than 10%, mark each item and justify in Report section below.

|                                                                                                                                   | Estimate | Actual  | Pd by                |                       |                        |
|-----------------------------------------------------------------------------------------------------------------------------------|----------|---------|----------------------|-----------------------|------------------------|
|                                                                                                                                   |          |         | (a) PCard            | (d) Pre-Travel Reimb. | (e) Post-Travel Reimb. |
| <b>LODGING &amp; MEAL REIMBURSEMENT:</b>                                                                                          |          |         |                      |                       |                        |
| 1. Lodging: Attach receipts for lodging (single occupancy).....                                                                   | \$ 0.00  | \$ 0.00 | <input type="text"/> | <input type="text"/>  | <input type="text"/>   |
| 2. Meal Allowances:                                                                                                               |          |         |                      |                       |                        |
| Breakfasts @ \$ 6.00 each = \$ 0.00                                                                                               |          |         |                      |                       |                        |
| Lunches @ \$ 11.00 each = \$ 0.00                                                                                                 |          |         |                      |                       |                        |
| Dinners @ \$ 19.00 each = \$ 0.00                                                                                                 |          |         |                      |                       |                        |
| <b>TOTAL LODGING/MEALS</b>                                                                                                        | \$ 0.00  | \$ 0.00 | \$ 0.00              |                       | \$ 0.00                |
| <b>TRANSPORTATION:</b>                                                                                                            |          |         |                      |                       |                        |
| 1. <input type="text" value="Own"/> Additional Travelers: <input type="text" value="Kristin Goddard, Karen Lewellen, Sean Sell"/> |          |         |                      |                       |                        |
| 2. Mileage: Computed from (Google Map, etc.) <input type="text" value="0"/> miles @ \$ 0.445 per mile...                          | \$ 0.00  | \$ 0.00 |                      |                       |                        |
| Vicinity mileage when applicable <input type="text" value="0"/> miles @ \$ 0.445 per mile.....                                    | \$ 0.00  | \$ 0.00 |                      |                       |                        |
| 3. Tourist Class Air Fare: <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler.....      | \$ 0.00  | \$ 0.00 |                      |                       |                        |
| <b>REGISTRATION FEE:</b>                                                                                                          |          |         |                      |                       |                        |
| 1. <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler.....                              | \$ 0.00  | \$ 0.00 |                      |                       |                        |
| 2. Meals included in registration and deducted from expenses (attach agenda and registration).....                                | \$ 0.00  | \$ 0.00 |                      |                       |                        |
| <b>OTHER EXPENSES (include receipts):</b> <input type="text" value="Select Other Expenses"/>                                      |          |         |                      |                       |                        |
| Details of Other/Multiple: _____                                                                                                  |          |         |                      |                       |                        |
| <b>TOTAL EXPENSES</b>                                                                                                             | \$ 0.00  | \$ 0.00 | \$ 0.00              | \$ 0.00               | \$ 0.00                |

**D. CERTIFICATION:** This travel voucher is true and correct in every material matter. These expenses were actually incurred by me and were necessary for the performance of official duties of the College. I have not obtained, nor do I intend to obtain, reimbursement for these same expenses from any other source.

#1  Digitally signed by Julia Hathaway Date: 2024.11.14 14:33:43 -05'00' Traveler's (Pre-Travel) Signature

Traveler's Phone #

Traveler's Department

#2 \_\_\_\_\_ Traveler's (Post-Travel) Signature

**REPORT** Complete this portion AFTER your return (use additional sheet if necessary). Give an account showing how the leave was fulfilled and what benefits have accrued to the College as a result.

⊗ Explanation of difference between ESTIMATED and ACTUAL (greater than 10%): \_\_\_\_\_

**AUTHORIZATION**

Approved by:

|                                                                                                                                              |                                                                                                                                                            |                                                                                                                               |                                                |
|----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| <input type="text" value="Kristin Goddard"/> Digitally signed by Kristin Goddard Date: 2024.11.14 15:12:04 -05'00' 1st Departmental Approval | <input type="text" value="Karen Lewellen"/> Digitally signed by Karen Lewellen Date: 2024.11.15 11:27:39 -05'00' 2nd Departmental Approval (if applicable) | <input type="text" value="Todd Fritch"/> Digitally signed by Todd Fritch Date: 2024.11.21 14:23:10 -05'00' Area Administrator | <input type="text"/> SPD Chair (if applicable) |
|----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|

Click to e-mail form

**Finance** Accountant / Post: \_\_\_\_\_

NOTE: each time this form is e-mailed, copy the originator.

# State College of Florida, Manatee-Sarasota

## Approval Request For Out Of Country Travel

**Procedure 1.29.01 Travel Authorization and Funding** "...those persons traveling out of the country must complete an approval of request for out-of-country travel form in the Human Resources office and must receive Board of Trustees approval prior to travel."

Date: 11/15/24

Applicant: Karen Lewellen

Department: SCF Collegiate School - Bradenton

Dates of Travel: June 30, 2025 – July 9, 2025 (projected dates)

Reason: EF Tour – Sustainable Living in Germany and Switzerland

Location: Berlin and Frieburg, Germany – Lucerne, Switzerland

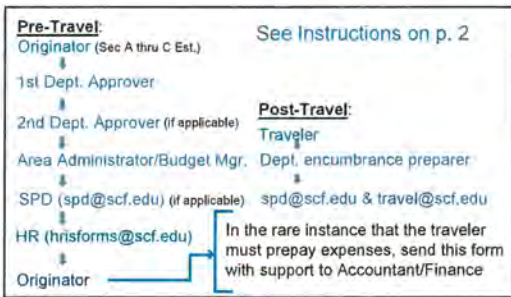
Purpose of Travel: The purpose of this travel is to accompany students on a 10-day international exploration of Germany and Switzerland's innovative sustainability efforts in the areas of renewable energy, urban farming, and eco-tourism. This STEM-focused trip comes at the culmination of SCFCS' three-year global competency initiative which begins with research into the United Nations Sustainable Development Goals and ends with witnessing first-hand the action being taken around the work to achieve these goals. Our students will return with the experience, enthusiasm, and empathy necessary to pursue the STEM careers at the forefront of real-world innovation and issues of global significance.

Estimated Cost: The estimated cost to the college is \$0.00. The chaperone expense is calculated into the cost per student traveler.

Other Comments: See attached detailed itinerary and presentation materials.

Approved: \_\_\_\_\_  
Chairman, Board of Trustees

\_\_\_\_\_  
Date



PRE-TRAVEL ENCUMBRANCE: \_\_\_\_\_  
 POST-TRAVEL ENCUMBRANCE: \_\_\_\_\_

NCE?  SPD?

Pre-Travel: Ven \_\_\_\_\_ Inv \_\_\_\_\_ A/P \_\_\_\_\_ TAR (PCard GL04) \_\_\_\_\_  
 Post-Travel: \_\_\_\_\_  
 Originator Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Note:** All travel must be for performance of a public purpose authorized by law to be performed by the College. All Out-Of-District, Out-of-State, and Out-of-Country travel shall be authorized and approved IN ADVANCE by the President's designated representative. Out-of-Country travel shall be approved by the Board. After travel has been performed, submit to the Office **WITHIN TEN (10) DAYS OF THE TRAVELER'S RETURN** to Busi the College. Attach a copy of the Agenda/Brochure and all receipts. Refer to "Travel Guidelines" on Pg. 2.

**A. TRAVEL INFORMATION:** Name:  G00# (last 4 digits only): G00\_  Today's Date:

Departure Date:  Departure Time:  Return Date:  Return Time:

Purpose of Travel:  Location (include City & State):

Administrators/Faculty: \_\_\_\_\_ Total Working Days:  # days Substitute needed?  Career Employees: \_\_\_\_\_ # hours

**B. DEFINITIONS/ACCOUNTING:**

|                                             | Fund                 | Org                  | Account                                  | Amount               | Max SPD              |
|---------------------------------------------|----------------------|----------------------|------------------------------------------|----------------------|----------------------|
| <input type="text" value="Class A"/>        | <input type="text"/> | <input type="text"/> | <input type="text" value="60502"/>       | <input type="text"/> | <input type="text"/> |
| <input type="text" value="Out-of-Country"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text"/> |
|                                             | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text"/> |

**C. EXPENSES:** ➔

If ACTUAL expenses exceed ESTIMATED by more than 10%, mark each item and justify in Report section below.

|                                                                 | Estimate                       | Actual                         | Pd by PCard                    | Pre-Travel Reimb.              | Post-Travel Reimb.             |
|-----------------------------------------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| <b>LODGING &amp; MEAL REIMBURSEMENT:</b>                        |                                |                                |                                |                                |                                |
| 1. Lodging: Attach receipts for lodging (single occupancy)..... | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text"/>           | <input type="text"/>           | <input type="text"/>           |
| 2. Meal Allowances:                                             |                                |                                |                                |                                |                                |
| 0 Breakfasts @ 6 each = 0                                       |                                |                                |                                |                                |                                |
| 0 Lunches @ 11 each = 0                                         |                                |                                |                                |                                |                                |
| 0 Dinners @ 19 each = 0                                         |                                |                                |                                |                                |                                |
| <b>Total Meals</b>                                              | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text"/>           | <input type="text"/>           | <input type="text"/>           |
| <b>Total All Amounts</b>                                        | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> | <input type="text" value="0"/> |

**TRANSPORTATION:**

1.  Additional Travelers:

2. Mileage: Computed from (Google Map, etc.)  miles @ .445 per mile...  
 Vicinity mileage when applicable  miles @ .445 per mile.....

3. Tourist Class Air Fare:  Prepaid by SCF  Paid by Traveler.....

**REGISTRATION FEE:**

1.  Prepaid by SCF  Paid by Traveler.....

2. Meals included in registration and deducted from expenses (attach agenda and registration).....

**OTHER EXPENSES (include receipts):**

Details of Other/Multiple: \_\_\_\_\_

**TOTAL EXPENSES**      360      0      0      0      0

**D. CERTIFICATION:** This travel voucher is true and correct in every material matter. These expenses were actually incurred by me and were necessary for the performance of official duties of the College. I have not obtained, nor do I intend to obtain, reimbursement for these same expenses from any other source.

#1    #2

Traveler's (Pre-Travel) Signature      Traveler's Phone #      Traveler's Department      Traveler's (Post-Travel) Signature

**REPORT** Complete this portion AFTER your return (use additional sheet if necessary). Give an account showing how the leave was fulfilled and what benefits have accrued to the College as a result.

☐ Explanation of difference between ESTIMATED and ACTUAL (greater than 10%):

**AUTHORIZATION**

Approved by:

1st Departmental Approval      2nd Departmental Approval (if applicable)      Area Administrator      SPD Chair (if applicable)

MySCF>Employee>PCard & Travel v37      NOTE: each time this form is e-mailed, copy the originator.      Finance Accountant / Post:

Click to e-mail form      16



# State College of Florida, Manatee-Sarasota

## Approval Request For Out Of Country Travel

**Procedure 1.29.01 Travel Authorization and Funding** "...those persons traveling out of the country must complete an approval of request for out-of-country travel form in the Human Resources office and must receive Board of Trustees approval prior to travel."

Date: 11/15/24

Applicant: Sean Sell

Department: SCF Collegiate School - Bradenton

Dates of Travel: June 30, 2025 – July 9, 2025 (projected dates)

Reason: EF Tour – Sustainable Living in Germany and Switzerland

Location: Berlin and Frieburg, Germany – Lucerne, Switzerland

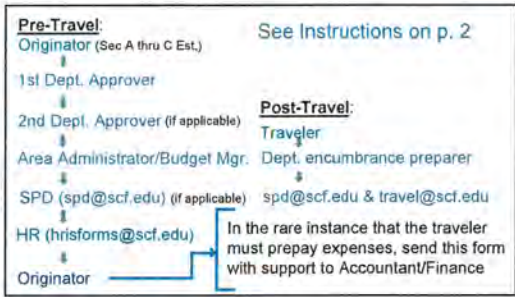
Purpose of Travel: The purpose of this travel is to accompany students on a 10-day international exploration of Germany and Switzerland's innovative sustainability efforts in the areas of renewable energy, urban farming, and eco-tourism. This STEM-focused trip comes at the culmination of SCFCS' three-year global competency initiative which begins with research into the United Nations Sustainable Development Goals and ends with witnessing first-hand the action being taken around the work to achieve these goals. Our students will return with the experience, enthusiasm, and empathy necessary to pursue the STEM careers at the forefront of real-world innovation and issues of global significance.

Estimated Cost: The estimated cost to the college is \$0.00. The chaperone expense is calculated into the cost per student traveler.

Other Comments: See attached detailed itinerary and presentation materials.

Approved: \_\_\_\_\_  
Chairman, Board of Trustees

\_\_\_\_\_  
Date



PRE-TRAVEL ENCUMBRANCE: \_\_\_\_\_  
 POST-TRAVEL ENCUMBRANCE: \_\_\_\_\_

NCE?  No  Y  N SPD?  Y  N

|              | Ven | Inv | A/P | TAR (PCard GL04) |
|--------------|-----|-----|-----|------------------|
| Pre-Travel:  |     |     |     |                  |
| Post-Travel: |     |     |     |                  |

Originator Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Note:** All travel must be for performance of a public purpose authorized by law to be performed by the College. All Out-Of-District, Out-of-State, and Out-of-Country travel shall be authorized and approved IN ADVANCE by the President's designated representative. Out-of-Country travel shall be approved by the Board. After travel has been performed, submit to the Office WITHIN TEN (10) DAYS OF THE TRAVELER'S RETURN to the College. Attach a copy of the Agenda/Brochure and all receipts. Refer to "Travel Guidelines" on Pg. 2.

**A. TRAVEL INFORMATION:** Name: Sean Sell G00# (last 4 digits only): G00 7525 Today's Date: 11/14/24

Departure Date: 06/30/25 Departure Time: 07:00 AM Return Date: 07/09/25 Return Time: 07:00 PM

Purpose of Travel: SCFCS EF Tour to Germany and Switzerland Location (include City & State): Germany and Switzerland

Administrators/Faculty: \_\_\_\_\_ Total Working Days: 10 # days Substitute needed?  No  Yes Career Employees: \_\_\_\_\_ # hours

**B. DEFINITIONS/ACCOUNTING:**

|                       | Fund | Org | Account            | Amount | Max SPD |
|-----------------------|------|-----|--------------------|--------|---------|
| <u>Class A</u>        |      |     | <u>60502</u>       |        | 0.00%   |
| <u>Out-of-Country</u> |      |     | <u>Select Acct</u> |        | 0.00%   |
|                       |      |     | <u>Select Acct</u> |        | 0.00%   |

**C. EXPENSES:** ➔

IF ACTUAL expenses exceed ESTIMATED by more than 10%, mark each item and justify in Report section below.

|                                                                 | Estimate | Actual  | Pd by PCard | Pre-Travel Reimb. | Post-Travel Reimb. |
|-----------------------------------------------------------------|----------|---------|-------------|-------------------|--------------------|
| <b>LODGING &amp; MEAL REIMBURSEMENT:</b>                        |          |         |             |                   |                    |
| 1. Lodging: Attach receipts for lodging (single occupancy)..... | \$ 0.00  | \$ 0.00 |             |                   |                    |
| 2. Meal Allowances:                                             |          |         |             |                   |                    |
| 0 Breakfasts @ \$ 6.00 each = \$ 0.00                           |          |         |             |                   |                    |
| 0 Lunches @ \$ 11.00 each = \$ 0.00                             |          |         |             |                   |                    |
| 0 Dinners @ \$ 19.00 each = \$ 0.00                             |          |         |             |                   |                    |
| <b>TOTAL LODGING/MEALS</b>                                      | \$ 0.00  | \$ 0.00 | \$ 0.00     |                   | \$ 0.00            |

**TRANSPORTATION:**

|                                                                                                                              |         |         |  |  |  |
|------------------------------------------------------------------------------------------------------------------------------|---------|---------|--|--|--|
| 1. <u>Own</u> Additional Travelers: <u>Kristin Goddard, Karen Lewellen, Julia Hathaway</u>                                   |         |         |  |  |  |
| 2. Mileage: Computed from (Google Map, etc.) <u>0</u> miles @ \$ 0.445 per mile...                                           | \$ 0.00 | \$ 0.00 |  |  |  |
| Vicinity mileage when applicable <u>0</u> miles @ \$ 0.445 per mile.....                                                     | \$ 0.00 | \$ 0.00 |  |  |  |
| 3. Tourist Class Air Fare: <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler..... | \$ 0.00 | \$ 0.00 |  |  |  |

**REGISTRATION FEE:**

|                                                                                                      |         |         |  |  |  |
|------------------------------------------------------------------------------------------------------|---------|---------|--|--|--|
| 1. <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler..... | \$ 0.00 | \$ 0.00 |  |  |  |
| 2. Meals included in registration and deducted from expenses (attach agenda and registration).....   | \$ 0.00 | \$ 0.00 |  |  |  |

**OTHER EXPENSES (include receipts):** Select Other Expenses

|                                  |         |         |         |         |         |
|----------------------------------|---------|---------|---------|---------|---------|
| Details of Other/Multiple: _____ | \$ 0.00 | \$ 0.00 |         |         |         |
| <b>TOTAL EXPENSES</b>            | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

**D. CERTIFICATION:** This travel voucher is true and correct in every material matter. These expenses were actually incurred by me and were necessary for the performance of official duties of the College. I have not obtained, nor do I intend to obtain, reimbursement for these same expenses from any other source.

#1 Sean Sell Digitally signed by Sean Sell Date: 2024.11.15 10:47:33 -05'00' 9417525494 SCFCS #2 \_\_\_\_\_

Traveler's (Pre-Travel) Signature      Traveler's Phone #      Traveler's Department      Traveler's (Post-Travel) Signature

**REPORT** Complete this portion AFTER your return (use additional sheet if necessary). Give an account showing how the leave was fulfilled and what benefits have accrued to the College as a result.

☐ Explanation of difference between ESTIMATED and ACTUAL (greater than 10%):

**AUTHORIZATION**

Approved by:

|                                                                                              |                                                                                              |                                                                                      |                           |
|----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|---------------------------|
| <u>Kristin Goddard</u> Digitally signed by Kristin Goddard Date: 2024.11.15 10:51:48 -05'00' | <u>Lewellen, Karen</u> Digitally signed by Lewellen, Karen Date: 2024.11.15 11:28:33 -05'00' | <u>Todd Fritch</u> Digitally signed by Todd Fritch Date: 2024.11.21 14:22:03 -05'00' |                           |
| 1st Departmental Approval                                                                    | 2nd Departmental Approval (if applicable)                                                    | Area Administrator                                                                   | SPD Chair (if applicable) |

MySCF>Employee>PCard & Travel v37

Click to e-mail form

**Finance** Accountant / Post: \_\_\_\_\_

NOTE: each time this form is e-mailed, copy the originator

“Learning must be tied to real-world, relevant experiences in order for students to connect with their education.”

Valerie F., former Science Department Chair



^

Berlin's Brandenburg Gate was modeled after architectural elements from the Acropolis.



<

Visit the Black Forest, the backdrop for many of the Brothers Grimm fairytales.

#### Days 1–2: Fly to Germany

Meet your Tour Director at the airport in Berlin, the vibrant capital of reunified Germany. As you stroll the city on a guided tour, you'll see the contrast of old and new—a mix of Baroque buildings, skyscrapers, and quaint cafes where entrepreneurs meet to brainstorm.

#### Day 3: Berlin

Take an expert-led tour of the city, where you'll see the famous Brandenburg Gate and Holocaust Memorial. Then explore the future of people, the environment, and technology at the Futurium museum. You'll also tour one of Berlin's repurposed industrial complexes with an urban planner and try your hand at urban planning yourself.

#### Day 4: Berlin

This morning, exercise your creativity out in the field during your visit to an innovative local company. In the afternoon, learn about city agriculture at a working urban farm.

#### Days 5–6: Freiburg

Travel to the medieval city of Freiburg, now known for having reinvented itself as an eco-friendly community. Explore the city through the eyes of an environmental sustainability expert, as you enjoy a guided interactive experience through Freiburg's eco-districts, which feature green buildings, bike trails, and urban gardens.

#### Day 7: Freiburg | Lucerne region

Start your day with a hike through the picturesque Black Forest. Visit the town of Hofgut Sternen to check out local crafts, like the famous cuckoo clocks, and tour the village's sustainable facilities, including an on-site power plant. For lunch, make your own *flammekueche*, a style of flatbread from the nearby Alsace region.

#### Day 8: Lucerne region

Ride a cable car to the top of the Swiss Alps, where you'll walk through glacial cave, learn about the effects of global warming, and even go snow-tubing. Back on the ground, take a tour of Lucerne. Visit the poignant Lion Monument and the medieval Chapel Bridge, where you can admire the murals overhead.

#### Day 9: Entlebuch | Lucerne region

Hike with an environmental scientist through the Entlebuch Biosphere, a nature reserve and UNESCO World Heritage Site at the foot of the Alps. Then head underground for a tour through a bunker system in Lucerne, outfitted with dormitories, eateries, and even medical facilities.

#### Day 10: Depart for home

Return with global perspectives and a renewed passion for sustainability.

## Our EF STEM Experience



**Experiential learning**

We will apply STEM principles by participating in project-based learning that goes well beyond theory



**Innovative locations**

We will tour exciting destinations that host some of the world's most advanced laboratories, universities, and companies, or are simply perfect global "classrooms" to study scientific issues of the day in real life



**Industry experts**

We will collaborate and learn with scientists, engineers, researchers, and other STEM practitioners in the field

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## Sustainable Living in Germany & Switzerland



The map illustrates a travel itinerary across Germany and Switzerland. It shows a route starting in Berlin (3 nights), moving to Freiburg (2 nights), and then to the Lucerne region (3 nights). Each location is accompanied by a circular inset image: Berlin shows a classical building, Freiburg shows a town square with a church, and the Lucerne region shows a scenic view of a lake and buildings. Airplane icons and lines indicate the flight paths between these locations.

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**Berlin & Freiburg**  
Days 1-5

**Day 1**  
Fly overnight to Germany

**Day 2**  
Take a walking tour of Berlin

See the East Side Gallery & other iconic sites

**Day 3**  
Tour an urban sustainable development project

Visit the Futurium museum

Visit a working urban farm

Visit an innovative local company

Take the train to Freiburg

**Day 4**

**Day 5**

27

**Freiburg & the Lucerne Region**  
Days 6-10

**Day 6**  
Explore the green city of Freiburg through the eyes of an environmental sustainability expert

**Day 7**  
Travel through the Black Forest to Lucerne

Visiting the Hofgut Sternen sustainable facilities

**Day 8**  
Ride a cable car to the top of the Swiss Alps

Take a walking tour of Lucerne

Hike through the Entlebuch Biosphere

Tour an underground bunker with an expert

Travel home

**Day 9**

**Day 10**

28

# State College of Florida, Manatee-Sarasota

## Approval Request For Out Of Country Travel

**Procedure 1.29.01 Travel Authorization and Funding** "...those persons traveling out of the country must complete an approval of request for out-of-country travel form in the Human Resources office and must receive Board of Trustees approval prior to travel."

Date: 11/15/24

Applicant: Kristin Goddard

Department: SCF Collegiate School - Bradenton

Dates of Travel: June 4, 2025 – June 13, 2025 (projected)

Reason: EF Tour – Community Development in Peru’s Mountain Villages

Location: Peru - Lima/Cuzco/Sacred Valley/Machu Picchu

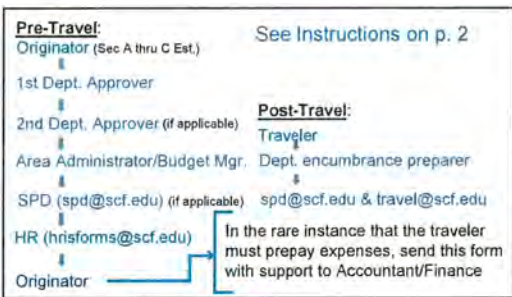
Purpose of Travel: The purpose of this travel is to chaperone a small group of altruistic students on a 10-day trip into the remote villages surrounding Cuzco and the Sacred Valley of Peru. As we explore the heart of Inca civilization, students will learn how locals preserve history, art and heritage, while also gaining insight into the challenges they face. Working together with community members, SCF Collegiate School students will build long-term solutions to support economic sustainability, agriculture and access to education while earning 10 service hours. These high school students will return to SCF empowered and energized to step out into world to become global leaders undeterred by the struggles and diverse perspectives they encounter along the way.

Estimated Cost: Possible cost of this trip to the college is \$1850.

Other Comments: See attached detailed itinerary and presentation materials.

Approved: \_\_\_\_\_  
Chairman, Board of Trustees

\_\_\_\_\_  
Date



  
**STATE COLLEGE OF FLORIDA**  
 MANATEE-SARASOTA  
**TRAVEL AUTHORIZATION AND VOUCHER FORM**  
 (FOR EMPLOYEES ONLY)  
 Reimbursement of College expense will be according to SCF Rule 6HX14-1.29 Travel Authorization and Funding

PRE-TRAVEL ENCUMBRANCE: \_\_\_\_\_  
 POST-TRAVEL ENCUMBRANCE: \_\_\_\_\_

NCE?  **NCE?** SPD?  **Y/N**

|              | Ven                  | Inv                  | A/P                  | TAR (PCard GL04)     |
|--------------|----------------------|----------------------|----------------------|----------------------|
| Pre-Travel:  | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Post-Travel: | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Originator Name: \_\_\_\_\_ Phone: \_\_\_\_\_

**Note:** All travel must be for performance of a public purpose authorized by law to be performed by the College. All Out-Of-District, Out-of-State, and Out-of-Country travel shall be authorized and approved IN ADVANCE by the President's designated representative. Out-of-Country travel shall be approved by the Board. After travel has been performed, submit to thness Office **WITHIN TEN (10) DAYS OF THE TRAVELER'S RETURN to Busi the College. Attach a copy of the Agenda/Brochure and all receipts.** Refer to "Travel Guidelines" on Pg. 2.

**A. TRAVEL INFORMATION:** Name:  G00# (last 4 digits only): G00\_  Today's Date:

Departure Date:  Departure Time:  Return Date:  Return Time:

Purpose of Travel:  Location (include City & State):

Administrators/Faculty: \_\_\_\_\_ Total Working Days:  # days Substitute needed?  Career Employees:  # hours

**B. DEFINITIONS/ACCOUNTING:**

|                                             | Fund                 | Org                  | Account                                  | Amount               | Max SPD                            |
|---------------------------------------------|----------------------|----------------------|------------------------------------------|----------------------|------------------------------------|
| <input type="text" value="Class A"/>        | <input type="text"/> | <input type="text"/> | <input type="text" value="60502"/>       | <input type="text"/> | <input type="text" value="0.00%"/> |
| <input type="text" value="Out-of-Country"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text" value="0.00%"/> |
|                                             | <input type="text"/> | <input type="text"/> | <input type="text" value="Select Acct"/> | <input type="text"/> | <input type="text" value="0.00%"/> |

**C. EXPENSES:** ➔

IF ACTUAL expenses exceed ESTIMATED by more than 10%, mark each item and justify in Report section below.

|                                                                 | Estimate | Actual  | Pd by PCard          | Pre-Travel Reimb.    | Post-Travel Reimb.   |
|-----------------------------------------------------------------|----------|---------|----------------------|----------------------|----------------------|
| <b>LODGING &amp; MEAL REIMBURSEMENT:</b>                        |          |         |                      |                      |                      |
| 1. Lodging: Attach receipts for lodging (single occupancy)..... | \$ 0.00  | \$ 0.00 | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. Meal Allowances:                                             |          |         |                      |                      |                      |
| 0 Breakfasts @ \$ 6.00 each = \$ 0.00                           |          |         |                      |                      |                      |
| 0 Lunches @ \$ 11.00 each = \$ 0.00                             |          |         |                      |                      |                      |
| 0 Dinners @ \$ 19.00 each = \$ 0.00                             |          |         |                      |                      |                      |
| <b>Total Lodging</b>                                            | \$ 0.00  | \$ 0.00 |                      |                      |                      |
| <b>Total Meals</b>                                              | 0.00     | \$ 0.00 |                      |                      |                      |
| <b>Total All Amounts</b>                                        | \$ 0.00  | \$ 0.00 | \$ 0.00              |                      | \$ 0.00              |

*The college will not reimburse meals for Class C In-District Travel. TOTAL LODGING/MEALS...*

**TRANSPORTATION:**

|                                                                                                                              |             |         |         |         |         |
|------------------------------------------------------------------------------------------------------------------------------|-------------|---------|---------|---------|---------|
| 1. <input type="text" value="Own"/> Additional Travelers: <input type="text" value="SCFCS Students"/>                        |             |         |         |         |         |
| 2. Mileage: Computed from (Google Map, etc.) <input type="text" value="0"/> miles @ \$ 0.445 per mile...                     | \$ 0.00     | \$ 0.00 |         |         |         |
| Vicinity mileage when applicable <input type="text" value="0"/> miles @ \$ 0.445 per mile.....                               | \$ 0.00     | \$ 0.00 |         |         |         |
| 3. Tourist Class Air Fare: <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler..... | \$ 0.00     | \$ 0.00 |         |         |         |
| <b>REGISTRATION FEE:</b>                                                                                                     |             |         |         |         |         |
| 1. <input type="checkbox"/> Prepaid by SCF <input checked="" type="checkbox"/> Paid by Traveler.....                         | \$ 1,800.00 | \$ 0.00 |         |         |         |
| 2. Meals included in registration and deducted from expenses (attach agenda and registration).....                           | \$ 0.00     | \$ 0.00 |         |         |         |
| <b>OTHER EXPENSES (include receipts):</b> <input type="text" value="Select Other Expenses"/>                                 |             | \$ 0.00 |         |         |         |
| Details of Other/Multiple: _____                                                                                             |             | \$ 0.00 |         |         |         |
| <b>TOTAL EXPENSES</b>                                                                                                        | \$ 1,800.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

**D. CERTIFICATION:** This travel voucher is true and correct in every material matter. These expenses were actually incurred by me and were necessary for the performance of official duties of the College. I have not obtained, nor do I intend to obtain, reimbursement for these same expenses from any other source.

#1  Digitally signed by Kristin Goddard Date: 2024.11.15 11:10:52 -05'00'   #2

Traveler's (Pre-Travel) Signature      Traveler's Phone #      Traveler's Department      Traveler's (Post-Travel) Signature

**REPORT** Complete this portion AFTER your return (use additional sheet if necessary). Give an account showing how the leave was fulfilled and what benefits have accrued to the College as a result.

☉ Explanation of difference between ESTIMATED and ACTUAL (greater than 10%): \_\_\_\_\_

**AUTHORIZATION**

Approved by:

|                                                                                                                      |                                                                                                            |                                                                                                            |                           |
|----------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|---------------------------|
| <input type="text" value="Lewelle n, Karen"/> Digitally signed by Lewelle n, Karen Date: 2024.11.15 15:02:21 -05'00' | <input type="text" value="Kelly Monod"/> Digitally signed by Kelly Monod Date: 2024.11.21 14:17:12 -05'00' | <input type="text" value="Todd Fritch"/> Digitally signed by Todd Fritch Date: 2024.11.21 14:23:41 -05'00' | <input type="text"/>      |
| 1st Departmental Approval                                                                                            | 2nd Departmental Approval (if applicable)                                                                  | Area Administrator                                                                                         | SPD Chair (if applicable) |

MySCF>Employee>PCard & Travel v37

Click to e-mail form

**Finance** Accountant / Post:

NOTE: each time this form is e-mailed, copy the originator.

23

# COMMUNITY DEVELOPMENT IN PERU'S MOUNTAIN VILLAGES

10 days, estimated 15 service hours

## What to expect on this Service Learning Tour

### MEANINGFUL SERVICE

Working side by side with locals, you'll gain insight into the challenges they face and build lasting solutions to help empower the community.

#### Projects include:

- Building and restoring local schools for children to have a safe place to learn
- Assisting with health and hygiene lesson plans for teachers and school children
- Digging latrines and hand-washing stations in the community

### CULTURAL IMMERSION

Live just outside the communities you serve—celebrating customs and forming lasting connections with locals.

#### Activities include:

- Exploring the ancient Inca site of Machu Picchu
- Visiting renowned ceramicist Pablo Seminario's workshop and gaining insight into the unique intricacies of his art

### LEADERSHIP DEVELOPMENT

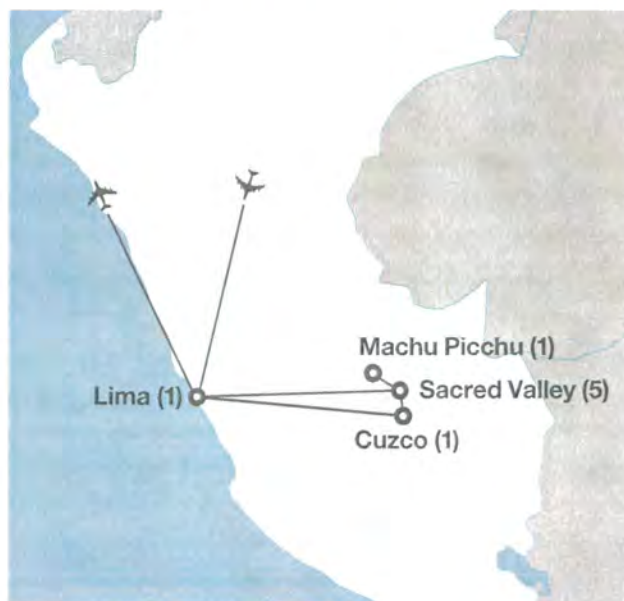
Your Field Director takes your global service experience even further, developing and strengthening leadership skills through activities and workshops.

#### Exercises include:

- Investigating global issues, exploring social justice, and building leadership skills
- Contextualizing the day's events through thoughtful discussion and group dialogue
- Reflective journaling to deepen the service experience



Students prepare mud bricks to be used in the building of green houses.







Many hands make light work as students transport beams to the project site



Students explore the ancient Inca site of Machu Picchu

## 10-DAY ITINERARY

### Day 1: Arrive in Peru

Meet your Field Director at the airport.

### Day 2: Sacred Valley of the Incas

Fly to Cuzco, the unofficial capital of the Sacred Valley of the Incas. Then, transfer to the Sacred Valley.

- Tour the home and studio of famed ceramicist Pablo Seminario and watch a live pottery demonstration.

### Day 3: Machu Picchu

Travel by train to Aguas Calientes.

- Explore the ancient Inca site of Machu Picchu with your local guide.
- Take an afternoon hike to the Sun Gate or explore the site in groups.

### Day 4: Sacred Valley

Travel by train to Ollantaytambo then continue exploring the Sacred Valley before transferring to your hotel for a project welcome and orientation.

### Days 5-7: Service Project—Sacred Valley

As communities evolve, so do their needs. That's why we work closely with local nonprofits to better understand each community's issues. Since projects are determined closer to your actual tour date, here's a glimpse at what a typical day might look like:

- Working side by side with locals, your projects will address education, health, and economic development, like restoring local schools and building hand-washing stations.
- Throughout your stay you'll also be immersed in cultural activities.
- Each evening, you'll reflect, discuss events as a group, and draw connections between the day's work and relevant global issues.

### Day 8: Cuzco

Transfer to Cuzco via Pisac

- Visit the Pisac Market, famous for its local crafts.
- Enjoy a walking tour of the city and a local market.

### Day 9: Lima—Depart for home

Return to Lima on a morning flight and peruse a fruit market. Then board your evening flight home.

### Day 10: Arrive home



## LOCAL INSIGHT AND SUPPORT

Your Field Director deepens your connection to the land, people, and indigenous culture. With local perspective on community challenges and skilled training in service leadership, they'll provide insight and global context, as they:

- Lead skill-building workshops and meaningful group reflections
- Connect you with local nonprofits and nearby villages
- Facilitate group orientation and safety training
- Handle all on-tour details, from meals to transportation



**Everything you get:** 8 overnight stays in hotels; round-trip flights on major carriers; daily breakfast and dinner, as well as lunch on days 5-8; local ground transportation; full-time Field Director; sustainable service projects; service hours that count toward academic credit; sightseeing tours led by expert guides; entrance fees

**OFFICE OF THE VICE PRESIDENT OF  
FINANCE AND ADMINISTRATIVE SERVICES**

***Julie Martin Jakway, Vice President***

**TO:** State College of Florida, Manatee – Sarasota  
District Board of Trustees

**FROM:** Julie Martin Jakway  
Vice President of Finance and Administrative Services

**SUBJECT:** *Monthly Financial Report – September 2024*

**Two Year Programs**

The report for Two Year Programs presents the Budget and Year-To-Date Revenue and Expense for this fiscal year and last fiscal year as of September 30, 2024.

Student Fees revenue for the current year is flat compared to the same period last year. Other Student Fees revenue decreased by 18% over Other Student Fees reported through September of last year. This is mainly due to a timing issue regarding the collection of other student fees. This will correct itself in future months. Support from Local Government increased by 18% over Support from Local Government through September of last year. This increase is due to earlier invoicing of dual enrollment in the current year. State Support decreased by 1% over State Support through September of last year.

In the category of Expenses, overall Personnel costs are 8% higher as compared to last September. Services expenses increased 122% and Materials and Supplies expenses increased 18% compared to September of last year. Services expenses increased mainly due to insurance being paid earlier than usual and increased contractual services. Materials and Supplies expense increase is due to increases in data software and minor equipment. Other Current Charges increased 6% compared to the same category through September of last year.

With this 25% complete, personnel costs are at 16% of the amount budgeted for the current year, higher compared to the three-year average for this time of year of 15%. Current expenses represent 24% of the amount budgeted, higher than the three-year average of 19% this time of year.

***In summary, with the year 25% complete:***

- Year-To-Date Actual Revenue is 29% of the Adjusted Budget, which is flat compared with the three-year average of 29% for this time of year.
- Year-To-Date Actual Expense is 30% of the Adjusted Budget, which is higher than the three-year average of 20% for this time of year.
- Revenues are higher and expenses are lower as would be expected as a percentage of budget basis.

**Baccalaureate Programs**

Total Revenue for Baccalaureate Programs consists of Student Fees, Other Student Fees, and Other Revenue. Total Revenue as of September 30, 2024, totaled \$676,328, compared to the three-year average of \$636,873. Student Fees revenue is \$582,903 and Other Student Fees revenue is \$48,306, compared to the three-year average of \$556,477 and \$45,864, respectively, for this time of year. Other Revenue is \$45,119 compared to the three-year average of \$34,531 for this time of year. This increase is largely due to higher interest rates in the current year.

Total Expense for Baccalaureate Programs consists of Personnel and Current expenses. Total Expense is \$263,192, with Personnel totaling \$232,627 and Current Expense totaling \$30,565, compared to the three-year average of \$235,671, \$219,122, and \$17,526, respectively, for this time of year.

On a percentage basis, Total Revenue is 35% of that budgeted compared to the three-year average of 37% for this time of year. Total Expense is 15% of that budgeted, which is slightly higher than the 14% three-year average for this time of year.

### **Collegiate School – Bradenton Campus**

Total Revenue for Collegiate School – Bradenton Campus consists of Support from Local Government, State Support, Federal Support, and Other Revenue. Total Revenue as of September 30, 2024, totaled \$1,245,244 compared to the three-year average of \$1,088,252. Support from Local Government is \$1,050,273 compared to the three-year average of \$997,020 for this time of year. State Support is \$0 compared to the three-year average of \$39,246 for this time of year. Federal Support is \$162,833 compared to the three-year average of \$28,059 for this time of year. This change is due to accruing ESSER grants funds in previous fiscal years. All ESSER funds have been expensed at this time. Other Revenue is \$32,139 compared to the three-year average of \$23,927 for this time of year. This increase is driven by the rise in interest rates in the current fiscal year.

Total Expense for Collegiate School – Bradenton Campus consists of Personnel, Current and Capital Outlay expenses. Total Expense is \$837,700, with Personnel totaling \$498,167, Current Expense totaling \$171,276 and Capital Outlay expenses totaling \$168,257 during the period. These figures compared to the three-year averages of \$682,997, \$428,370, \$117,153, and \$137,473, respectively, for this time of year.

On a percentage basis, Total Revenue is 28% of that budgeted, higher than the three-year average of 25% for this time of year. Total Expense is 16% of that budgeted, less than the three-year average of 19% for this time of year.

### **Collegiate School – Venice Campus**

Total Revenue for Collegiate School – Venice Campus consists of Support from Local Government, State Support, Federal Support, and Other Revenue. Total Revenue as of September 30, 2024, totaled \$850,032 compared to the three-year average of \$564,160. Support from Local Government is \$797,890 compared to the three-year average of \$562,405 for this time of year. State Support is \$55,616 compared to the three-year average of \$20,007. Federal Support is \$1,153 compared to the three-year average of \$(21,712) for this time of year. This change is due to accruing ESSER grants funds in previous fiscal years. All ESSER funds have been expensed at this time. Other Revenue is \$5,373 compared to the three-year average of \$3,460 for this time of year.

Total Expense for Collegiate School – Venice Campus consists of Personnel, Current and Capital Outlay expenses. Total Expense is \$266,197, with Personnel totaling \$230,792, Current Expense totaling \$32,205 and Capital Outlay expenses totaling \$3,200 during the period. These figures compared to the three-year averages of \$429,423, \$210,823, \$50,005, and \$168,594, respectively, for this time of year. The total expense and capital outlay increases in three-year averages are related to a large increase in capital outlay expenses in September 2022.

On a percentage basis, Total Revenue is 32% of that budgeted, more than the three-year average of 25% for this time of year. Total Expense is 10% of that budgeted, which is less than the three-year average of 17% for this time of year.

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Lower Level Programs - Fund 11000

| AC Type Description                    | September 30, 2024 |                   |                   |                            | September 30, 2023 |                   |                   |                            | Percent Change<br>CY YTD Actual/<br>PY YTD Actual |
|----------------------------------------|--------------------|-------------------|-------------------|----------------------------|--------------------|-------------------|-------------------|----------------------------|---------------------------------------------------|
|                                        | Orig Budget        | Adj Budget        | YTD Actual        | YTD Actual /<br>Adj Budget | Orig Budget        | Adj Budget        | YTD Actual        | YTD Actual /<br>Adj Budget |                                                   |
| <b>Revenue</b>                         |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| 41 Student Fees                        | 13,835,060         | 13,835,060        | 6,215,211         | 45%                        | 13,679,170         | 13,679,170        | 6,231,855         | 46%                        | 0%                                                |
| 42 Other Student Fees                  | 3,950,858          | 3,950,858         | 1,213,398         | 31%                        | 3,678,121          | 3,678,121         | 1,482,183         | 40%                        | -18%                                              |
| 43 Support From Local Government [1]   | 1,447,861          | 1,447,861         | 829,929           | 57%                        | 1,343,347          | 1,343,347         | 700,437           | 52%                        | 18%                                               |
| 44 State Support                       | 35,579,924         | 33,871,248        | 8,018,370         | 24%                        | 35,999,152         | 35,999,152        | 8,107,243         | 23%                        | -1%                                               |
| 45 Federal Support                     | 3,026,000          | 3,026,000         | 37,266            | 1%                         | 26,000             | 3,876,000         | 55,120            | 1%                         |                                                   |
| 46 Gifts, Private Grants & Contracts   | 0                  | 0                 | 0                 |                            | 0                  | 0                 | 0                 |                            |                                                   |
| 47 Sales and Services Department       | 977,364            | 977,364           | 455,744           | 47%                        | 827,665            | 827,665           | 317,328           | 38%                        | 44%                                               |
| 49 Other Revenue [2]                   | 1,173,320          | 1,173,320         | 310,314           | 26%                        | 476,544            | 502,544           | 264,027           | 53%                        | 18%                                               |
| 4A Non-Revenue Receipts [3]            | 275,268            | 277,768           | (1,002)           |                            | 296,548            | 296,548           | 0                 | 0%                         | 0%                                                |
| <b>Total : Revenue</b>                 | <b>60,265,655</b>  | <b>58,559,479</b> | <b>17,079,231</b> | <b>29%</b>                 | <b>56,326,547</b>  | <b>60,202,547</b> | <b>17,158,193</b> | <b>29%</b>                 | <b>0%</b>                                         |
| <b>Grand Total : Revenue</b>           | <b>60,265,655</b>  | <b>58,559,479</b> | <b>17,079,231</b> | <b>29%</b>                 | <b>56,326,547</b>  | <b>60,202,547</b> | <b>17,158,193</b> | <b>29%</b>                 | <b>0%</b>                                         |
| <b>Expense</b>                         |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| <b>Personnel</b>                       |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| 51 Salaries-Full Time & Perm Part Time | 26,959,740         | 27,240,563        | 4,420,526         | 16%                        | 25,165,669         | 25,167,669        | 4,095,056         | 16%                        | 8%                                                |
| 52 Other Personnel Exp P/T (Non-Perm)  | 3,756,892          | 3,765,292         | 410,317           | 11%                        | 3,709,408          | 3,709,408         | 437,251           | 12%                        | -6%                                               |
| 53 Personnel Benefits                  | 11,695,362         | 11,359,372        | 1,952,788         | 17%                        | 11,991,426         | 11,991,426        | 1,739,263         | 15%                        | 12%                                               |
| <b>Total : Personnel</b>               | <b>42,411,994</b>  | <b>42,365,227</b> | <b>6,783,632</b>  | <b>16%</b>                 | <b>40,866,503</b>  | <b>40,868,503</b> | <b>6,271,570</b>  | <b>15%</b>                 | <b>8%</b>                                         |
| <b>Current Expense</b>                 |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| 61 Services [4]                        | 15,293,290         | 15,522,350        | 4,593,716         | 30%                        | 11,146,170         | 15,072,032        | 2,066,235         | 14%                        | 122%                                              |
| 62 Materials and Supplies              | 4,289,406          | 4,321,758         | 712,060           | 16%                        | 4,114,207          | 4,255,161         | 605,375           | 14%                        | 18%                                               |
| 63 Other Current Charges [5]           | 5,508,677          | 3,783,855         | 319,909           | 8%                         | 6,608,353          | 6,539,463         | 302,389           | 5%                         | 6%                                                |
| <b>Total : Current Expense</b>         | <b>25,091,373</b>  | <b>23,627,964</b> | <b>5,625,685</b>  | <b>24%</b>                 | <b>21,868,730</b>  | <b>25,866,655</b> | <b>2,973,999</b>  | <b>11%</b>                 | <b>89%</b>                                        |
| <b>Capital</b>                         |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| 71 Capital Outlay                      | 2,013,000          | 2,027,606         | 23,212            | 1%                         | 1,145,586          | 1,169,526         | 15,545            | 1%                         |                                                   |
| <b>Total : Capital</b>                 | <b>2,013,000</b>   | <b>2,027,606</b>  | <b>23,212</b>     | <b>1%</b>                  | <b>1,145,586</b>   | <b>1,169,526</b>  | <b>15,545</b>     | <b>1%</b>                  |                                                   |
| <b>Grand Total : Expense</b>           | <b>69,516,367</b>  | <b>68,020,796</b> | <b>12,432,529</b> | <b>18%</b>                 | <b>63,880,819</b>  | <b>67,904,684</b> | <b>9,261,114</b>  | <b>14%</b>                 | <b>34%</b>                                        |
| <b>Transfers</b>                       |                    |                   |                   |                            |                    |                   |                   |                            |                                                   |
| 69 Other Transfers                     | 0                  | 0                 | 8,300,000         |                            | 0                  | 0                 | 0                 |                            |                                                   |
| <b>Total : Transfers</b>               | <b>0</b>           | <b>0</b>          | <b>8,300,000</b>  |                            | <b>0</b>           | <b>0</b>          | <b>0</b>          |                            |                                                   |

[1] Dual enrollment revenue  
[2] Includes interest and dividends, fines and penalties, bad debt recoveries and miscellaneous revenue  
[3] Includes non-mandatory transfers in, proceeds from fixed asset sales, over and short, lost revenue recovery from CARES  
[4] Includes travel, postage, phone, printing, repairs, service agreements, utilities, advertising, temp svcs, consultants and professional fees, and contractors  
[5] Includes central store, scholarships, fee waivers, bad debt expense, unemployment comp and uninsured losses

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Upper Level Programs - Fund 12000

| AC<br>Type | Description                         | September 30, 2024 |                  |                |            | September 30, 2023 |                  |                |            | Percent<br>Change<br>CY YTD Actual/<br>PY YTD Actual |
|------------|-------------------------------------|--------------------|------------------|----------------|------------|--------------------|------------------|----------------|------------|------------------------------------------------------|
|            |                                     | Orig Budget        | Adj Budget       | YTD Actual     | Adj Budget | Orig Budget        | Adj Budget       | YTD Actual     | Adj Budget |                                                      |
|            | <b>Revenue</b>                      |                    |                  |                |            |                    |                  |                |            |                                                      |
| 41         | Student Fees                        | 1,439,766          | 1,439,766        | 582,903        | 40%        | 1,302,969          | 1,302,969        | 553,359        | 42%        | 5%                                                   |
| 42         | Other Student Fees                  | 140,149            | 140,149          | 48,306         | 34%        | 123,689            | 123,689          | 40,342         | 33%        | 20%                                                  |
| 44         | State Support                       | 178,164            | 178,164          | 0              | 0%         | 178,164            | 178,164          | 0              | 0%         | 0%                                                   |
| 49         | Other Revenue [1]                   | 159,183            | 159,183          | 45,119         | 28%        | 68,438             | 68,438           | 43,529         | 64%        | 6%                                                   |
|            | <b>Total : Revenue</b>              | <b>1,917,262</b>   | <b>1,917,262</b> | <b>676,328</b> | <b>35%</b> | <b>1,673,260</b>   | <b>1,673,260</b> | <b>637,231</b> | <b>38%</b> | <b>6%</b>                                            |
|            | <b>Grand Total : Revenue</b>        | <b>1,917,262</b>   | <b>1,917,262</b> | <b>676,328</b> | <b>35%</b> | <b>1,673,260</b>   | <b>1,673,260</b> | <b>637,231</b> | <b>38%</b> | <b>6%</b>                                            |
|            | <b>Expense</b>                      |                    |                  |                |            |                    |                  |                |            |                                                      |
|            | <b>Personnel</b>                    |                    |                  |                |            |                    |                  |                |            |                                                      |
| 51         | Salaries-Full Time & Perm Part Time | 813,108            | 820,108          | 121,197        | 15%        | 800,253            | 800,253          | 117,810        | 15%        | 3%                                                   |
| 52         | Other Personnel Exp P/T (Non-Perm)  | 363,600            | 363,600          | 70,119         | 19%        | 400,451            | 400,451          | 74,119         | 19%        | -5%                                                  |
| 53         | Personnel Benefits                  | 394,129            | 394,665          | 41,310         | 10%        | 259,408            | 259,408          | 41,261         | 16%        | 0%                                                   |
|            | <b>Total : Personnel</b>            | <b>1,570,837</b>   | <b>1,578,373</b> | <b>232,627</b> | <b>15%</b> | <b>1,460,112</b>   | <b>1,460,112</b> | <b>233,190</b> | <b>16%</b> | <b>0%</b>                                            |
|            | <b>Current Expense</b>              |                    |                  |                |            |                    |                  |                |            |                                                      |
| 61         | Services [2]                        | 34,675             | 33,525           | 663            | 2%         | 35,755             | 34,255           | 1,199          | 3%         | -45%                                                 |
| 62         | Materials and Supplies              | 86,143             | 86,136           | 201            | 0%         | 83,777             | 86,777           | 268            | 0%         | -25%                                                 |
| 63         | Other Current Charges [3]           | 93,616             | 93,616           | 29,701         | 32%        | 93,616             | 93,616           | 2,690          | 3%         | 0%                                                   |
|            | <b>Total : Current Expense</b>      | <b>214,434</b>     | <b>213,277</b>   | <b>30,564</b>  | <b>14%</b> | <b>213,148</b>     | <b>214,648</b>   | <b>4,157</b>   | <b>2%</b>  | <b>635%</b>                                          |
|            | <b>Capital</b>                      |                    |                  |                |            |                    |                  |                |            |                                                      |
| 71         | Capital Outlay                      | 0                  | 0                | 0              |            | 0                  | 0                | 0              |            |                                                      |
|            | <b>Total : Capital</b>              | <b>0</b>           | <b>0</b>         | <b>0</b>       |            | <b>0</b>           | <b>0</b>         | <b>0</b>       |            |                                                      |
|            | <b>Grand Total : Expense</b>        | <b>1,785,271</b>   | <b>1,791,650</b> | <b>263,191</b> | <b>15%</b> | <b>1,673,260</b>   | <b>1,674,760</b> | <b>237,347</b> | <b>14%</b> | <b>11%</b>                                           |

[1] Includes interest and dividends, fines and penalties, bad debt recoveries and miscellaneous revenue  
[2] Includes travel, postage, phone, printing, repairs, service agreements, utilities, advertising, temp svcs, consultants and professional fees, and contractors  
[3] Includes central store, scholarships, fee waivers and bad debt expense

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

**RESOLUTION NUMBER: Nine (09)  
AMENDMENT NUMBER: Nine (09)**

**FISCAL YEAR: 2024-25  
September 2024**

FUND NAME: CURRENT UNRESTRICTED

FUND NUMBER: 11000

| CATEGORY                  | PRESENT              |                 |                 | REVISED              |
|---------------------------|----------------------|-----------------|-----------------|----------------------|
|                           | BUDGET               | INCREASE        | DECREASE        | BUDGET               |
| Beginning Fund Balance    | \$ 21,722,247        | \$              | \$              | \$ 21,722,247        |
| REVENUE                   | 58,559,479           |                 |                 | 58,559,479           |
| TOTAL TO BE ACCOUNTED FOR | <u>\$ 80,281,726</u> | <u>\$ 0</u>     | <u>\$ 0</u>     | <u>\$ 80,281,726</u> |
| SALARIES                  | \$ 42,365,227        | \$              |                 | 42,365,227           |
| CURRENT EXPENSE           | 23,148,880           | 5,889           | <a>             | 23,154,769           |
| CAPITAL OUTLAY            | 1,033,478            |                 | <b> 5,872       | 1,027,606            |
| ENDING FUND BALANCE       | 13,734,141           |                 | <c> 17          | 13,734,158           |
| TOTAL ACCOUNTED FOR       | <u>\$ 80,281,726</u> | <u>\$ 5,889</u> | <u>\$ 5,889</u> | <u>\$ 80,281,760</u> |

JUSTIFICATION:

- <a> The \$5,889 increase in Current Expense is due to:
  - Decrease in budget for laptop for new recruiter (1,128)
  - Increase in budget for Trac Cloud software purchase for TASC 7,000
  - Increase in budget to reimburse HSA for name badges 17
  - \$ 5,889
  
- <b> The \$5,872 decrease in Capital Outlay is due to:
  - Decrease in budget for Trac Cloud software purchase for TASC (7,000)
  - Increase in budget for laptop for new recruiter 1,128
  - \$ (5,872)
  
- <c> The \$17 decrease in fund balance is due to:
  - Decrease in fund balance to reimburse HSA for name badges (17)
  - (17)



**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

**RESOLUTION NUMBER: Ten (10)  
AMENDMENT NUMBER: Ten (10)**

**FISCAL YEAR: 2024-25  
September 2024**

FUND NAME: Upper Division Fund

FUND NUMBER: 12000

| CATEGORY                  | PRESENT BUDGET | INCREASE | DECREASE | REVISED BUDGET |
|---------------------------|----------------|----------|----------|----------------|
| Beginning Fund Balance    | \$ 3,833,338   | \$       | \$       | \$ 3,833,338   |
| REVENUE                   | 1,917,262      |          |          | 1,917,262      |
| TOTAL TO BE ACCOUNTED FOR | \$ 5,750,600   | \$ 0     | 0        | \$ 5,750,600   |
| SALARIES                  | \$ 1,578,373   | \$       |          | \$ 1,578,373   |
| CURRENT EXPENSE           | 213,294        | <a>      | 17       | 213,277        |
| CAPITAL OUTLAY            | 0              |          |          | 0              |
| ENDING FUND BALANCE       | 3,958,933      | 17 <b>   |          | 3,958,950      |
| TOTAL ACCOUNTED FOR       | \$ 5,750,600   | \$ 17    | \$ 17    | \$ 5,750,600   |

JUSTIFICATION:

<a> The \$17 decrease in Current Expense is due :  
Decrease in budget for reimbursement for name badges for HSA

(17)  
(17)

<b> The \$17 increase in Fund Balance is due  
Decrease in budget for reimbursement for name badges for HSA

\$ 17  
17

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

RESOLUTION NUMBER: Eleven (11)  
AMENDMENT NUMBER: Eleven (11)

FISCAL YEAR: 2024-25  
September 2024

FUND NAME: GENERAL RESTRICTED

FUND NUMBER: TWO

| CATEGORY                  | PRESENT BUDGET | INCREASE    | DECREASE   | REVISED BUDGET |
|---------------------------|----------------|-------------|------------|----------------|
| Beginning Fund Balance    | \$ 2,071,953   | \$          | \$         | \$ 2,071,953   |
| REVENUE                   | 9,489,347      | <a>         | 317,424    | 9,171,923      |
| TOTAL TO BE ACCOUNTED FOR | \$ 11,561,300  | \$ 0        | \$ 317,424 | \$ 11,243,876  |
| SALARIES                  | \$ 6,154,857   | \$ <b>      | 22,357     | 6,132,500      |
| CURRENT EXPENSE           | 3,405,801      | 145,075 <c> |            | 3,550,877      |
| CAPITAL OUTLAY            | 134,586        |             |            | 134,586        |
| ENDING FUND BALANCE       | 1,866,056      | <d>         | 440,142    | 1,425,914      |
| TOTAL ACCOUNTED FOR       | \$ 11,561,300  | \$ 145,075  | \$ 462,499 | \$ 11,243,876  |

JUSTIFICATION:

|                                                                                  |                     |
|----------------------------------------------------------------------------------|---------------------|
| <a> The \$317,424 decrease in Revenue is due to:                                 |                     |
| Decrease in budget to align Trio grant with grant revenue                        | <u>(317,424)</u>    |
|                                                                                  | \$ <u>(317,424)</u> |
| <b> The \$22,357 decrease in Salaries Expense is due to:                         |                     |
| Increase in budget for salaries for Trio grant to align with grant budget        | 214,806             |
| Decrease in original budget to align Trio grant with grant salary expenses       | <u>(237,163)</u>    |
|                                                                                  | \$ <u>(22,357)</u>  |
| <c> The \$145,075 increase in Current Expense is due to:                         |                     |
| Increase in budget to establish FY 25 Wellness budget                            | 82,244              |
| Increase in budget for Counseling services                                       | 125,000             |
| Increase in budget to align Trio grant with grant current expenses               | 80,570              |
| Decrease in original budget to align Trio grant with grants current expense      | <u>(142,739)</u>    |
|                                                                                  | \$ <u>145,075</u>   |
| <d> The \$440,142 decrease to fund balance is due to:                            |                     |
| Alignment of Trio grant and addition of Counseling services and Wellness budgets | <u>(440,142)</u>    |
|                                                                                  | \$ <u>(440,142)</u> |

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

RESOLUTION NUMBER: Twelve (12)  
AMENDMENT NUMBER: Twelve (12)

FISCAL YEAR: 2024-25  
September 2024

FUND NAME: UNEXPENDED PLANT FUND

FUND NUMBER: SEVEN

| CATEGORY                  | PRESENT       |            |           | REVISED       |
|---------------------------|---------------|------------|-----------|---------------|
|                           | BUDGET        | INCREASE   | DECREASE  | BUDGET        |
| Beginning Fund Balance    | \$ 24,425,514 | \$         | \$        | \$ 24,425,514 |
| REVENUE                   | 53,166,883    |            |           | 53,166,883    |
| TOTAL TO BE ACCOUNTED FOR | \$ 77,592,397 | \$ 0       | 0         | \$ 77,592,397 |
| SALARIES                  | \$ 309,775    | \$         |           | 309,775       |
| CURRENT EXPENSE           | 174,838       | <a>        | 55,253    | 119,585       |
| CAPITAL OUTLAY            | 26,510,859    | <b>        | 10,581    | 26,500,278    |
| ENDING FUND BALANCE       | 50,596,925    | 65,835 <c> |           | 50,662,760    |
| TOTAL ACCOUNTED FOR       | \$ 77,592,397 | \$ 0       | \$ 65,835 | \$ 77,592,397 |

JUSTIFICATION:

<a> The \$55,253 decrease in Current Expense is due to:

Decrease in budget to align beginning budget rolloffward  
Increase in budget for LWR room 206 furniture renovation

|    |                 |
|----|-----------------|
|    | (56,903)        |
|    | 1,650           |
| \$ | <u>(55,253)</u> |

<b> The \$10,581 decrease in Capital Outlay is due to:

Decrease in budget to align beginning budget rolloffward  
Decrease in budget for LWR room 206 furniture renovation  
Increase in budget for CO&DS roof repairs, CIF maintenance

|  |                 |
|--|-----------------|
|  | (128,931)       |
|  | (1,650)         |
|  | 120,000         |
|  | <u>(10,581)</u> |

<c> The \$65,834 increase in Ending Fund Balance is due to:

Establish and adjust FY 25 budgets

|  |               |
|--|---------------|
|  | 65,834        |
|  | <u>65,834</u> |

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Collegiate School - Bradenton Campus

| AC Type Description                    | September 30, 2024 |                  |                  |                            | September 30, 2023 |                  |                  |            | Percent Change<br>CY YTD Actual/<br>PY YTD Actual |
|----------------------------------------|--------------------|------------------|------------------|----------------------------|--------------------|------------------|------------------|------------|---------------------------------------------------|
|                                        | Orig Budget        | Adj Budget       | YTD Actual       | YTD Actual /<br>Adj Budget | Percent            | Orig Budget      | Adj Budget       | YTD Actual |                                                   |
| <b>Revenue</b>                         |                    |                  |                  |                            |                    |                  |                  |            |                                                   |
| 43 Support From Local Government [1]   | 4,492,106          | 4,492,106        | 1,050,273        | 23%                        | 3,954,102          | 4,122,643        | 1,046,279        | 25%        | 0%                                                |
| 44 State Support [2]                   | 0                  | 0                | 0                |                            | 40                 | 40               | 51,403           |            | -100%                                             |
| 45 Federal Support [3]                 | 27,268             | 27,268           | 162,833          |                            | 27,268             | 27,268           | (43,317)         | -159%      |                                                   |
| 49 Other Revenue [4]                   | 0                  | 0                | 32,139           |                            | 79,430             | 79,430           | 28,662           | 36%        | 12%                                               |
| <b>Total : Revenue</b>                 | <b>4,519,374</b>   | <b>4,519,374</b> | <b>1,245,244</b> | <b>28%</b>                 | <b>4,060,840</b>   | <b>4,229,381</b> | <b>1,083,025</b> | <b>26%</b> | <b>15%</b>                                        |
| <b>Grand Total : Revenue</b>           | <b>4,519,374</b>   | <b>4,519,374</b> | <b>1,245,244</b> | <b>28%</b>                 | <b>4,060,840</b>   | <b>4,229,381</b> | <b>1,083,025</b> | <b>26%</b> | <b>15%</b>                                        |
| <b>Expense</b>                         |                    |                  |                  |                            |                    |                  |                  |            |                                                   |
| <b>Personnel</b>                       |                    |                  |                  |                            |                    |                  |                  |            |                                                   |
| 51 Salaries-Full Time & Perm Part Time | 2,497,195          | 2,497,695        | 368,814          | 14%                        | 1,834,689          | 1,834,689        | 335,267          | 18%        | 7%                                                |
| 52 Other Personnel Exp P/T (Non-Perm)  | 59,520             | 59,520           | (3,010)          | -5%                        | 59,520             | 59,520           | 2,894            | 5%         | 1%                                                |
| 53 Personnel Benefits                  | 732,988            | 733,026          | 142,363          | 19%                        | 732,988            | 732,988          | 140,926          | 19%        | 4%                                                |
| <b>Total : Personnel</b>               | <b>3,289,703</b>   | <b>3,290,241</b> | <b>498,167</b>   | <b>15%</b>                 | <b>2,627,197</b>   | <b>2,627,197</b> | <b>479,087</b>   | <b>18%</b> |                                                   |
| <b>Current Expense</b>                 |                    |                  |                  |                            |                    |                  |                  |            |                                                   |
| 61 Services [5]                        | 1,235,145          | 1,168,402        | 37,483           | 3%                         | 1,065,835          | 1,069,936        | 53,394           | 5%         | -30%                                              |
| 62 Materials and Supplies              | 295,214            | 371,897          | 133,792          | 36%                        | 269,154            | 269,154          | 93,629           | 35%        | 43%                                               |
| 63 Other Current Charges               | 0                  | 0                | 0                |                            | 0                  | 0                | 0                |            |                                                   |
| <b>Total : Current Expense</b>         | <b>1,530,360</b>   | <b>1,540,299</b> | <b>171,276</b>   | <b>11%</b>                 | <b>1,334,989</b>   | <b>1,339,090</b> | <b>147,023</b>   | <b>11%</b> | <b>16%</b>                                        |
| <b>Capital</b>                         |                    |                  |                  |                            |                    |                  |                  |            |                                                   |
| 71 Capital Outlay                      | 296,899            | 333,992          | 168,257          | 50%                        | 538,038            | 655,980          | 288,184          | 44%        |                                                   |
| <b>Total : Capital</b>                 | <b>296,899</b>     | <b>333,992</b>   | <b>168,257</b>   | <b>50%</b>                 | <b>538,038</b>     | <b>655,980</b>   | <b>288,184</b>   | <b>44%</b> |                                                   |
| <b>Grand Total : Expense</b>           | <b>5,116,962</b>   | <b>5,164,533</b> | <b>837,701</b>   | <b>16%</b>                 | <b>4,500,223</b>   | <b>4,622,267</b> | <b>914,294</b>   | <b>20%</b> | <b>-8%</b>                                        |

[1] Includes revenue from Manatee County school district  
 [2] Includes capital funding from Manatee County school district  
 [3] Includes grant revenue  
 [4] Includes interest and dividend, teacher supply funds and Best & Brightest Scholarships awarded by Manatee County school board.  
 [5] Includes travel, postage, printing, lease, insurance, contracted services (including DE), and professional fees

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Collegiate School - Venice Campus

| AC<br>Type Description                 | September 30, 2024 |                  |                |                            |                            | September 30, 2023 |                |            |                            |                            |  |  |
|----------------------------------------|--------------------|------------------|----------------|----------------------------|----------------------------|--------------------|----------------|------------|----------------------------|----------------------------|--|--|
|                                        | Orig Budget        | Adj Budget       | YTD Actual     | Percent                    |                            | Orig Budget        | Adj Budget     | YTD Actual | Percent                    |                            |  |  |
|                                        |                    |                  |                | YTD Actual /<br>Adj Budget | YTD Actual /<br>YTD Actual |                    |                |            | YTD Actual /<br>Adj Budget | YTD Actual /<br>YTD Actual |  |  |
| <b>Revenue</b>                         |                    |                  |                |                            |                            |                    |                |            |                            |                            |  |  |
| 43 Support From Local Government [1]   | 2,613,647          | 2,613,647        | 787,890        | 30%                        | 2,364,033                  | 2,364,033          | 368,709        | 16%        | 114%                       |                            |  |  |
| 44 State Support [2]                   | 0                  | 0                | 55,616         |                            | 0                          | 0                  | 0              |            |                            |                            |  |  |
| 45 Federal Support [3]                 | 12,680             | 12,680           | 1,153          | 9%                         | 30,000                     | 30,000             | (66,288)       | -221%      | -102%                      |                            |  |  |
| 49 Other Revenue [4]                   | 3,000              | 3,000            | 5,373          | 179%                       | 2,000                      | 2,000              | 3,620          | 181%       |                            |                            |  |  |
| 4A Non-Revenue Receipts                | 0                  | 0                | 0              |                            | 0                          | 0                  | 0              |            |                            |                            |  |  |
| <b>Total : Revenue</b>                 | <b>2,629,327</b>   | <b>2,629,327</b> | <b>850,032</b> | <b>32%</b>                 | <b>2,396,033</b>           | <b>2,396,033</b>   | <b>306,042</b> | <b>13%</b> | <b>178%</b>                |                            |  |  |
| <b>Grand Total : Revenue</b>           | <b>2,629,327</b>   | <b>2,629,327</b> | <b>850,032</b> | <b>32%</b>                 | <b>2,396,033</b>           | <b>2,396,033</b>   | <b>306,042</b> | <b>13%</b> | <b>178%</b>                |                            |  |  |
| <b>Expense</b>                         |                    |                  |                |                            |                            |                    |                |            |                            |                            |  |  |
| <b>Personnel</b>                       |                    |                  |                |                            |                            |                    |                |            |                            |                            |  |  |
| 51 Salaries-Full Time & Perm Part Time | 1,124,871          | 1,124,871        | 164,454        | 15%                        | 1,044,146                  | 1,044,146          | 149,035        | 14%        | 10%                        |                            |  |  |
| 52 Other Personnel Exp P/T (Non-Perm)  | 25,000             | 25,000           | 865            | 3%                         | 17,000                     | 17,000             | 4,258          | 25%        | -80%                       |                            |  |  |
| 53 Personnel Benefits                  | 367,987            | 367,987          | 65,474         | 18%                        | 359,599                    | 359,599            | 60,348         | 17%        | 8%                         |                            |  |  |
| <b>Total : Personnel</b>               | <b>1,517,858</b>   | <b>1,517,858</b> | <b>230,792</b> | <b>15%</b>                 | <b>1,420,745</b>           | <b>1,420,745</b>   | <b>213,641</b> | <b>15%</b> | <b>8%</b>                  |                            |  |  |
| <b>Current Expense</b>                 |                    |                  |                |                            |                            |                    |                |            |                            |                            |  |  |
| 61 Services [5]                        | 800,958            | 816,958          | 15,971         | 2%                         | 547,840                    | 547,840            | (1,452)        | 0%         | -1200%                     |                            |  |  |
| 62 Materials and Supplies              | 230,356            | 214,356          | 16,234         | 8%                         | 184,687                    | 193,739            | 12,201         | 6%         | 33%                        |                            |  |  |
| <b>Total : Current Expense</b>         | <b>1,031,314</b>   | <b>1,031,314</b> | <b>32,205</b>  | <b>3%</b>                  | <b>732,527</b>             | <b>741,579</b>     | <b>10,750</b>  | <b>1%</b>  | <b>200%</b>                |                            |  |  |
| <b>Capital</b>                         |                    |                  |                |                            |                            |                    |                |            |                            |                            |  |  |
| Capital Outlay                         | 5,000              | 27,305           | 3,200          | 12%                        | 5,000                      | 11,533             | 0              | 0%         |                            |                            |  |  |
| <b>Total : Capital</b>                 | <b>5,000</b>       | <b>27,305</b>    | <b>3,200</b>   | <b>12%</b>                 | <b>5,000</b>               | <b>11,533</b>      | <b>0</b>       | <b>0%</b>  |                            |                            |  |  |
| <b>Grand Total : Expense</b>           | <b>2,554,172</b>   | <b>2,576,477</b> | <b>266,197</b> | <b>10%</b>                 | <b>2,158,272</b>           | <b>2,173,858</b>   | <b>224,391</b> | <b>10%</b> | <b>19%</b>                 |                            |  |  |

[1] Includes revenue from Sarasota County school district  
[2] Includes capital funding from Sarasota County school district  
[3] Includes grant revenue  
[4] Includes interest and dividends revenue  
[5] Includes travel, postage, printing, lease, insurance, contracted services (including DE), and professional fees

## ACCEPTANCE OF GIFTS AND GRANTS

It is respectfully requested the District Board of Trustees of State College of Florida, Manatee-Sarasota accept and approve the following gifts and grants.

### September 2024

| <u>DONOR/GRANTOR</u>                          | <u>AMOUNT</u> | <u>DESCRIPTION</u> |
|-----------------------------------------------|---------------|--------------------|
| <b><u>Gifts:</u></b>                          |               |                    |
| No gifts received                             |               |                    |
| <b><u>Grants:</u></b>                         |               |                    |
| United States Department of Education         |               |                    |
| September YTD Revenue                         | 686,453       |                    |
| August YTD Revenue                            | 686,544       |                    |
| Change for Month of September                 | (91)          | Pell Grant 2023-24 |
| September YTD Revenue                         | -             |                    |
| August YTD Revenue                            | -             |                    |
| Change for Month of September                 | -             | Pell Grant 2024-25 |
| <b>Total Received - Gifts</b>                 | -             |                    |
| <b>Total Received (Returned) - Pell Grant</b> | <b>(91)</b>   |                    |

**OFFICE OF THE VICE PRESIDENT OF  
FINANCE AND ADMINISTRATIVE SERVICES**

***Julie Martin Jakway, Vice President***

**TO:** State College of Florida, Manatee – Sarasota  
District Board of Trustees

**FROM:** Julie Martin Jakway  
Vice President of Finance and Administrative Services

**SUBJECT:** *Monthly Financial Report – October 2024*

**Two Year Programs**

The report for Two Year Programs presents the Budget and Year-To-Date Revenue and Expense for this fiscal year and last fiscal year as of October 31, 2024.

Student Fees revenue for the current year is lower compared to the same period last year. This is due to the timing of fee payment dates. Other Student Fees revenue decreased by 14% over Other Student Fees reported through October of last year. This is mainly due to a timing issue regarding the collection of other student fees. This will correct itself in future months. Support from Local Government increased by 18% over Support from Local Government through October of last year. This increase is due to earlier invoicing of dual enrollment in the current year. State Support decreased by 1% over State Support through October of last year.

In the category of Expenses, overall Personnel costs are 6% higher as compared to last October. Services expenses increased 67% and Materials and Supplies expenses decreased by 9% compared to October of last year. Services expenses increased mainly due to insurance being paid earlier than usual and increased contractual services. Materials and Supplies decrease is due to a decrease in data software purchases in the current year. Other Current Charges increased 2% compared to the same category through October of last year.

With this 33% complete, personnel costs are at 23% of the amount budgeted for the current year, which is flat compared to the three-year average for this time of year of 23%. Current expenses represent 29% of the amount budgeted, higher than the three-year average of 24% this time of year.

***In summary, with the year 33% complete:***

- Year-To-Date Actual Revenue is 40% of the Adjusted Budget, which is flat compared with the three-year average of 40% for this time of year.
- Year-To-Date Actual Expense is 37% of the Adjusted Budget, which is higher than the three-year average of 27% for this time of year.
- Revenues are higher and expenses are lower as would be expected as a percentage of budget basis.

**Baccalaureate Programs**

Total Revenue for Baccalaureate Programs consists of Student Fees, Other Student Fees, and Other Revenue. Total Revenue as of October 31, 2024, totaled \$914,649, compared to the three-year average of \$917,141. Student Fees revenue is \$801,897 and Other Student Fees revenue is \$67,633, compared to the three-year average of \$811,171 and \$69,034, respectively, for this time of year. Other Revenue is \$45,119 compared to the three-year average of \$36,936 for this time of year. This increase is largely due to higher interest rates in the current year.

Total Expense for Baccalaureate Programs consists of Personnel and Current expenses. Total Expense is \$431,389, with Personnel totaling \$388,334 and Current Expense totaling \$43,055, compared to the three-year average of \$383,369, \$356,558, and \$27,788, respectively, for this time of year.

On a percentage basis, Total Revenue is 48% of that budgeted compared to the three-year average of 53% for this time of year. Total Expense is 24% of that budgeted, which is slightly higher than the 23% three-year average for this time of year.



### **Collegiate School – Bradenton Campus**

Total Revenue for Collegiate School – Bradenton Campus consists of Support from Local Government, State Support, Federal Support, and Other Revenue. Total Revenue as of October 31, 2024, totaled \$1,923,047 compared to the three-year average of \$1,564,508. Support from Local Government is \$1,677,671 compared to the three-year average of \$1,442,369 for this time of year. State Support is \$50,405 compared to the three-year average of \$63,693 for this time of year. Federal Support is \$162,833 compared to the three-year average of \$30,770 for this time of year. This change is due to accruing ESSER grants funds in previous fiscal years. All ESSER funds have been expensed at this time. Other Revenue is \$32,139 compared to the three-year average of \$27,676 for this time of year. This increase is driven by the rise in interest rates in the current fiscal year.

Total Expense for Collegiate School – Bradenton Campus consists of Personnel, Current and Capital Outlay expenses. Total Expense is \$1,272,061, with Personnel totaling \$771,620, Current Expense totaling \$332,184 and Capital Outlay expenses totaling \$168,257 during the period. These figures compared to the three-year averages of \$1,211,975, \$728,772, \$292,778, and \$190,425, respectively, for this time of year.

On a percentage basis, Total Revenue is 43% of that budgeted, higher than the three-year average of 30% for this time of year. Total Expense is 25% of that budgeted, flat with the three-year average of 25% for this time of year.

### **Collegiate School – Venice Campus**

Total Revenue for Collegiate School – Venice Campus consists of Support from Local Government, State Support, Federal Support, and Other Revenue. Total Revenue as of October 31, 2024, totaled \$877,018 compared to the three-year average of \$566,848. Support from Local Government is \$787,890 compared to the three-year average of \$549,151 for this time of year. State Support is \$79,708 compared to the three-year average of \$32,326. Federal Support is \$1,153 compared to the three-year average of \$(21,711) for this time of year. This change is due to accruing ESSER grants funds in previous fiscal years. All ESSER funds have been expensed at this time. Other Revenue is \$8,267 compared to the three-year average of \$7,083 for this time of year.

Total Expense for Collegiate School – Venice Campus consists of Personnel, Current and Capital Outlay expenses. Total Expense is \$468,280, with Personnel totaling \$348,125, Current Expense totaling \$117,626 and Capital Outlay expenses totaling \$2,529 during the period. These figures compared to the three-year averages of \$596,649, \$323,048, \$104,340, and \$169,261, respectively, for this time of year.

On a percentage basis, Total Revenue is 33% of that budgeted, more than the three-year average of 24% for this time of year. Total Expense is 18% of that budgeted, which is less than the three-year average of 24% for this time of year.

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Lower Level Programs - Fund 11000

| AC<br>Type Description                 | October 31, 2024  |                            |                            |                   | October 31, 2023           |                            |                            |                   | Percent<br>Change<br>CY YTD Actual/<br>PY YTD Actual |
|----------------------------------------|-------------------|----------------------------|----------------------------|-------------------|----------------------------|----------------------------|----------------------------|-------------------|------------------------------------------------------|
|                                        | Percent           |                            | Percent                    |                   | Percent                    |                            | Percent                    |                   |                                                      |
|                                        | Orig Budget       | YTD Actual /<br>Adj Budget | YTD Actual /<br>Adj Budget | Orig Budget       | YTD Actual /<br>Adj Budget | YTD Actual /<br>Adj Budget | YTD Actual /<br>Adj Budget |                   |                                                      |
| <b>Revenue</b>                         |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| 41 Student Fees                        | 13,835,060        | 8,594,611                  | 62%                        | 13,679,170        | 9,333,034                  | 68%                        | 13,679,170                 | 9,333,034         | -8%                                                  |
| 42 Other Student Fees                  | 3,950,858         | 1,747,589                  | 44%                        | 3,678,121         | 2,038,219                  | 55%                        | 3,678,121                  | 2,038,219         | -14%                                                 |
| 43 Support From Local Government [1]   | 1,447,861         | 1,415,559                  | 98%                        | 1,343,347         | 1,204,297                  | 90%                        | 1,343,347                  | 1,204,297         | 18%                                                  |
| 44 State Support                       | 35,579,924        | 33,871,248                 | 32%                        | 35,999,152        | 10,809,630                 | 30%                        | 35,999,152                 | 10,809,630        | -1%                                                  |
| 45 Federal Support                     | 3,026,000         | 37,266                     | 1%                         | 26,000            | 60,062                     | 2%                         | 3,876,000                  | 60,062            |                                                      |
| 46 Gifts, Private Grants & Contracts   | 0                 | 0                          |                            | 0                 | 0                          |                            | 0                          | 0                 |                                                      |
| 47 Sales and Services Department       | 977,364           | 977,364                    | 54%                        | 827,665           | 370,173                    | 45%                        | 827,665                    | 370,173           | 42%                                                  |
| 49 Other Revenue [2]                   | 1,173,320         | 1,173,320                  | 28%                        | 476,544           | 352,804                    | 70%                        | 502,544                    | 352,804           | -7%                                                  |
| 4A Non-Revenue Receipts [3]            | 275,268           | 277,768                    |                            | 296,548           | (0)                        | 0%                         | 296,548                    | (0)               |                                                      |
| <b>Total : Revenue</b>                 | <b>60,265,655</b> | <b>58,559,479</b>          | <b>40%</b>                 | <b>56,326,547</b> | <b>23,318,380</b>          | <b>40%</b>                 | <b>60,202,547</b>          | <b>24,168,218</b> | <b>-4%</b>                                           |
| <b>Grand Total : Revenue</b>           | <b>60,265,655</b> | <b>58,559,479</b>          | <b>40%</b>                 | <b>56,326,547</b> | <b>23,318,380</b>          | <b>40%</b>                 | <b>60,202,547</b>          | <b>24,168,218</b> | <b>-4%</b>                                           |
| <b>Expense</b>                         |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| <b>Personnel</b>                       |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| 51 Salaries-Full Time & Perm Part Time | 26,959,740        | 27,242,563                 | 24%                        | 25,165,669        | 6,199,087                  | 25%                        | 25,167,669                 | 6,199,087         | 5%                                                   |
| 52 Other Personnel Exp P/T (Non-Perm)  | 3,756,892         | 3,765,292                  | 19%                        | 3,709,408         | 723,364                    | 20%                        | 3,709,408                  | 723,364           | -3%                                                  |
| 53 Personnel Benefits                  | 11,695,362        | 11,359,372                 | 24%                        | 11,991,426        | 2,487,460                  | 21%                        | 11,991,426                 | 2,487,460         | 11%                                                  |
| <b>Total : Personnel</b>               | <b>42,411,994</b> | <b>42,367,227</b>          | <b>23%</b>                 | <b>40,866,503</b> | <b>9,409,911</b>           | <b>23%</b>                 | <b>40,868,503</b>          | <b>9,409,911</b>  | <b>6%</b>                                            |
| <b>Current Expense</b>                 |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| 61 Services [4]                        | 15,293,290        | 15,521,850                 | 36%                        | 11,146,170        | 3,359,908                  | 22%                        | 15,087,180                 | 3,359,908         | 64%                                                  |
| 62 Materials and Supplies              | 4,289,406         | 4,329,067                  | 21%                        | 4,114,207         | 1,050,869                  | 25%                        | 4,250,164                  | 1,050,869         | -12%                                                 |
| 63 Other Current Charges [5]           | 5,508,677         | 3,781,855                  | 9%                         | 6,608,353         | 332,783                    | 5%                         | 6,527,463                  | 332,783           | 2%                                                   |
| <b>Total : Current Expense</b>         | <b>25,091,373</b> | <b>23,632,773</b>          | <b>29%</b>                 | <b>21,868,730</b> | <b>4,743,560</b>           | <b>18%</b>                 | <b>25,864,806</b>          | <b>4,743,560</b>  | <b>43%</b>                                           |
| <b>Capital</b>                         |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| 71 Capital Outlay                      | 2,013,000         | 2,020,797                  | 1%                         | 1,145,586         | 25,487                     | 2%                         | 1,171,375                  | 25,487            | 2%                                                   |
| <b>Total : Capital</b>                 | <b>2,013,000</b>  | <b>2,020,797</b>           | <b>1%</b>                  | <b>1,145,586</b>  | <b>25,487</b>              | <b>2%</b>                  | <b>1,171,375</b>           | <b>25,487</b>     | <b>2%</b>                                            |
| <b>Grand Total : Expense</b>           | <b>69,516,367</b> | <b>68,020,796</b>          | <b>25%</b>                 | <b>63,880,819</b> | <b>14,178,958</b>          | <b>21%</b>                 | <b>67,904,684</b>          | <b>14,178,958</b> | <b>18%</b>                                           |
| <b>Transfers</b>                       |                   |                            |                            |                   |                            |                            |                            |                   |                                                      |
| 69 Other Transfers                     | 0                 | 0                          |                            | 0                 | 0                          |                            | 0                          | 0                 |                                                      |
| <b>Total : Transfers</b>               | <b>0</b>          | <b>0</b>                   |                            | <b>0</b>          | <b>0</b>                   |                            | <b>0</b>                   | <b>0</b>          |                                                      |

[1] Dual enrollment revenue  
[2] Includes interest and dividends, fines and penalties, bad debt recoveries and miscellaneous revenue  
[3] Includes non-mandatory transfers in, proceeds from fixed asset sales, over and short, lost revenue recovery from CARES  
[4] Includes travel, postage, phone, printing, repairs, service agreements, utilities, advertising, temp svcs, consultants and professional fees, and contractors  
[5] Includes central store, scholarships, fee waivers, bad debt expense, unemployment comp and uninsured losses

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Upper Level Programs - Fund 12000

| AC<br>Type | Description                         | October 31, 2024 |                            |            |                            | October 31, 2023 |                            |            |                            | Percent Change<br>CY YTD Actual/<br>PY YTD Actual |      |
|------------|-------------------------------------|------------------|----------------------------|------------|----------------------------|------------------|----------------------------|------------|----------------------------|---------------------------------------------------|------|
|            |                                     | Orig Budget      |                            | YTD Actual |                            | Orig Budget      |                            | YTD Actual |                            |                                                   |      |
|            |                                     | Adj Budget       | YTD Actual /<br>Adj Budget | Adj Budget | YTD Actual /<br>Adj Budget | Adj Budget       | YTD Actual /<br>Adj Budget | Adj Budget | YTD Actual /<br>Adj Budget |                                                   |      |
|            | <b>Revenue</b>                      |                  |                            |            |                            |                  |                            |            |                            |                                                   |      |
| 41         | Student Fees                        | 1,439,766        | 801,897                    | 56%        | 1,302,969                  | 892,491          | 68%                        |            |                            |                                                   | -10% |
| 42         | Other Student Fees                  | 140,149          | 67,633                     | 48%        | 123,689                    | 69,664           | 56%                        |            |                            |                                                   | -3%  |
| 44         | State Support                       | 178,164          | 0                          | 0%         | 178,164                    | 0                | 0%                         |            |                            |                                                   | 0%   |
| 49         | Other Revenue [1]                   | 159,183          | 45,119                     | 28%        | 68,438                     | 58,564           | 86%                        |            |                            |                                                   | -10% |
|            | <b>Total : Revenue</b>              | <b>1,917,262</b> | <b>914,649</b>             | <b>48%</b> | <b>1,673,260</b>           | <b>1,020,718</b> | <b>61%</b>                 |            |                            |                                                   |      |
|            | <b>Grand Total : Revenue</b>        | <b>1,917,262</b> | <b>914,649</b>             | <b>48%</b> | <b>1,673,260</b>           | <b>1,020,718</b> | <b>61%</b>                 |            |                            |                                                   |      |
|            | <b>Expense</b>                      |                  |                            |            |                            |                  |                            |            |                            |                                                   |      |
|            | <b>Personnel</b>                    |                  |                            |            |                            |                  |                            |            |                            |                                                   |      |
| 51         | Salaries-Full Time & Perm Part Time | 813,108          | 200,508                    | 24%        | 800,253                    | 186,546          | 23%                        |            |                            |                                                   | 7%   |
| 52         | Other Personnel Exp P/T (Non-Perm)  | 363,600          | 122,711                    | 34%        | 400,451                    | 124,728          | 31%                        |            |                            |                                                   | -2%  |
| 53         | Personnel Benefits                  | 394,129          | 65,116                     | 16%        | 259,408                    | 63,146           | 24%                        |            |                            |                                                   | 3%   |
|            | <b>Total : Personnel</b>            | <b>1,570,837</b> | <b>388,334</b>             | <b>25%</b> | <b>1,460,112</b>           | <b>374,419</b>   | <b>26%</b>                 |            |                            |                                                   | 4%   |
|            | <b>Current Expense</b>              |                  |                            |            |                            |                  |                            |            |                            |                                                   |      |
| 61         | Services [2]                        | 34,675           | 922                        | 3%         | 35,755                     | 6,092            | 18%                        |            |                            |                                                   | -85% |
| 62         | Materials and Supplies              | 86,143           | 4,139                      | 5%         | 83,777                     | 3,802            | 4%                         |            |                            |                                                   | 9%   |
| 63         | Other Current Charges [3]           | 93,616           | 37,995                     | 41%        | 93,616                     | 5,246            | 6%                         |            |                            |                                                   | 6%   |
|            | <b>Total : Current Expense</b>      | <b>214,434</b>   | <b>43,054</b>              | <b>20%</b> | <b>213,148</b>             | <b>15,141</b>    | <b>7%</b>                  |            |                            |                                                   |      |
|            | <b>Capital</b>                      |                  |                            |            |                            |                  |                            |            |                            |                                                   |      |
| 71         | Capital Outlay                      | 0                | 0                          |            | 0                          | 0                |                            |            |                            |                                                   |      |
|            | <b>Total : Capital</b>              | <b>0</b>         | <b>0</b>                   |            | <b>0</b>                   | <b>0</b>         |                            |            |                            |                                                   |      |
|            | <b>Grand Total : Expense</b>        | <b>1,785,271</b> | <b>431,390</b>             | <b>24%</b> | <b>1,673,260</b>           | <b>389,560</b>   | <b>23%</b>                 |            |                            |                                                   | 11%  |

[1] Includes interest and dividends, fines and penalties, bad debt recoveries and miscellaneous revenue  
[2] Includes travel, postage, phone, printing, repairs, service agreements, utilities, advertising, temp svcs, consultants and professional fees, and contractors  
[3] Includes central store, scholarships, fee waivers and bad debt expense

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

**RESOLUTION NUMBER: Thirteen (13)  
AMENDMENT NUMBER: Thirteen (13)**

**FISCAL YEAR: 2024-25  
October 2024**

FUND NAME: CURRENT UNRESTRICTED

FUND NUMBER: 11000

| CATEGORY                  | PRESENT       |              |           | REVISED       |
|---------------------------|---------------|--------------|-----------|---------------|
|                           | BUDGET        | INCREASE     | DECREASE  | BUDGET        |
| Beginning Fund Balance    | \$ 21,722,247 | \$           | \$        | \$ 21,722,247 |
| REVENUE                   | 58,559,479    |              |           | 58,559,479    |
| TOTAL TO BE ACCOUNTED FOR | \$ 80,281,726 | \$ 0         | \$ 0      | \$ 80,281,726 |
| SALARIES                  | \$ 42,365,227 | \$ 2,000 <a> |           | 42,367,227    |
| CURRENT EXPENSE           | 23,154,769    | 4,809 <b>    |           | 23,159,578    |
| CAPITAL OUTLAY            | 1,027,606     |              | 6,809 <c> | 1,020,797     |
| ENDING FUND BALANCE       | 13,734,124    |              |           | 13,734,124    |
| TOTAL ACCOUNTED FOR       | \$ 80,281,726 | \$ 6,809     | \$ 6,809  | \$ 80,281,726 |

JUSTIFICATION:

<a> The \$2,000 increase in Salaries Expense is due to:

|                                                                           |                 |
|---------------------------------------------------------------------------|-----------------|
| Increase in budget for employee supplement - Art Design Department        | 1,000           |
| Increase in budget for employee supplement - Academic Department - Venice | 1,000           |
|                                                                           | <u>\$ 2,000</u> |

<b> The \$4,809 increase in Current Expense is due to:

|                                                                           |                 |
|---------------------------------------------------------------------------|-----------------|
| Increase in budget for Ed-Ready Software                                  | 6,809           |
| Decrease in budget for employee supplement - Art Design Department        | (1,000)         |
| Decrease in budget for employee supplement - Academic Department - Venice | (1,000)         |
|                                                                           | <u>\$ 4,809</u> |

<c> The \$6,809 decrease in Capital Outlay Expense is due to:

|                                          |                   |
|------------------------------------------|-------------------|
| Decrease in budget for Ed-Ready Software | (6,809)           |
|                                          | <u>\$ (6,809)</u> |

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

RESOLUTION NUMBER: Fourteen (14)  
AMENDMENT NUMBER: Fourteen (14)

FISCAL YEAR: 2024-25  
October 2024

FUND NAME: GENERAL RESTRICTED

FUND NUMBER: TWO

| CATEGORY                  | PRESENT BUDGET | INCREASE      | DECREASE | REVISED BUDGET |
|---------------------------|----------------|---------------|----------|----------------|
| Beginning Fund Balance    | \$ 2,071,953   | \$            | \$       | \$ 2,071,953   |
| REVENUE                   | 9,489,347      | 330,376 <a>   |          | 9,819,723      |
| TOTAL TO BE ACCOUNTED FOR | \$ 11,561,300  | \$ 330,376    | \$ 0     | \$ 11,891,676  |
| SALARIES                  | \$ 6,154,857   | \$ 21,699 <b> |          | 6,176,556      |
| CURRENT EXPENSE           | 3,405,801      | 165,682 <c>   |          | 3,571,483      |
| CAPITAL OUTLAY            | 134,586        | 2,469 <d>     |          | 137,055        |
| ENDING FUND BALANCE       | 1,866,056      | 143,302 <e>   |          | 2,009,358      |
| TOTAL ACCOUNTED FOR       | \$ 11,561,300  | \$ 333,152    | \$ 0     | \$ 11,894,452  |

JUSTIFICATION:

<a> The \$330,376 increase in Revenue is due to:  
Increase in budget for increased revenue for B2B grant  
Increase in budget for increased revenue for Trio grant

35,000  
295,376  
\$ 330,376

<b> The \$21,699 increase in Salaries Expense is due to:  
Increase in budget for salaries for B2B grant  
Increase in budget for benefits for B2B grant

21,623  
76  
\$ 21,699

<c> The \$165,682 increase in Current Expense is due to:  
Increase in budget for current expenses for B2B grant  
Increase in budget for food service subsidy from SABR  
Decrease in budget for current expenses for B2B grant  
Increase in budget for SABR upgrades, trips, and hammocks  
Decrease in budget for baseball purchases

10,377  
150,000  
(76)  
7,850  
(2,469)  
\$ 165,682

<d> The \$2,469 increase to Capital Outlay expenses is due to:  
Increase in budget for baseball purchases

2,469  
\$ 2,469

<e> The \$143,302 increase to fund balance is due to:  
Increase in budget for B2B grant, Trio grant, SABR and athletics

143,302  
\$ 143,302

**BUDGET AMENDMENT REQUEST  
STATE COLLEGE OF FLORIDA, MANATEE - SARASOTA**

RESOLUTION NUMBER: Fifteen (15)  
AMENDMENT NUMBER: Fifteen (15)

FISCAL YEAR: 2024-25  
October 2024

FUND NAME: UNEXPENDED PLANT FUND

FUND NUMBER: SEVEN

|                           | PRESENT       |              |              | REVISED       |
|---------------------------|---------------|--------------|--------------|---------------|
| CATEGORY                  | BUDGET        | INCREASE     | DECREASE     | BUDGET        |
| Beginning Fund Balance    | \$ 24,425,514 | \$           | \$           | \$ 24,425,514 |
| REVENUE                   | 53,166,883    |              |              | 53,166,883    |
| TOTAL TO BE ACCOUNTED FOR | \$ 77,592,397 | \$ 0         | 0            | \$ 77,592,397 |
| <br>                      |               |              |              |               |
| SALARIES                  | \$ 309,775    | \$           |              | 309,775       |
| CURRENT EXPENSE           | 119,585       | 3,000        | <a>          | 122,585       |
| CAPITAL OUTLAY            | 26,500,278    | 997,000      | <b>          | 27,497,278    |
| ENDING FUND BALANCE       | 50,662,760    | <c>          | 1,000,000    | 49,662,760    |
| TOTAL ACCOUNTED FOR       | \$ 77,592,397 | \$ 1,000,000 | \$ 1,000,000 | \$ 77,592,397 |

JUSTIFICATION:

<a> The \$3,000 increase in Current Expense is due to:  
Increase in budget for tech refresh supplies

|                 |
|-----------------|
| 3,000           |
| \$ <u>3,000</u> |

<b> The \$997,000 increase in Capital Outlay is due to:  
Decrease in budget for tech refresh supplies  
Increase in budget for Hurricane Milton Repairs

|                  |
|------------------|
| (3,000)          |
| <u>1,000,000</u> |
| <u>997,000</u>   |

<c> The \$1,000,000 decrease in Ending Fund Balance is due to:  
Decrease in fund balance for Hurricane Milton Repairs

|                    |
|--------------------|
| (1,000,000)        |
| <u>(1,000,000)</u> |

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Collegiate School - Bradenton Campus

| AC Type Description                    | October 31, 2024 |                  |                  |                            | October 31, 2023 |                  |                  |            | Percent Change<br>CY YTD Actual/<br>PY YTD Actual |                            |
|----------------------------------------|------------------|------------------|------------------|----------------------------|------------------|------------------|------------------|------------|---------------------------------------------------|----------------------------|
|                                        | Orig Budget      | Adj Budget       | YTD Actual       | YTD Actual /<br>Adj Budget | Percent          | Orig Budget      | Adj Budget       | YTD Actual |                                                   | YTD Actual /<br>Adj Budget |
| <b>Revenue</b>                         |                  |                  |                  |                            |                  |                  |                  |            |                                                   |                            |
| 43 Support From Local Government [1]   | 4,492,106        | 4,492,106        | 1,677,671        | 37%                        | 3,954,102        | 4,122,643        | 1,410,907        | 34%        | 19%                                               |                            |
| 44 State Support [2]                   | 0                | 0                | 50,405           |                            | 40               | 40               | 51,403           |            | -2%                                               |                            |
| 45 Federal Support [3]                 | 27,268           | 27,268           | 162,833          |                            | 27,268           | 27,268           | (43,317)         | -159%      |                                                   |                            |
| 49 Other Revenue [4]                   | 0                | 0                | 32,139           |                            | 79,430           | 79,430           | 28,662           | 36%        | 12%                                               |                            |
| <b>Total : Revenue</b>                 | <b>4,519,374</b> | <b>4,519,374</b> | <b>1,923,047</b> | <b>43%</b>                 | <b>4,060,840</b> | <b>4,229,381</b> | <b>1,447,654</b> | <b>34%</b> | <b>33%</b>                                        |                            |
| <b>Grand Total : Revenue</b>           | <b>4,519,374</b> | <b>4,519,374</b> | <b>1,923,047</b> | <b>43%</b>                 | <b>4,060,840</b> | <b>4,229,381</b> | <b>1,447,654</b> | <b>34%</b> | <b>33%</b>                                        |                            |
| <b>Expense</b>                         |                  |                  |                  |                            |                  |                  |                  |            |                                                   |                            |
| <b>Personnel</b>                       |                  |                  |                  |                            |                  |                  |                  |            |                                                   |                            |
| 51 Salaries-Full Time & Perm Part Time | 2,497,195        | 2,497,695        | 569,179          | 22%                        | 1,834,689        | 1,834,689        | 528,564          | 29%        | 6%                                                |                            |
| 52 Other Personnel Exp P/T (Non-Perm)  | 59,520           | 59,520           | 2,333            | 4%                         | 59,520           | 59,520           | 5,578            | 9%         | -58%                                              |                            |
| 53 Personnel Benefits                  | 732,988          | 733,026          | 210,107          | 29%                        | 732,988          | 732,988          | 206,991          | 28%        | 2%                                                |                            |
| <b>Total : Personnel</b>               | <b>3,289,703</b> | <b>3,290,241</b> | <b>771,620</b>   | <b>23%</b>                 | <b>2,627,197</b> | <b>2,627,197</b> | <b>741,133</b>   | <b>28%</b> | <b>4%</b>                                         |                            |
| <b>Current Expense</b>                 |                  |                  |                  |                            |                  |                  |                  |            |                                                   |                            |
| 61 Services [5]                        | 1,235,145        | 1,168,402        | 158,638          | 14%                        | 1,065,835        | 1,069,936        | 130,332          | 12%        | 22%                                               |                            |
| 62 Materials and Supplies              | 295,214          | 371,897          | 173,546          | 47%                        | 269,154          | 269,154          | 102,868          | 38%        | 69%                                               |                            |
| 63 Other Current Charges               | 0                | 0                | 0                |                            | 0                | 0                | 0                |            |                                                   |                            |
| <b>Total : Current Expense</b>         | <b>1,530,360</b> | <b>1,540,299</b> | <b>332,184</b>   | <b>22%</b>                 | <b>1,334,989</b> | <b>1,339,090</b> | <b>233,200</b>   | <b>17%</b> | <b>42%</b>                                        |                            |
| <b>Capital</b>                         |                  |                  |                  |                            |                  |                  |                  |            |                                                   |                            |
| 71 Capital Outlay                      | 296,899          | 333,992          | 168,257          | 50%                        | 538,038          | 681,730          | 291,396          | 43%        |                                                   |                            |
| <b>Total : Capital</b>                 | <b>296,899</b>   | <b>333,992</b>   | <b>168,257</b>   | <b>50%</b>                 | <b>538,038</b>   | <b>681,730</b>   | <b>291,396</b>   | <b>43%</b> |                                                   |                            |
| <b>Grand Total : Expense</b>           | <b>5,116,962</b> | <b>5,164,533</b> | <b>1,272,061</b> | <b>25%</b>                 | <b>4,500,223</b> | <b>4,648,017</b> | <b>1,265,729</b> | <b>27%</b> | <b>1%</b>                                         |                            |

[1] Includes revenue from Manatee County school district  
 [2] Includes capital funding from Manatee County school district  
 [3] Includes grant revenue  
 [4] Includes interest and dividend, teacher supply funds and Best & Brightest Scholarships awarded by Manatee County school board.  
 [5] Includes travel, postage, printing, lease, insurance, contracted services (including DE), and professional fees

State College of Florida  
Two Year Revenue and Expense Comparison Report  
FY 2024-25 vs. FY 2023-24  
Collegiate School - Venice Campus

| AC<br>Type Description                 | October 31, 2024 |                  |                |                            |                            | October 31, 2023 |                |            |                            |                            |  |  |  |
|----------------------------------------|------------------|------------------|----------------|----------------------------|----------------------------|------------------|----------------|------------|----------------------------|----------------------------|--|--|--|
|                                        | Orig Budget      | Adj Budget       | YTD Actual     | Percent                    |                            | Orig Budget      | Adj Budget     | YTD Actual | Percent                    |                            |  |  |  |
|                                        |                  |                  |                | YTD Actual /<br>Adj Budget | YTD Actual /<br>YTD Actual |                  |                |            | YTD Actual /<br>Adj Budget | YTD Actual /<br>YTD Actual |  |  |  |
| <b>Revenue</b>                         |                  |                  |                |                            |                            |                  |                |            |                            |                            |  |  |  |
| 43 Support From Local Government [1]   | 2,613,647        | 2,613,647        | 787,890        | 30%                        | 2,364,033                  | 2,364,033        | 368,709        | 16%        | 114%                       |                            |  |  |  |
| 44 State Support [2]                   | 0                | 0                | 79,708         |                            | 0                          | 0                | 0              |            |                            |                            |  |  |  |
| 45 Federal Support [3]                 | 12,680           | 12,680           | 1,153          | 9%                         | 30,000                     | 30,000           | (66,288)       | -221%      | -102%                      |                            |  |  |  |
| 49 Other Revenue [4]                   | 3,000            | 3,000            | 8,267          | 276%                       | 2,000                      | 2,000            | 7,871          | 394%       |                            |                            |  |  |  |
| 4A Non-Revenue Receipts                | 0                | 0                | 0              |                            | 0                          | 0                | 0              |            |                            |                            |  |  |  |
| <b>Total : Revenue</b>                 | <b>2,629,327</b> | <b>2,629,327</b> | <b>877,018</b> | <b>33%</b>                 | <b>2,396,033</b>           | <b>2,396,033</b> | <b>310,292</b> | <b>13%</b> | <b>183%</b>                |                            |  |  |  |
| <b>Grand Total : Revenue</b>           | <b>2,629,327</b> | <b>2,629,327</b> | <b>877,018</b> | <b>33%</b>                 | <b>2,396,033</b>           | <b>2,396,033</b> | <b>310,292</b> | <b>13%</b> | <b>183%</b>                |                            |  |  |  |
| <b>Expense</b>                         |                  |                  |                |                            |                            |                  |                |            |                            |                            |  |  |  |
| <b>Personnel</b>                       |                  |                  |                |                            |                            |                  |                |            |                            |                            |  |  |  |
| 51 Salaries-Full Time & Perm Part Time | 1,124,871        | 1,124,871        | 252,417        | 22%                        | 1,044,146                  | 1,044,146        | 231,511        | 22%        | 9%                         |                            |  |  |  |
| 52 Other Personnel Exp P/T (Non-Perm)  | 25,000           | 25,000           | 865            | 3%                         | 17,000                     | 17,000           | 6,079          | 36%        | -86%                       |                            |  |  |  |
| 53 Personnel Benefits                  | 367,987          | 367,987          | 94,843         | 26%                        | 359,599                    | 359,599          | 88,465         | 25%        | 7%                         |                            |  |  |  |
| <b>Total : Personnel</b>               | <b>1,517,858</b> | <b>1,517,858</b> | <b>348,125</b> | <b>23%</b>                 | <b>1,420,745</b>           | <b>1,420,745</b> | <b>326,054</b> | <b>23%</b> | <b>7%</b>                  |                            |  |  |  |
| <b>Current Expense</b>                 |                  |                  |                |                            |                            |                  |                |            |                            |                            |  |  |  |
| 61 Services [5]                        | 800,958          | 816,958          | 71,260         | 9%                         | 547,840                    | 554,140          | 25,326         | 5%         | 181%                       |                            |  |  |  |
| 62 Materials and Supplies              | 230,356          | 216,757          | 46,366         | 21%                        | 184,687                    | 189,839          | 42,659         | 22%        | 9%                         |                            |  |  |  |
| <b>Total : Current Expense</b>         | <b>1,031,314</b> | <b>1,033,714</b> | <b>117,626</b> | <b>11%</b>                 | <b>732,527</b>             | <b>743,980</b>   | <b>67,985</b>  | <b>9%</b>  | <b>73%</b>                 |                            |  |  |  |
| <b>Capital</b>                         |                  |                  |                |                            |                            |                  |                |            |                            |                            |  |  |  |
| Capital Outlay                         | 5,000            | 27,383           | 2,529          | 9%                         | 5,000                      | 33,376           | 2,220          | 7%         | 14%                        |                            |  |  |  |
| <b>Total : Capital</b>                 | <b>5,000</b>     | <b>27,383</b>    | <b>2,529</b>   | <b>9%</b>                  | <b>5,000</b>               | <b>33,376</b>    | <b>2,220</b>   | <b>7%</b>  | <b>14%</b>                 |                            |  |  |  |
| <b>Grand Total : Expense</b>           | <b>2,554,172</b> | <b>2,578,955</b> | <b>468,280</b> | <b>18%</b>                 | <b>2,158,272</b>           | <b>2,198,101</b> | <b>396,260</b> | <b>18%</b> | <b>18%</b>                 |                            |  |  |  |

[1] Includes revenue from Sarasota County school district  
[2] Includes capital funding from Sarasota County school district  
[3] Includes grant revenue  
[4] Includes interest and dividends revenue  
[5] Includes travel, postage, printing, lease, insurance, contracted services (including DE), and professional fees



## ACCEPTANCE OF GIFTS AND GRANTS

It is respectfully requested the District Board of Trustees of State College of Florida, Manatee-Sarasota accept and approve the following gifts and grants.

### October 2024

| <u>DONOR/GRANTOR</u>                          | <u>AMOUNT</u>    | <u>DESCRIPTION</u> |
|-----------------------------------------------|------------------|--------------------|
| <b><u>Gifts:</u></b>                          |                  |                    |
| No gifts received                             |                  |                    |
| <b><u>Grants:</u></b>                         |                  |                    |
| United States Department of Education         |                  |                    |
| October YTD Revenue                           | 686,453          |                    |
| September YTD Revenue                         | 686,453          |                    |
| Change for Month of October                   | -                | Pell Grant 2023-24 |
| October YTD Revenue                           | 6,532,340        |                    |
| September YTD Revenue                         | -                |                    |
| Change for Month of October                   | 6,532,340        | Pell Grant 2024-25 |
| <b>Total Received - Gifts</b>                 | -                |                    |
| <b>Total Received (Returned) - Pell Grant</b> | <b>6,532,340</b> |                    |

**PROPERTY DISPOSAL**  
(Complete and route to Vice President, Finance & Administrative Services)



Proposed by Xavier Montgomery  
Name  
Manager, Business Operations  
Title

Date 11/14/24

| Description              | Asset #  | Purchase Price | Purchase Date | Reason for disposal | Method of disposal |
|--------------------------|----------|----------------|---------------|---------------------|--------------------|
| OptiPlex 5060 Mini       | 00035136 | \$1,139.25     | 02/03/2020    | Obsolete            | Escrap             |
| Latitude 5400 XCTO       | 00035268 | \$1,200.00     | 06/17/2020    | Obsolete            | Escrap             |
| OptiPlex 3050 Micro XCTO | 033853   | \$692.48       | 07/24/2018    | Obsolete            | Escrap             |
| MacBook Pro              | 00035154 | \$1,579.00     | 03/09/2020    | Obsolete            | Escrap             |
| Latitude 5510 BTX        | 00035351 | \$1,350.00     | 08/21/2020    | Obsolete            | Escrap             |
| Latitude 5400 XCTO       | 00035295 | \$1,200.00     | 06/17/2020    | Obsolete            | Escrap             |
| Latitude 5510 XCTO       | 00035576 | \$1,395.00     | 01/07/2021    | Obsolete            | Escrap             |
| Latitude 5400 XCTO       | 00035278 | \$1,200.00     | 06/17/2020    | Obsolete            | Escrap             |
| Latitude 5400 XCTO       | 00035287 | \$1,200.00     | 06/17/2020    | Obsolete            | Escrap             |
| OptiPlex 5060 Mini XCTO  | 034379   | \$900.00       | 05/02/2019    | Obsolete            | Escrap             |
| OptiPlex 5060 Mini XCTO  | 034394   | \$900.00       | 05/02/2019    | Obsolete            | Escrap             |
| Latitude 5400 XCTO       | 00035263 | \$1200.00      | 06/17/2020    | Obsolete            | Escrap             |

Xavier Montgomery 11/14/2024  
Proposer Date

Roseanne  
Business Services Administrator Date

Julia Takvas  
Signature of Vice President, Finance & Administrative Services Date

**STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
GRANT PROPOSAL**

|                                                       |                                                                                                               |                                         |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| NO:<br><b>24-13</b>                                   | TITLE:<br><b>Strengthening Community Colleges Round<br/>5: Driving Success by Expanding<br/>Opportunities</b> | FUNDS REQUESTED:<br><b>\$ 5,700,000</b> |
| SPONSORING AGENCY:<br><b>U.S. Department of Labor</b> |                                                                                                               | SCF Cash Match:<br><b>\$ 0</b>          |
| PROPOSERS:<br><b>Dr. Todd Fritch</b>                  |                                                                                                               | SCF In-Kind Match:<br><b>\$ 0</b>       |

*College departments and participating personnel:*

Dr. Todd Fritch, Executive VP, and Provost; Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs; Dr. Ryan Hale, VP Institutional Effectiveness; Dr. Bryce Pride, Associate Vice President of Institutional Research


**GRANT SUMMARY:** The purpose of the U.S. Department of Labor's fifth round of the Strengthening Community Colleges (SCC5) Training Grants Program is to build community colleges' capacity to meet workforce needs and equitably support students in obtaining good jobs in in-demand industries.

The *Driving Success by Expanding Opportunities* project will be a consortium effort between State College of Florida (SCF), the College of Central Florida (CF), and Florida SouthWestern College (FSW), with SCF serving as the lead institution. The grant proposal requests \$5.7 million to be administered over the four-year period of performance to address the shortage of skilled commercial drivers in Florida by creating a career pathway in transportation and logistics. The career pathway will offer multiple entry and exit points for participants to earn stackable credentials, beginning with a Commercial Driver's License (CDL) and progressing to College Credit Certificates (CCC) and Associate of Science (A.S.) degrees that align with local workforce needs and provide economic mobility for interested community members including populations that are underrepresented in the transportation and logistics sector and overrepresented in low-wage jobs particularly low-income, female, African American, and Hispanic students. When combined, these groups represent an untapped portion of the population that could be trained to fill in-demand transportation and logistics related occupations, and represent low-income, underserved groups that will benefit from the family-sustaining wages to improve their standard of living.

The project will foster partnerships with industry employers, workforce development agencies and community-based organizations to create a flexible and accessible training model that includes apprenticeships, hands-on training, and wraparound supports to ensure participants have what they need to obtain their credentials. SCF, CF and FSW will track the progress of an estimated 700 total participants in the career pathway program across all three colleges over the grant period of performance (48 months).

When the grant period of performance concludes, each participating institution will have established a sustainable transportation and logistics career pathway that 1) addresses regional workforce needs and 2) increases enrollment and completion rates among the targeted population while providing employers with a well-trained workforce. The project will ultimately serve as a model to build future career pathways in other in-demand sectors.

**Signature Page**  
**Proposal # 24-13**

|                                                                                                                                                   |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| <br><small>Todd Fritch (Oct 15, 2024 11:04 EDT)</small>          | 10/15       |
| <b>Dr. Todd Fritch - Area Administrator</b>                                                                                                       | <b>Date</b> |
| <br><small>Erin Buckley</small>                                  | 10/15       |
| <b>Erin Buckley - Sponsored Projects</b>                                                                                                          | <b>Date</b> |
| <br><small>Paul Berkle</small>                                   | 10/15       |
| <b>Paul Berkle - Director Human Resources</b>                                                                                                     | <b>Date</b> |
| <br><small>Dr. Patricia Rand</small>                             | 10/15       |
| <b>Dr. Patricia Rand - Associate Provost for Academic and Faculty Affairs</b>                                                                     | <b>Date</b> |
| <br><small>Brittany K. Nielsen (Oct 15, 2024 2:26 EDT)</small>   | 10/15       |
| <b>Dr. Brittany Nielsen - VP Student Services &amp; Enrollment Management</b>                                                                     | <b>Date</b> |
| <br><small>Christopher Wellman</small>                         | 10/15       |
| <b>Christopher Wellman – Interim VP Finance and Administrative Services</b>                                                                       | <b>Date</b> |
| <br><small>Julie Jakway (Oct 15, 2024 12:59 EDT)</small>       | 10/15       |
| <b>Julie Jakway – Senior VP</b>                                                                                                                   | <b>Date</b> |
| <br><small>Todd Fritch (Oct 15, 2024 11:14 EDT)</small>        | 10/15       |
| <b>Dr. Todd Fritch - Executive VP &amp; Provost</b>                                                                                               | <b>Date</b> |
| <br><small>Ryan Hale (Oct 15, 2024 10:07 EDT)</small>          | 10/15       |
| <b>Dr. Ryan Hale - VP for Institutional Effectiveness</b>                                                                                         | <b>Date</b> |
| <br><small>Tommy Gregory, Jr. (Oct 15, 2024 10:26 EDT)</small> | 10/24       |
| <b>Tommy Gregory - President</b>                                                                                                                  | <b>Date</b> |
| <b>Submitted to Board of Trustees</b>                                                                                                             | <b>Date</b> |

By signing below, I acknowledge that I have read and approve Grant Proposal 24-13 as listed above.

**STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
GRANT PROPOSAL**

|                                                                                                                             |                                                                          |                                                |
|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|------------------------------------------------|
| <b>NO: 24-14</b>                                                                                                            | <b>TITLE:</b><br><b>Linking Industry to Nursing Education<br/>(LINE)</b> | <b>FUNDS REQUESTED:</b><br><b>\$ 435,000</b>   |
| <b>SPONSORING AGENCY:</b><br><b>Florida Department of Education</b>                                                         |                                                                          | Cash Match from Industry:<br><b>\$ 435,000</b> |
| <b>PROPOSERS: Dr. Tammy Sawmelle, Dean of Nursing &amp;<br/>Ms. Cassandra Holmes, SCF Foundation Executive<br/>Director</b> |                                                                          | SCF In-Kind Match:<br><b>\$ 0</b>              |

***College departments and participating personnel:*** Ms. Cassandra Holmes, SCF Foundation Executive Director; Dr. Todd Fritch, Executive VP & Provost; Dr. Patricia Rand, Associate Provost for Academic and Faculty Affairs; Dr. Tammy Sawmelle, Dean of Nursing.

**GRANT SUMMARY:**

Senate Bill 2524 (2022) established a new competitive grant opportunity for districts, Florida College System (FCS) institutions, and independent nonprofit colleges and universities in Florida. Section (s.) 1009.8962, Florida Statutes (F.S.) was created to incentivize collaboration between nursing education programs and health care partners to combat the growing nursing shortage in the state.

This program, titled the Linking Industry to Nursing Education (LINE) Fund, provides matching funds, on a dollar-for-dollar basis, to participating agencies that partner with health care providers.

State College of Florida, Manatee-Sarasota (SCF), in partnership with the State College of Florida Foundation, has received pledges from seven industry partners, totaling \$435,000. These generous industry partners include HCA Florida Blake Hospital, Sarasota Memorial Health Care System, Manatee Memorial Hospital, the Manatee Memorial Foundation, Lakewood Ranch Medical Center, Empath Health, and Cooper Family Medicine. These matching funds allow SCF to apply for an equal amount from the Florida Department of Education's LINE Fund. These contributions, along with the match from the Florida Department of Education, bring the total grant funds that will benefit SCF's nursing program to \$870,000.

Funds will be used to award scholarships to students who meet the residency for tuition purposes requirements and to recruit additional faculty to support instruction and the implementation of the Dual Language program and simulation centers that were funded with LINE funds in the 2023-2024 academic year.

The grant runs through June 30, 2025.

**Signature Page**  
**Proposal No: 24-14**

By Signing below, I acknowledge that I have read and approve Grant Proposal No: 24-14.



Dr. Tammy Sawmelle, Area Administrator

11/07/24

Date



Erin Buckley, Director Sponsored Projects

11/07/24

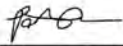
Date



Paul Berkle, Director Human Resources

11/07/24

Date



Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs

11/07/24

Date

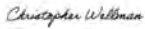


Brittany K. Nielsen (Nov 8, 2024 11:05 EST)

Dr. Brittany Nielsen, VP Student Services & Enrollment Management

11/08/24

Date



Christopher Wellman, Interim VP Finance & Administrative Services

11/07/24

Date



Julie Jakway (Nov 7, 2024 15:20 EST)

Julie Jakway, Senior VP

11/07/24

Date



Todd Fritch (Nov 7, 2024 14:46 EST)

Dr. Todd Fritch, Executive VP & Provost

11/07/24

Date



Ryan Hale (Nov 7, 2024 11:55 EST)

Dr. Ryan Hale, VP Institutional Effectiveness

11/07/24

Date



Tommy Gregory, Sr. (Nov 8, 2024 11:23 EST)

Tommy Gregory, President

11/08/24

Date

Submitted to Board of Trustees

Date

**STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
GRANT PROPOSAL**

|                                                                                                           |                                                                                                                       |                                              |
|-----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <b>NO: 24-15</b>                                                                                          | <b>TITLE:</b><br><b>FY25 Perkins V CTE Equipment Upgrade<br/>and Modernization Grant –<br/>Engineering Technology</b> | <b>FUNDS REQUESTED:</b><br><b>\$ 246,159</b> |
| <b>SPONSORING AGENCY:</b><br><b>Florida Department of Education</b>                                       |                                                                                                                       | Cash Match:<br><b>\$</b>                     |
| <b>PROPOSERS:</b><br><b>Mr. Sam Aldrich, Engineering Technology and<br/>Manufacturing Program Manager</b> |                                                                                                                       | SCF In-Kind Match:<br><b>\$ 0</b>            |

*College departments and participating personnel:* Dr. Ryan Hale, VP Institutional Effectiveness; Mr. Gary Baker, Assistant Dean Business and Technology, Mr. Jason Reed, Department Chair of Technology; Mr. Sam Aldrich, Program Manager of Engineering Technology

**GRANT SUMMARY:**

The Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act offers funds to agencies that have a current need for equipment upgrades and modernization for an established postsecondary Perkins-V CTE Program. These funds will assist agencies in meeting industry standards, which will better equip students for future job opportunities in high-demand fields. In addition to high-skill, high-wage, in-demand jobs, the EUM grant also seeks:

- To support an efficient and effective use of funds.
- To provide solutions for a variety of educational and economic priority needs in Florida.
- To meet needs not readily addressed by other funding sources.

A primary identified need at State College of Florida, Manatee-Sarasota (SCF) is the aging or out-of-date equipment that needs to be updated to keep students current with industry standards. Another identified need is that SCF CTE students need more opportunities for and access to high-quality experiential learning.

The equipment currently used in the Engineering Technology and Manufacturing (ETM) program doesn't provide integrated and authentic activities for students to apply theory, and due to the number of devices available, doesn't provide frequent opportunities for students to practice skills and achieve the mastery necessary for credentialing. SCF submitted a proposal and has been invited to apply for a \$246,159 grant to purchase equipment for the program. The equipment included in the proposal will provide hands-on skills practice in Robotics, PLC, and manufacturing for courses in the ETM and Construction Management Technology (CMT) programs. Providing enough equipment to outfit both the Venice and Bradenton campuses will reduce the time and expense of traveling to attend classes at our northernmost campus. The grant runs through June 30, 2025.

**Signature Page**  
**Proposal # 24-15**

By Signing below, I acknowledge that I have read and approve Grant Proposal No: 24-15.

Gary Baker

Gary Baker, Area Administrator

11/07/24

Date

Erin Buckley

Erin Buckley, Director Sponsored Projects

11/07/24

Date

Paul Berkle

Paul Berkle, Director Human Resources

11/07/24

Date

Patricia Rand

Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs

11/08/24

Date

Brittany K. Nielsen

Brittany K. Nielsen (Nov 8, 2024 11:08 EST)

Dr. Brittany Nielsen, VP Student Services & Enrollment Management

11/08/24

Date

Christopher Wellman

Christopher Wellman, Interim VP Finance & Administrative Services

11/07/24

Date

Julie Jakway

Julie Jakway (Nov 7, 2024 15:17 EST)

Julie Jakway, Senior VP

11/07/24

Date

Todd Fritch

Todd Fritch (Nov 8, 2024 07:52 EST)

Dr. Todd Fritch, Executive VP & Provost

11/08/24

Date

Ryan Hale

Ryan Hale (Nov 7, 2024 14:55 EST)

Dr. Ryan Hale, VP Institutional Effectiveness

11/07/24

Date

Tommy Gregory, Jr.

Tommy Gregory, Jr. (Nov 8, 2024 10:11 EST)

Tommy Gregory, President

11/08/24

Date

Submitted to Board of Trustees

Date



**STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
GRANT PROPOSAL**

|                                                                                          |                                                                                                                        |                                              |
|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| <b>NO: 24-16</b>                                                                         | <b>TITLE:</b><br><b>FY25 Perkins V CTE Equipment Upgrade<br/>and Modernization Grant –<br/>Photographic Technology</b> | <b>FUNDS REQUESTED:</b><br><b>\$ 237,861</b> |
| <b>SPONSORING AGENCY:</b><br><b>Florida Department of Education</b>                      |                                                                                                                        | Cash Match:<br><b>\$</b>                     |
| <b>PROPOSERS:</b><br><b>Ms. Eska Palmer, Photographic Technology Program<br/>Manager</b> |                                                                                                                        | SCF In-Kind Match:<br><b>\$ 0</b>            |

*College departments and participating personnel:* Dr. Ryan Hale, VP Institutional Effectiveness; Mr. Jamie Tracy, Assistant Dean, Humanities, Arts, and Letters, Mr. Christopher Bellanca, Department Chair, Art, Design, and Humanities; Ms. Eska Palmer, Program Manager of Photographic Technology

**GRANT SUMMARY:**

The Strengthening Career and Technical Education for the 21<sup>st</sup> Century Act offers funds to agencies that have a current need for equipment upgrades and modernization for an established postsecondary Perkins-V CTE Program. These funds will assist agencies in meeting industry standards, which will better equip students for future job opportunities in high-demand fields. In addition to high-skill, high-wage, in-demand jobs, the EUM grant also seeks:

- To support an efficient and effective use of funds.
- To provide solutions for a variety of educational and economic priority needs in Florida.
- To meet needs not readily addressed by other funding sources.




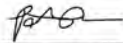

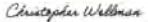




A primary identified need at State College of Florida, Manatee-Sarasota (SCF) is the aging or out-of-date equipment that needs to be updated to keep students current with industry standards. Another identified need is that SCF CTE students need more opportunities for and access to high-quality experiential learning.

The Photographic Technology program has equipment that needs to be updated due to the rapid pace of software and hardware improvements and introduction of new technologies in the industry. SCF submitted a proposal and has been invited to apply for a \$237,861 grant to purchase cameras, lenses, lighting, and production equipment for the Photographic Technology Program. The equipment will allow students to participate in hands-on learning with state-of-the art technology, hardware, and software used in industry.

The grant runs through June 30, 2025.

**Signature Page  
Proposal # 24-16**

By Signing below, I acknowledge that I have read and approve Grant Proposal No: 24-16.

|                                                                                                                                                                                                                               |                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| <br>_____<br>Jamie Tracy, Area Administrator                                                                                                 | 11/12/24<br>_____<br>Date |
| <br>_____<br>Erin Buckley, Director Sponsored Projects                                                                                       | 11/08/24<br>_____<br>Date |
| <br>_____<br>Paul Berkle, Director Human Resources                                                                                           | 11/08/24<br>_____<br>Date |
| <br>_____<br>Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs                                                             | 11/08/24<br>_____<br>Date |
| <br><small>Brittany N. Nielsen (Nov 9, 2024 11:00 EST)</small><br>_____<br>Dr. Brittany Nielsen, VP Student Services & Enrollment Management | 11/08/24<br>_____<br>Date |
| <br>_____<br>Christopher Wellman, Interim VP Finance & Administrative Services                                                               | 11/08/24<br>_____<br>Date |
| <br><small>Julie Jakway (Nov 12, 2024 12:10 EST)</small><br>_____<br>Julie Jakway, Senior VP                                               | 11/12/24<br>_____<br>Date |
| <br><small>Todd Fritch (Nov 8, 2024 09:08 EST)</small><br>_____<br>Dr. Todd Fritch, Executive VP & Provost                                 | 11/08/24<br>_____<br>Date |
| <br><small>Ryan Hale (Nov 12, 2024 14:05 EST)</small><br>_____<br>Dr. Ryan Hale, VP Institutional Effectiveness                            | 11/12/24<br>_____<br>Date |
| <br><small>Tommy Gregory, II (Nov 12, 2024 14:14 EST)</small><br>_____<br>Tommy Gregory, President                                         | 11/15/24<br>_____<br>Date |
| _____<br>Submitted to Board of Trustees                                                                                                                                                                                       | _____<br>Date             |

**STATE COLLEGE OF FLORIDA  
GRANT PROPOSAL**

|                                                                                                                         |                                                                                                                          |                                        |
|-------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| <b>NO: 24-17</b>                                                                                                        | <b>TITLE: Carl D. Perkins, Career and Technical Education Postsecondary Programs (Federal Funds) Fiscal Year 2024-25</b> | <b>FUNDS REQUESTED:<br/>\$ 441,353</b> |
| <b>SPONSORING AGENCY:<br/>Office of Workforce Education – Florida Department of Education</b>                           |                                                                                                                          | <b>SCF CASH MATCH:<br/>\$0</b>         |
| <b>PROPOSER:<br/>Dr. Ryan Hale, VP for Institutional Effectiveness, and Dr. Todd Fritch, Executive VP &amp; Provost</b> |                                                                                                                          | <b>SCF IN-KIND MATCH:<br/>\$0</b>      |

***College departments and participating personnel:*** Dr. Todd Fritch, Executive VP/Provost; Dr. Ryan Hale, VP for Institutional Effectiveness; Dr. Brittany Nielsen, VP, Student Services & Enrollment Management; Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs; A.S. Degree Program Managers and Academic Department Chairs

**GRANT SUMMARY:**

Through the Division of Career and Adult Education, the Florida Department of Education awards Carl D. Perkins federal grant funds to State College of Florida, Manatee-Sarasota to strengthen the College's A.S. (Career and Technical Education) and certificate programs, thereby augmenting the regional workforce. The Perkins grant includes support for enhancing many activities undertaken by the College's career and technical education programs.

On June 25, 2025, the Board of Trustees approved the Perkins application for \$369,690. The State will provide an additional roll forward allocation of \$71,663, bringing the Perkins FY25 total award to \$441,353.

**Signature Page**  
**Proposal # 24-17**

By Signing below, I acknowledge that I have read and approve Grant Proposal No: 24-17.

|                                                                                           |               |
|-------------------------------------------------------------------------------------------|---------------|
| <u>Ron Serpliss</u><br><small>Ron Serpliss (Nov 8, 2024 09:49 EST)</small>                | 11/08/24      |
| _____<br>Ron Serpliss, Area Administrator                                                 | _____<br>Date |
| <u>Erin Buckley</u>                                                                       | 11/08/24      |
| _____<br>Erin Buckley, Director Sponsored Projects                                        | _____<br>Date |
| <u>Paul Berkle</u>                                                                        | 11/08/24      |
| _____<br>Paul Berkle, Director Human Resources                                            | _____<br>Date |
| <u>Patricia Rand</u>                                                                      | 11/08/24      |
| _____<br>Dr. Patricia Rand, Associate Provost for Academic & Faculty Affairs              | _____<br>Date |
| <u>Brittany K. Nielsen</u><br><small>Brittany K. Nielsen (Nov 8, 2024 11:07 EST)</small>  | 11/08/24      |
| _____<br>Dr. Brittany Nielsen, VP Student Services & Enrollment Management                | _____<br>Date |
| <u>Christopher Wellman</u>                                                                | 11/08/24      |
| _____<br>Christopher Wellman, Interim VP Finance & Administrative Services                | _____<br>Date |
| <u>Julia Jakway</u><br><small>Julia Jakway (Nov 14, 2024 12:23 EST)</small>               | 11/14/24      |
| _____<br>Julie Jakway, Senior VP                                                          | _____<br>Date |
| <u>Todd Fritch</u><br><small>Todd Fritch (Nov 8, 2024 09:48 EST)</small>                  | 11/08/24      |
| _____<br>Dr. Todd Fritch, Executive VP & Provost                                          | _____<br>Date |
| <u>Ryan Hale</u><br><small>Ryan Hale (Nov 8, 2024 10:38 EST)</small>                      | 11/08/24      |
| _____<br>Dr. Ryan Hale, VP Institutional Effectiveness                                    | _____<br>Date |
| <u>Tommy Gregory, J.D.</u><br><small>Tommy Gregory, J.D. (Nov 15, 2024 14:44 EST)</small> | 11/19/24      |
| _____<br>Tommy Gregory, President                                                         | _____<br>Date |
| _____<br>Submitted to Board of Trustees                                                   | _____<br>Date |

| State College of Florida<br>Current Capital Projects With Budgets over<br>\$150,000 as of December 2024 | Board of Trustee<br>Approved Budget | Date Board<br>Approved<br>Budget | Source of Funds       | Project Justification | Total Estimated<br>Project Expense<br>Includes all Hard<br>and Soft costs | Comments               |
|---------------------------------------------------------------------------------------------------------|-------------------------------------|----------------------------------|-----------------------|-----------------------|---------------------------------------------------------------------------|------------------------|
| <b>Completed Since Last Report</b>                                                                      |                                     |                                  |                       |                       |                                                                           |                        |
| Building 8 Classroom Upgrades                                                                           | 200,000                             | 6/27/2023                        | CIF/Fund Balance      | Power Distribution    | 200,000                                                                   | Complete               |
| <b>In-Construction</b>                                                                                  |                                     |                                  |                       |                       |                                                                           |                        |
| Building Deferred Maintenance, Buildings 17, 29, 500                                                    | 1,270,000                           | 6/28/2022                        | \$8.2M State CARES    | Deferred Maint.       | 1,270,000                                                                 | Construction           |
| Roof Coatings, Collegewide                                                                              | 1,535,000                           | 6/28/2022                        | \$8.2M State CARES    | Deferred Maint.       | 1,535,000                                                                 | Construction           |
| HVAC Deferred Maintenance, Buildings 26                                                                 | 2,658,776                           | 6/28/2022                        | \$8.2M State CARES    | Deferred Maint.       | 2,658,776                                                                 | Construction           |
| Lighting Upgrades, Parking, Sidewalks, Neel Auditorium                                                  | 775,000                             | 6/27/2023                        | CIF, CO&DS            | Safety                | 775,000                                                                   | Construction           |
| CIT Faculty Offices                                                                                     | 350,000                             | 6/27/2023                        | CIF                   | Nursing Program       | 350,000                                                                   | Construction           |
| Permanent Roof Installation, Buildings 11, 17 & 23                                                      | 1,384,295                           | 10/29/2024                       | Capital Reserve       | Hurricane Damages     | 1,384,295                                                                 | Construction           |
| Hurricane Milton Damages, Placeholder                                                                   | 4,615,705                           | 10/29/2024                       | Capital Reserve       | Hurricane Damages     | 4,615,705                                                                 | Placeholder            |
| <b>Approval, Planning or Design</b>                                                                     |                                     |                                  |                       |                       |                                                                           |                        |
| Parrish Phase 1 Design                                                                                  | 2,209,750                           | 5/23/2023                        | PECO                  | Population Shift      | 2,209,750                                                                 | Design in process      |
| Building 2 Radiography X-Ray Equipment & Space Upgrade                                                  | 408,000                             | Pending                          | Capital Reserve/Grant | Deferred Maint.       | 408,000                                                                   | Pending Board Approval |
| Building 29 Nursing Auditorium Upgrades                                                                 | 750,000                             | Pending                          | Capital Reserve       | Deferred Maint.       | 750,000                                                                   | Pending Board Approval |
| Building 28 OT/PT HVAC Upgrades                                                                         | 300,000                             | Pending                          | Capital Reserve       | Deferred Maint.       | 300,000                                                                   | Pending Board Approval |
| Building 26 Science Walk-in Laboratory Refrigeration                                                    | 165,000                             | Pending                          | Capital Reserve       | Deferred Maint.       | 165,000                                                                   | Pending Board Approval |
| 3-Court Tournament Sand Volleyball                                                                      | 250,000                             | Pending                          | SABR & 25-26 CIF      | Deferred Maint.       | 250,000                                                                   | Pending Board Approval |
| Weight Room and Equipment Upgrades                                                                      | 500,000                             | Pending                          | SABR & 25-26 CIF      | Deferred Maint.       | 500,000                                                                   | Pending Board Approval |
| <b>Total</b>                                                                                            | <b>17,171,526</b>                   |                                  | <b>-</b>              | <b>-</b>              | <b>17,171,526</b>                                                         |                        |

Meeting of the  
 DISTRICT BOARD OF TRUSTEES OF STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
 December 10, 2024

**AGENDA ITEM:**

Use of Capital Reserve to address Hurricane Milton Damages

**UPDATE:**

The Board of Trustees at the October Board of Trustee meeting authorized college staff to execute contracts not to exceed \$6M from the funds transferred to capital projects to address damages caused by Hurricane Milton per Procedure 5.18.07. Any such contracts or expenditures will be reported to the Board of Trustees post award at the next regular Board of Trustees meeting. The following purchase orders/contracts, exceeding the \$325,000 per contract threshold, have been executed:

| Vendor              | Purpose                                        | Amount      |
|---------------------|------------------------------------------------|-------------|
| The Garland Company | Permanent Roof Install, Buildings<br>11,17,23. | \$1,384,295 |

**FISCAL IMPACT:** Yes

Funding Source: Capital Project Reserve

Will this action result in a Budget Amendment? Yes

If yes, indicate the dollar amount: \$6,000,000

**REQUESTED BY:** Chris Wellman, AVP, Facilities Management

**FUNDING VERIFIED AND APPROVED BY:** Julie Jakway  
**Vice President, Finance and Administrative Services**

Meeting of the  
DISTRICT BOARD OF TRUSTEES OF STATE COLLEGE OF FLORIDA, MANATEE-SARASOTA  
December 10, 2024

**AGENDA ITEM:**

Approval of Miscellaneous Capital Projects

**RECOMMENDATION:**

**The College recommends approval by the Board of Trustees the below listed Miscellaneous Capital Projects.**

**STAFF ANALYSIS:**

The following miscellaneous list of proposed capital projects have been developed based on condition assessments, programmatic needs, and the Capital Improvement Program. A preliminary budget has been established, fund source identified, and listed in the table below are the planned project delivery methods based on the scope and complexity of each project. The College will utilize the Architects/Engineers & Construction Managers that were selected through the continuing contract CCNA process, per Florida Statute.

| Miscellaneous Capital Projects                                    | Budget                                    | Funding                          | Delivery | Comments                                                                                                        |
|-------------------------------------------------------------------|-------------------------------------------|----------------------------------|----------|-----------------------------------------------------------------------------------------------------------------|
| <b>Building 2 Radiography X-Ray Equipment &amp; Space Upgrade</b> | \$268,000<br>\$140,000<br><hr/> \$408,000 | Capital Reserve<br>Perkins Grant | CM       | Replaces 20-year-old equipment and bldg. components.                                                            |
| <b>Building 29 Nursing Auditorium Upgrades</b>                    | \$750,000                                 | Capital Reserve                  | CM       | Replaces 20-Year-Old furniture, audio/video, and building components. Includes new electrical to fixed seating. |
| <b>Building 28 OT/PT HVAC Upgrades</b>                            | \$300,000                                 | Capital Reserve                  | CM       | Replaces 20-Year-old HVAC Equipment                                                                             |
| <b>Building 26 Science Walk-In Laboratory Refrigeration</b>       | \$165,000                                 | Capital Reserve                  | CM       | Replaces 20-Year Refrigeration System                                                                           |
| <b>3-Court Tournament Sand Volleyball</b>                         | \$250,000                                 | SABR & 25/26 CIF                 | CM       | Support Intramurals program and Athletics                                                                       |
| <b>Weight Room and Equipment Upgrades</b>                         | \$500,000                                 | SABR & 25/26 CIF                 | CM       | Provide students with current amenities.                                                                        |
| <b>Total</b>                                                      | <b>\$2,373,000</b>                        |                                  |          |                                                                                                                 |

**FISCAL IMPACT:** Yes

Funding Source: Capital Reserve, CIF, SABR & Perkins Grant

Will this action result in a Budget Amendment? Yes

If yes, indicate the dollar amount: \$2,373,000

**REQUESTED BY:** Chris Wellman, AVP, Facilities Management

**FUNDING VERIFIED AND APPROVED BY:** Julie Jakway  
**Vice President, Finance and Administrative Services**

**RULES FOR FINAL ACTION DECEMBER 10, 2024**

|   | <u>Rule</u> | <u>Title</u>                      | <u>Revision</u>                                                               |
|---|-------------|-----------------------------------|-------------------------------------------------------------------------------|
| 1 | 6HX14-2.41  | Retirement Enhancement Plan (REP) | Amendments necessitated by change to State benefits plan per s. 110.123, F.S. |



# RULE

|                  |                                                                                                                                            |                              |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| <b>Subject</b>   | <b>Retirement Enhancement Plan (REP)</b><br>Page 1 of 6                                                                                    | <b>Number:</b><br>6HX14-2.41 |
| <b>Authority</b> | F.S. 1001.64, 215.425                                                                                                                      | <b>Date:</b> 6/17/2014       |
| <b>History</b>   | Retirement Incentive Program 1992, 1994, 12/96, 9/05 Name Change to Retirement Enhancement Plan – REP, 10/18/06, 6/23/10, <u>6/17/2014</u> |                              |
| <b>Source</b>    | <u>Human Resources</u>                                                                                                                     |                              |

**I. Purpose:** ~~The Board establishes this Termination of Retirement Enhancement Plan (REP).~~

A. The REP was established by the Board to:

- ~~1.A.~~ Enhance retirement benefits to reward employees who have provided lengthy service to State College of Florida (SCF).
- ~~2.B.~~ Encourage retention of employees with significant knowledge and experience at SCF through the normal Social Security retirement age.
- ~~3.C.~~ Manage College costs while continuing to provide an employee benefit.

B. Due to circumstance beyond the control of the SCF, payments for certain benefits made pursuant to the REP must be terminated, effective immediately. This action is required in order to comply with Florida law and a mandate from the State of Florida, Division of Retirement.

**II. Definitions:**

- A. “Daily Rate of Pay” – an employee’s regular annual or contracted salary (excluding any salary for additional positions, overloads or stipends) for a specific fiscal year divided by the number of annual duty days for the employee’s position.
  - 1. For Teaching Faculty – the annual or contracted salary means the salary for the contracted period, exclusive of any supplemental, interim, substitute, overload, or unique or special contracts for instructional support services above and beyond the faculty member’s usual contracted services to the College.
  - 2. For Executive, Instructional Departmental Administrators, Institutional Administrators/Middle Managers and Professional Support Staff, the annual or contracted salary means the salary for the contracted months (usually twelve) exclusive of any overtime or other salary supplements of any kind or amount.
- B. “Date of Separation” – the last date of regular employment.

- C. “Date of Termination” – ~~Effective Date~~December 31, 2024, after which no further health and life insurance subsidy payments shall be made under the REP.
- D. “Hourly Rate of Pay” – a “career” employee’s hourly wage (excluding any pay for additional positions or stipends) based on the salary schedule in the SCF Operating Budget and the individual’s rate per hour reported in the salary spreadsheets approved annually by the Board of Trustees or approved per SCF Payroll Authorizations.
- ~~E.D.~~ “Regular Employee” – a person filling an SCF position approved by the Board of Trustees. The position may be designated either full-time or part-time. The person Subject Retirement Enhancement Plan (REP) filling the position must be appointed to the position on a regular basis.
- ~~F.E.~~ “Retirement Program Benefits” – those benefits provided under this program.
- ~~G.F.~~ “Terminal Pay Benefits” – those benefits normally provided to employees who resign, retire, or otherwise terminate their employment with the College. Such benefits are defined and enumerated in Board of Trustees Rules, and specifically include payment of a portion of accumulated Sick Leave and Vacation Leave.
- ~~H.G.~~ “Years of Service at SCF” – the total number of years of employment as a regular employee in a regular budgeted position with SCF. A year of service at SCF is one day more than one-half (1/2) the number of days in a contract/fiscal year or equivalent.

**III. Program for employees who were hired prior to October 1, 2005:** In addition to normal Terminal Pay and Benefits, State College of Florida offers the following incentives to those employees who qualify under the provisions of this program:

- A. Payment for accumulated Sick Leave: two and one-half percent (2 ½%) of accumulated sick leave for every year of SCF creditable service beyond ten (10) years, to a maximum of twenty (20) additional years, at the employee’s final daily or hourly rate of pay, but in no case, shall an employee be paid out more earned sick leave than that which is allowed by Florida statute. ~~No further payments under this paragraph A. shall be made after the last eligible employee hired prior to October 1, 2005 is no longer employed.~~
- B. ~~Payment~~For employees who retire before ~~effective date~~December 31, 2024, payment of a subsidy (the “Subsidy”) of the group health insurance premium, not to exceed the College rate on January 1, 2006 for program coverage provided to the individual employee by the College, for the first five (5) year term after retirement, or until ~~effective date~~December 31, 2024, whichever occurs first. ~~No further payments under this paragraph B. shall be made on or after ~~effective date~~December 31, 2024.~~  
~~The Subsidy shall be reviewed during the budget process periodically, and, subject to the maximum rate as of January 1, 2006 as set forth above, may be changed from time to time, based on budget considerations.~~
- C. ~~The insurance premiums will cease at such time retiree accepts employment with an employer that offers health insurance with an employer provided subsidy of at least 75% of the premium for individual coverage.~~
- ~~D. In the event the employee becomes eligible for Medicare during such five (5) year term. Medicare becomes the primary coverage and SCF health insurance becomes the~~

~~secondary coverage. SCF reserves the right to make adjustments to the health insurance package in accordance with Medicare and/or College health plan changes.~~

~~E. Payment For employees who retire before ~~effective date~~December 31, 2024, payment of premiums for the Retiree group life insurance policy, provided through the Florida College System Risk Management Consortium, which includes accidental death and dismemberment (AD&D), for five (5) years, or until ~~effective date~~December 31, 2024, whichever occurs first. No further payments under this paragraph C. shall be made on or after ~~effective date~~December 31, 2024.~~

~~D.F.~~ Retiree exit package to include: Staff Member Parking Decal; SCF ID Card; access to events sponsored by SCF at the same rate as regular SCF employees; scholarship for credit and non-credit class charges (as included for SCF regular employees) for the retiree; and access to attraction and merchandise discount cards offered to regular employees.

**IV. Eligibility:** To receive benefits under Paragraph III of this program, the employee must meet the following criteria:

- A. Be a regular employee, eligible for all SCF benefits.
- B. Upon the Date of Separation, have completed a minimum of ten (10) Years of Service at SCF, and be at least 62 years old; or have at least 30 years of service with an FRS employer, and 10 years of service at State College of Florida and be at least 55 years old.
- C. Retire no later than the completion of the academic/contract year of the employee's 67th birthday.
- D. Retire under an approved State of Florida retirement system in accordance with the time frames listed below:
  - 1. Teaching faculty shall retire no later than the end of the academic year of the faculty member's 67th birthday, subject to required DROP dates if enrolled in that program.
  - 2. Executives, Instructional Departmental Administrators, Institutional Administrators/Middle Managers, Professional Support Staff and Career Employees, shall retire no later than the end of the contract year of the employee's 67<sup>th</sup> birthday, subject to required DROP dates if enrolled in that program.

**V. Program for employees ~~who were hired on or after October 1, 2005, who retired before ~~effective date~~December 31, 2024:~~** In addition to normal Terminal Pay and Benefits, State College of Florida offers the following incentives to those employees who qualify under the provisions of this program

- A. Payment for accumulated Sick Leave in accordance with standard sick leave payout according to SCF Rule # 6HX14.45 Sick Leave for All Employees.
- B. ~~Payment For employees who retire before ~~effective date~~December 31, 2024, payment of the Subsidy on the group health insurance premium as noted in Section III.B. hereof, for the first three (3) year term after retirement, or until ~~effective date~~December 31,~~

2024, whichever occurs first. No further payments under this paragraph B. shall be made on or after ~~effective date~~December 31, 2024.

~~C. The insurance premiums will cease at such time retiree accepts employment with an employer that offers health insurance with an employer provided subsidy of at least 75% of the premium for individual coverage.~~

~~D. In the event the employee becomes eligible for Medicare during such three (3) year term, Medicare becomes the primary coverage and SCF health insurance becomes the secondary coverage. SCF reserves the right to make adjustments to the health insurance package in accordance with Medicare and/or College health plan changes.~~

~~E. Payment For employees who retire before ~~effective date~~December 31, 2024, payment of premiums for the Retiree group life insurance policy, provided through the Florida College System Risk Management Consortium, which includes accidental death and dismemberment (AD&D), for three (3) years, or until ~~effective date~~December 31, 2024, whichever occurs first. No further payments under this paragraph C. shall be made on or after ~~effective date~~December 31, 2024.~~

D.F. Retiree exit package to include: Staff Member Parking Decal; SCF ID Card; access to events sponsored by SCF at the same rate as regular SCF employees; scholarship for credit and non-credit class charges (as included for SCF regular employees) for the retiree; and access to attraction and merchandise discount cards offered to regular employees.

**VI. Eligibility:** To receive benefits under Paragraph V. of this program, the employee must meet the following criteria:

A. Be a regular employee, eligible for all SCF benefits.

B. Upon the Date of Separation have completed a minimum of fifteen (15) Years of Service at SCF, and be at least 62 years old; or have at least 30 years of service with an FRS employer, and fifteen (15) years of service at State College of Florida and be at least 55 years old, and

C. Retire no later than the completion of the academic/contract year of the employee's 67th birthday, or ~~effective date~~December 31, 2024, whichever occurs first.

D. Retire before ~~effective date~~December 31, 2024 under an approved State of Florida retirement system in accordance with the time frames listed below:

1. Teaching faculty shall retire no later than the end of the academic year of the faculty member's 67th birthday, subject to required DROP dates if enrolled in that program.

2. Executives, Instructional Departmental Administrators, Institutional Administrators/Middle Managers, Professional Support Staff and Career Employees, shall retire no later than the end of the contract year of the employee's 67<sup>th</sup> birthday, subject to required DROP dates if enrolled in that program.

**VII. Other Provisions:**

A. Except as otherwise provided herein, employees eligible to participate in this program shall be required to give written notice of the intent to retire no later than three (3)

months prior to the date upon which separation for retirement hereunder shall be effective. President may waive the three (3) month notice for exceptional circumstances.

- B. Each Employee has only one opportunity to retire and receive benefits under this program. If the employee fails to give notice or does not officially retire within the appropriate time frames, he/she shall not be eligible to participate in this program and will forfeit future opportunity to participate.
- C. The College reserves the right to amend this program at any time, subject to the approval of the Board of Trustees. Any termination of the program must specifically address whether all benefit payments under the program will immediately cease or whether the termination will permit existing benefits that are already in pay status to be continued but prohibit any new payments to employees who have not started drawing benefits prior to the program termination date.
- D. Employees hired on or after October 1, 2005, who retire on or after [effective date]December 31, 2024 shall be ineligible to receive benefits under this program.
- ~~D. All employees currently eligible for the State College of Florida Retirement Plan, may elect to retire under the provisions of that plan on or before June 30, 2006. Those employees who do not so elect shall be entitled to the provisions of the new State College of Florida Retirement Enhancement Plan.~~

#### **VIII. Procedure for Applying:**

- A. Except as otherwise provided herein, ~~the~~ an eligible employee must submit an application for retirement through the Office of Human Resources at least three (3) months prior to the effective date.
- B. Prior to Date of Separation, the employee must provide the Executive Director, Human Resources with a statement from an approved State of Florida retirement system reflecting the final calculation of years of creditable service as defined by such retirement system.

#### **IX. Payments:**

- A. Employees will receive normal Terminal Pay Benefits for unused Vacation and Sick Leave in accordance with Board Rules to the SCF BENCOR Special Pay Plan, if eligible.
- B. Payment for accrued Sick Leave under Paragraph III and V.A. hereof, will be paid to the SCF BENCOR Special Pay Plan, if eligible, upon presentation by the employee to the Executive Director, Human Resources, or designee, of proof that he/she has retired under an approved State of Florida Retirement System, or CCORP/SMORP.
- C. Payments for the group health and life insurance premiums under Paragraph III.B. and V. B. and E., hereof will be made directly to the insuring agency until permanently discontinued, effective [effective date]December 31, 2024.~~and will begin effective upon the Date of Separation. However, in the event the retired employee does not present proof of retirement payment of such premiums will cease and the retired employee will repay SCF for the prior paid premiums.~~

- D. Payment of premiums for group health and life and AD&D insurance program coverage's will be permanently discontinued, effective ~~effective date~~ December 31, 2024. ~~cease upon the death of the retired employee.~~
- E. ~~If the retiree does not provide an affidavit annually during open enrollment, stating that s/he is not employed with an employer who provides premium payments equivalent to 75% of an individual health plan, the retiree will be dropped from the SCF health plan as of January 1, of the succeeding year.~~
- F. In accordance with Florida Law, the amounts payable to an employee under the REP as health insurance subsidy and life insurance premiums when combined with all other amounts actually or constructively paid to the employee as salary, benefits or perquisites for employment services not yet rendered, will not exceed an amount equal to 20 weeks of pay. To the extent that the combined amounts exceed 20 weeks of pay, the amounts payable for health insurance subsidy and life insurance premiums will be reduced or terminated as necessary for the combined payments to fall within the limit.
- ~~F.G.~~ Retiree may elect to continue on the SCF health plan after SCF no longer provides the health insurance subsidy, providing payment is made within ~~no later than~~ one (1) month of the termination ~~prior to the expiration~~ of SCF payments.
- ~~H.~~ ~~If the full premium is greater than the SCF subsidy, the retiree must provide the difference, in accordance with College policy.~~
- ~~G.I.~~ In the event of death of the retired employee, any unpaid portion of the payments due under IX A. and IX B. above will be made to the beneficiary designated under the State of Florida retirement system under which the employee retired.

**X. Restrictions:**

Employees not choosing to take advantage of this Retirement Program will receive Terminal Pay Benefits upon retirement in accordance with applicable SCF Board rules.

# RULE

|                  |                                                                                                                                     |                              |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| <b>Subject</b>   | <b>Retirement Enhancement Plan (REP)</b>                                                                                            | <b>Number:</b><br>6HX14-2.41 |
| <b>Authority</b> | F.S. 1001.64, 215.425                                                                                                               | <b>Date:</b> 12/10/2024      |
| <b>History</b>   | Retirement Incentive Program 1992, 1994, 12/96, 9/05 Name Change to Retirement Enhancement Plan – REP, 10/18/06, 6/23/10, 6/17/2014 |                              |

**I. Purpose:** Termination of Retirement Enhancement Plan (REP).

- A. The REP was established by the Board to:
  - 1. Enhance retirement benefits to reward employees who have provided lengthy service to State College of Florida (SCF).
  - 2. Encourage retention of employees with significant knowledge and experience at SCF through the normal Social Security retirement age.
  - 3. Manage College costs while continuing to provide an employee benefit.
- B. Due to circumstance beyond the control of the SCF, payments for certain benefits made pursuant to the REP must be terminated, effective immediately. This action is required in order to comply with Florida law and a mandate from the State of Florida, Division of Retirement.

**II. Definitions:**

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  - 1. For Teaching Faculty – the annual or contracted salary means the salary for the contracted period, exclusive of any supplemental, interim, substitute, overload, or unique or special contracts for instructional support services above and beyond the faculty member’s usual contracted services to the College.
  - 2. For Executive, Instructional Departmental Administrators, Institutional Administrators/Middle Managers and Professional Support Staff, the annual or contracted salary means the salary for the contracted months (usually twelve) exclusive of any overtime or other salary supplements of any kind or amount.
- B. “Date of Separation” – the last date of regular employment.
- C. “Date of Termination” – December 31, 2024, after which no further health and life insurance subsidy payments shall be made under the REP.

- D. “Hourly Rate of Pay” – a “career” employee’s hourly wage (excluding any pay for additional positions or stipends) based on the salary schedule in the SCF Operating Budget and the individual’s rate per hour reported in the salary spreadsheets approved annually by the Board of Trustees or approved per SCF Payroll Authorizations.
- E. “Regular Employee” – a person filling an SCF position approved by the Board of Trustees. The position may be designated either full-time or part-time. The person Subject Retirement Enhancement Plan (REP) filling the position must be appointed to the position on a regular basis.
- F. “Retirement Program Benefits” – those benefits provided under this program.
- G. “Terminal Pay Benefits” – those benefits normally provided to employees who resign, retire, or otherwise terminate their employment with the College. Such benefits are defined and enumerated in Board of Trustees Rules, and specifically include payment of a portion of accumulated Sick Leave and Vacation Leave.
- H. “Years of Service at SCF” – the total number of years of employment as a regular employee in a regular budgeted position with SCF. A year of service at SCF is one day more than one-half (1/2) the number of days in a contract/fiscal year or equivalent.

**III. Program for employees who were hired prior to October 1, 2005:** In addition to normal Terminal Pay and Benefits, State College of Florida offers the following incentives to those employees who qualify under the provisions of this program:

- A. Payment for accumulated Sick Leave: two and one-half percent (2 ½%) of accumulated sick leave for every year of SCF creditable service beyond ten (10) years, to a maximum of twenty (20) additional years, at the employee’s final daily or hourly rate of pay, but in no case, shall an employee be paid out more earned sick leave than that which is allowed by Florida statute. No further payments under this paragraph A. shall be made after the last eligible employee hired prior to October 1, 2005 is no longer employed.
- B. For employees who retire before December 31, 2024, payment of a subsidy (the “Subsidy”) of the group health insurance premium, not to exceed the College rate on January 1, 2006 for program coverage provided to the individual employee by the College, for the first five (5) year term after retirement, or until December 31, 2024, whichever occurs first. No further payments under this paragraph B. shall be made on or after December 31, 2024.
- C. For employees who retire before December 31, 2024, payment of premiums for the Retiree group life insurance policy, provided through the Florida College System Risk Management Consortium, which includes accidental death and dismemberment (AD&D), for five (5) years, or until December 31, 2024, whichever occurs first. No further payments under this paragraph C. shall be made on or after December 31, 2024.
- D. Retiree exit package to include: Staff Member Parking Decal; SCF ID Card; access to events sponsored by SCF at the same rate as regular SCF employees; scholarship for credit and non-credit class charges (as included for SCF regular employees) for the retiree; and access to attraction and merchandise discount cards offered to regular employees.



**IV. Eligibility:** To receive benefits under Paragraph III of this program, the employee must meet the following criteria:

- A. Be a regular employee, eligible for all SCF benefits.
- B. Upon the Date of Separation, have completed a minimum of ten (10) Years of Service at SCF, and be at least 62 years old; or have at least 30 years of service with an FRS employer, and 10 years of service at State College of Florida and be at least 55 years old.
- C. Retire no later than the completion of the academic/contract year of the employee's 67th birthday.
- D. Retire under an approved State of Florida retirement system in accordance with the time frames listed below:
  - 1. Teaching faculty shall retire no later than the end of the academic year of the faculty member's 67th birthday, subject to required DROP dates if enrolled in that program.
  - 2. Executives, Instructional Departmental Administrators, Institutional Administrators/Middle Managers, Professional Support Staff and Career Employees, shall retire no later than the end of the contract year of the employee's 67<sup>th</sup> birthday, subject to required DROP dates if enrolled in that program.

**V. Program for employees hired on or after October 1, 2005, who retired before December 31, 2024:** In addition to normal Terminal Pay and Benefits, State College of Florida offers the following incentives to those employees who qualify under the provisions of this program

- A. Payment for accumulated Sick Leave in accordance with standard sick leave payout according to SCF Rule # 6HX14.45 Sick Leave for All Employees.
- B. For employees who retire before December 31, 2024, payment of the Subsidy on the group health insurance premium as noted in Section III.B. hereof, for the first three (3) year term after retirement, or until December 31, 2024, whichever occurs first. No further payments under this paragraph B. shall be made on or after December 31, 2024.
- C. For employees who retire before December 31, 2024, payment of premiums for the Retiree group life insurance policy, provided through the Florida College System Risk Management Consortium, which includes accidental death and dismemberment (AD&D), for three (3) years, or until December 31, 2024, whichever occurs first. No further payments under this paragraph C. shall be made on or after December 31, 2024.
- D. Retiree exit package to include: Staff Member Parking Decal; SCF ID Card; access to events sponsored by SCF at the same rate as regular SCF employees; scholarship for credit and non-credit class charges (as included for SCF regular employees) for the retiree; and access to attraction and merchandise discount cards offered to regular employees.

**VI. Eligibility:** To receive benefits under Paragraph V. of this program, the employee must meet the following criteria:

- A. Be a regular employee, eligible for all SCF benefits.

- B. Upon the Date of Separation have completed a minimum of fifteen (15) Years of Service at SCF, and be at least 62 years old; or have at least 30 years of service with an FRS employer, and fifteen (15) years of service at State College of Florida and be at least 55 years old, and
- C. Retire no later than the completion of the academic/contract year of the employee's 67th birthday, or December 31, 2024, whichever occurs first.
- D. Retire before December 31, 2024 under an approved State of Florida retirement system in accordance with the time frames listed below:
  - 1. Teaching faculty shall retire no later than the end of the academic year of the faculty member's 67th birthday, subject to required DROP dates if enrolled in that program.
  - 2. Executives, Instructional Departmental Administrators, Institutional Administrators/Middle Managers, Professional Support Staff and Career Employees, shall retire no later than the end of the contract year of the employee's 67<sup>th</sup> birthday, subject to required DROP dates if enrolled in that program.

**VII. Other Provisions:**

- A. Except as otherwise provided herein, employees eligible to participate in this program shall be required to give written notice of the intent to retire no later than three (3) months prior to the date upon which separation for retirement hereunder shall be effective. President may waive the three (3) month notice for exceptional circumstances.
- B. Each Employee has only one opportunity to retire and receive benefits under this program. If the employee fails to give notice or does not officially retire within the appropriate time frames, he/she shall not be eligible to participate in this program and will forfeit future opportunity to participate.
- C. The College reserves the right to amend this program at any time, subject to the approval of the Board of Trustees. Any termination of the program must specifically address whether all benefit payments under the program will immediately cease or whether the termination will permit existing benefits that are already in pay status to be continued but prohibit any new payments to employees who have not started drawing benefits prior to the program termination date.
- D. Employees hired on or after October 1, 2005, who retire on or after December 31, 2024 shall be ineligible to receive benefits under this program.

**VIII. Procedure for Applying:**

- A. Except as otherwise provided herein, an eligible employee must submit an application for retirement through the Office of Human Resources at least three (3) months prior to the effective date.
- B. Prior to Date of Separation, the employee must provide the Executive Director, Human Resources with a statement from an approved State of Florida retirement system reflecting the final calculation of years of creditable service as defined by such retirement system.

**IX. Payments:**

- A. Employees will receive normal Terminal Pay Benefits for unused Vacation and Sick Leave in accordance with Board Rules to the SCF BENCOR Special Pay Plan, if eligible.
- B. Payment for accrued Sick Leave under Paragraph III and V.A. hereof, will be paid to the SCF BENCOR Special Pay Plan, if eligible, upon presentation by the employee to the Executive Director, Human Resources, or designee, of proof that he/she has retired under an approved State of Florida Retirement System, or CCORP/SMORP.
- C. Payments for the group health and life insurance premiums under Paragraph III.B. and V. B. and E., hereof will be made directly to the insuring agency until permanently discontinued, effective December 31, 2024.
- D. Payment of premiums for group health and life and AD&D insurance program coverage's will be permanently discontinued, effective December 31, 2024.
- E. In accordance with Florida Law, the amounts payable to an employee under the REP as health insurance subsidy and life insurance premiums when combined with all other amounts actually or constructively paid to the employee as salary, benefits or perquisites for employment services not yet rendered, will not exceed an amount equal to 20 weeks of pay. To the extent that the combined amounts exceed 20 weeks of pay, the amounts payable for health insurance subsidy and life insurance premiums will be reduced or terminated as necessary for the combined payments to fall within the limit.
- F. Retiree may elect to continue on the SCF health plan after SCF no longer provides the health insurance subsidy, providing payment is made within one (1) month of the termination of SCF payments.
- G. In the event of death of the retired employee, any unpaid portion of the payments due under IX A. and IX B. above will be made to the beneficiary designated under the State of Florida retirement system under which the employee retired.

**X. Restrictions:**

Employees not choosing to take advantage of this Retirement Program will receive Terminal Pay Benefits upon retirement in accordance with applicable SCF Board rules.



