

State of Florida



## Public Service Commission

CAPITAL CIRCLE OFFICE CENTER • 2540 SHUMARD OAK BOULEVARD  
TALLAHASSEE, FLORIDA 32399-0850

**-M-E-M-O-R-A-N-D-U-M-**

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**DATE:** May 16, 2018  
**TO:** Carlotta Stauffer, Commission Clerk, Office of Commission Clerk  
**FROM:** Curtis J. Williams, Office of Industry Development & Market Analysis *CW*  
**RE:** Docket No. 20180099-TP - Document Filing *17*

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Please file the attached document from James Forstall in Docket No. 20180099-TP. The document includes FTRI's response to staff Data Request - No. 1 regarding FTRI's FY 2018/2019 Proposed Budget.

Please let me know if you have any questions.

Attachments

RECEIVED-PPSC  
2018 MAY 16 PM 3:23  
COMMISSION  
CLERK

## Curtis Williams

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**From:** James Forstall <jforstall@ftri.org>  
**Sent:** Tuesday, May 08, 2018 2:45 PM  
**To:** Curtis Williams  
**Cc:** Greg Fogleman; Pamela Page; Jeff Bates; Mark Long; Cayce Hinton; McCabe, Thomas M.; Robert Telfer; bbascom@ftri.org  
**Subject:** Re: FTRI FY 2018/2019 Proposed Budget Data Request - No. 1  
**Attachments:** FTRI FY 2018 Data Request No. 1 - FINAL.pdf; FTRI Data Request No. 1 - Attachment for Question #3.pdf; FTRI Data Request No. 1 - Attachment for Question #4 Evergreen.pdf; FTRI Data Request No. 1 - Attachment for Question #4 Culpepper.pdf; FTRI Data Request No. 1 - Attachment for Question #5 (2).pdf; FTRI Data Request No. 1 - Attachment for Question #6.pdf

Curtis,

Attached please find FTRI's responses to Data Request No. 1. Additionally, I've labeled each folder to correspond with the specific question it pertains to. Please let me know should you need clarification or have additional questions.

Regards,

James

On Tue, May 1, 2018 at 5:00 PM, James Forstall <jforstall@ftri.org> wrote:  
Thanks Curtis. We'll get busy with this.

James

On Tue, May 1, 2018 at 3:55 PM, Curtis Williams <CJWillia@psc.state.fl.us> wrote:

Hello James,

Staff has completed its initial review of FTRI's FY 2018/2019 Proposed Budget and request FTRI's response to the items listed below. **Please forward your responses to me by May 8, 2018.**

1. **In Line Item 2-Interest Income**, FTRI estimates that Interest Income will increase by \$14,846 from FY 2017/2018 using FTRI's current interest rate of .65%.

Please provide FTRI's applicable interest rate for each quarter during FY 2017/2018. Does FTRI anticipate increases in its applicable interest rate in future quarters during FY 2018/2019?

2. **In Line Item 12-VCP Hearing Impaired**, FTRI proposes a \$253,000 decrease from FY 2017/2018 estimated expense. FTRI also, in part, attributes the decrease to a year over year decrease in equipment distribution of 7.7%.

Please provide additional information on what the 7.7% represents and if you anticipate decreases in the future.

3. **In Line Item 22-Regional Distribution Centers**, FTRI proposes a \$5,395 increase from FY 2017/2018 estimated expense. FTRI explains that the majority of the increase is for costs associated with auditing the regional distribution centers.

Please explain the audit process and scope. Please provide the name of the auditor and number of years providing service to FTRI.

4. **In Line Item 27-Accounting/Auditing**, FTRI proposes a \$5,833 increase from FY 2017/2018 estimated expense for a compensation analysis to be performed by an independent third party.

Please identify the name of the auditor, scope of work to be performed, and if a request for proposals was extended.

5. **In Line Item 28-Legal**, FTRI proposes \$55,823 for legal expense for FY 2018/2019.

Please forward all legal services invoices and any other relevant legal services billing information for January 2017-present. In your response, please include itemized invoices to FTRI with date of services, charges for the services, hours of service, price per hour, and a detailed description of the services provided by legal counsel.

6. **In Line Item 34-Insurance-Hlth/Life/Dsblty**, FTRI proposes a 6.85% premium increase. FTRI also states that employees contribute 5% of the premium for single coverage and 25% of the difference between single and dependent coverage.

Please provide details on the analysis conducted to arrive at the 6.85% insurance premium increase. Please also explain the analysis performed to arrive at the 5% and 25% employee contribution levels.

7. **In Line Item 41-Retirement**, FTRI proposes a \$7,993 increase from FY 2017/2018 estimated expenses. FTRI also states that the estimate is lower than anticipated due to employee turnover.

Please provide additional detail on the impact of employee count on FTRI's retirement expense.

8. **In Line Item 42-Employee Compensation**, FTRI proposes a \$29,213 increase from FY 2017/2018 estimated expense.

Please explain the basis for the 3% increase in compensation for the nine budgeted employees.

Please let me know if you have any questions.

Thank You

**Curtis J. Williams**

Public Utility Analyst

Office of Industry Development & Market Analysis

Florida Public Service Commission

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Thanks

*James*

James Forstall, Executive Director  
Florida Telecommunications Relay Inc. (FTRI)

1820 E Park Avenue, Suite 101  
Tallahassee, FL 32301  
[jforstall@ftri.org](mailto:jforstall@ftri.org)  
850-270-2641 (VP)



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Thanks

*James*

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## FTRI FY 2018/2019 Proposed Budget Data Request - No. 1

Staff has completed its initial review of FTRI's FY 2018/2019 Proposed Budget and request FTRI's response to the items listed below. Please forward your responses to me by May 8, 2018.

1. In Line Item 2-Interest Income, FTRI estimates that Interest Income will increase by \$14,846 from FY 2017/2018 using FTRI's current interest rate of .65%.

*Please provide FTRI's applicable interest rate for each quarter during FY 2017/2018. Does FTRI anticipate increases in its applicable interest rate in future quarters during FY 2018/2019?*

**FTRI Response:** QTR-1 2017/2018 = 0.37%

QTR-2 2017/2018 = 0.65%

QTR-3 2017/2018 = 0.65%

QTR-4 2017/2018 = 0.65%

FTRI using the actual current year data for FY 2017/2018 has budgeted the actual interest rate currently received for the year end estimate FY 2017/2018 and the budget FY 2018/2019. FTRI does not have any information to indicate an interest rate increase or decrease for our account in FY 2018/2019.

2. In Line Item 12-VCP Hearing Impaired, FTRI proposes a \$253,000 decrease from FY 2017/2018 estimated expense. FTRI also, in part, attributes the decrease to a year over year decrease in equipment distribution of 7.7%.

*Please provide additional information on what the 7.7% represents and if you anticipate decreases in the future.*

**FTRI Response:** A portion of our note stated, "A detailed analysis was used, taking into account the year over year decrease of 7.7% and the difference in business cycle between the first half of the fiscal year and the second half of the fiscal year." Additionally, it was our oversight in not noting that this percentage applies to cordless VCPH phones only.

In the note quoted above, two items are looked at, both concerning the business cycle as it pertains to the second half of our fiscal year. The first item being a historical decrease calculated between the two most recent years of data for the second half of our fiscal year, 2016 and 2017, January through June for each year. This decrease of January through June 2016 compared to January through June 2017 is 7.7 percent for cordless VCPH. The second item is the business cycle of our fiscal year whereas the second half of the fiscal year is historically higher than the first half.

The VCPH Hearing Impaired line item is comprised of several different phone models both corded and cordless, each having different percentage rates of distribution and each having different histories to calculate from based on when the model was introduced into the system. Some units were introduced in 2017 and some in the 2016 fiscal year for example.

Line item 12 VCP Hearing Impaired budget is 21.27% lower than YE Estimate 2017/2018. It is possible that future periods may see decreases year over year for certain types of phone equipment.

3. In Line Item 22-Regional Distribution Centers, FTRI proposes a \$5,395 increase from FY 2017/2018 estimated expense. FTRI explains that the majority of the increase is for costs associated with auditing the regional distribution centers.

*Please explain the audit process and scope. Please provide the name of the auditor and number of years providing service to FTRI.*

**FTRI Response:** Attached are the procedures, audit schedule, and audit forms used to conduct an equipment inventory and outreach materials inventory audit. FTRI staff, Amelia Mauldin, EDP Manager, has over 23 years of experience working with the FTRI program and Clare Tucker, Distribution Program Coordinator II, has over 12 years of experience working with the FTRI program alternately conduct the audits. FTRI decided to conduct biennial audits to reduce cost associated with conducting audits. Cost associated with audits are hotel, meals, and travel.

4. In Line Item 27-Accounting/Auditing, FTRI proposes a \$5,833 increase from FY 2017/2018 estimated expense for a compensation analysis to be performed by an independent third party.

*Please identify the name of the auditor, scope of work to be performed, and if a request for proposals was extended.*

**FTRI Response:** Attached are two proposals submitted for FTRI's review. Selection has not been made at this time because funding is currently not available.

5. In Line Item 28-Legal, FTRI proposes \$55,823 for legal expense for FY 2018/2019.

*Please forward all legal services invoices and any other relevant legal services billing information for January 2017-present. In your response, please include itemized invoices to FTRI with date of services, charges for the services, hours of service, price per hour, and a detailed description of the services provided by legal counsel.*

**FTRI Response:** Attached are the legal service invoices.

6. In Line Item 34-Insurance-Health/Life/Disability, FTRI proposes a 6.85% premium increase. FTRI also states that employees contribute 5% of the premium for single coverage and 25% of the difference between single and dependent coverage.

*Please provide details on the analysis conducted to arrive at the 6.85% insurance premium increase. Please also explain the analysis performed to arrive at the 5% and 25% employee contribution levels.*

**FTRI Response:** Attached is the notice from NTCA our benefits provider notifying us that the average GHP medical insurance increase is 9.9%. FTRI budgets as close to actual as possible. FTRI's actual increase in premium for the GHP medical insurance premium for 2017 over 2016, the data available at the time of budget preparation for this item, was 6.85%.

The employee contribution levels of 5% and 25% were set by the Board of Directors several years ago. The previous contribution level was 0% for employee and 20% of the dependent level coverage.

7. In Line Item 41-Retirement, FTRI proposes a \$7,993 increase from FY 2017/2018 estimated expenses. FTRI also states that the estimate is lower than anticipated due to employee turnover.

*Please provide additional detail on the impact of employee count on FTRI's retirement expense.*

**FTRI Response:** At the beginning of Fiscal Year 2017/2018 FTRI had 10 staff members. In August 2017, the accounts payable position became vacant when the employee terminated employment. In February 2018 one of FTRI's customer service employees was terminated. FTRI employee count was down to 8 staff members as of February 2018. FTRI is actively recruiting for the accounts payable position. FTRI's year-end estimate was prepared anticipating the accounts payable position would be filled in the second half of the fiscal year. In

summary FTRI budgeted for 10 positions for FY 2017-2018, during the year 2 positions were vacant for a period, therefore no payments were required for the terminated employees after the date of termination.

8. In Line Item 42-Employee Compensation, FTRI proposes a \$29,213 increase from FY 2017/2018 estimated expense.

*Please explain the basis for the 3% increase in compensation for the nine budgeted employees.*

**FTRI Response:** As directed by the Board of Director's, FTRI includes funding for 3% compensation increase. This funding allows the board the flexibility to award compensation increases for performance in an amount up to the 3% for individual employees.





## RDC Audit Procedures

**Rationale:** To maintain program integrity with Regional Distribution Centers (RDC), periodic audits are to be conducted to ensure that RDCs are compliant with RDC Procedure Manual.

**Audit Requirements:** The audit shall include, but is not limited to,

- Actual physical count of the equipment inventory
- Physical inspection and matching of serial numbers of all demo equipment and simulators
- Review the RDC Procedures Manual (*as needed*)
- Review weekly / monthly paperwork
- Review weekly / monthly paperwork on Excel
- Train the RDC staff to utilize the weekly / monthly forms on Excel
- Train the RDC staff (*as needed*)
- Actual physical count of the outreach material inventory

**FTRI Auditor:** FTRI's EDP Manager will be responsible for conducting the inventory audit of an RDC. The EDP Manager will coordinate the dates with the RDC to accomplish the audit requirements. To utilize resources efficiently, the EDP Manager will conduct multiple RDC audits when possible. For best result, the audit should be scheduled and conducted in the beginning of a month following the close-out of the previous month.

**Reporting:** The EDP Manager will prepare a report to FTRI Management detailing the activities of the audit along with any recommendations.

Month/Year \_\_\_\_\_

Equipment Type	Actual Physical Inventory New
XLC2	
XLC3.4	
A400	
Alto	
Amplidect 350	
CL60	
BT914	
CSC-500	
XLC7BT	
Alto Plus	
4425 TTY	
425 TTY	
4400 TTY	
TR-75	
HA-40	
VCO	
VCO/HCO TTY	
HD-40S	
CR200	
CapTel 840 Plus	
CapTel 840	

RDC Staff: \_\_\_\_\_

Audit Conducted by: \_\_\_\_\_  
(Make Copy For RDC)



# Florida Telecommunications FTRI Relay, Inc.

Date: \_\_\_\_\_

## RDC Outreach Materials Audit Form

RDC Name: \_\_\_\_\_

RDC#: \_\_\_\_\_

RDC Staff: \_\_\_\_\_

(Individual present during the audit)

**Item**

**Actual Number of Packages**

**FTRI Materials**

	Full	Open	Full	Open
New Passalong Brochures (application & COA combo)	Eng _____	Spa _____	_____	_____
Specialized Equipment Receipt	Eng _____	Spa _____	_____	_____
Conditions of Acceptance	Eng _____	Spa _____	_____	_____
5-Minute Hearing Test Cards	Eng _____	Spa _____	_____	_____
CapTel Brochures	Eng _____	Spa _____	_____	_____
EDP Inserts	_____	_____	_____	_____
FTRI Tablecloth (burgundy with gray logo)	_____	_____	_____	_____
FTRI Pull-up Display (Tabletop)	_____	_____	_____	_____
FTRI Pull-up Display (Floor)	_____	_____	_____	_____
Yard signs	_____	_____	_____	_____
Car magnets	_____	_____	_____	_____
Plexi frames	_____	_____	_____	_____

**Relay Materials**

General Relay Brochure (w/ Snapshots)	Eng _____	Spa _____	_____	_____
General Relay Brochure (w/ Kid on Beach)	Eng _____	Spa _____	_____	_____
FL PSC Lifeline Assistance Brochure	Eng _____	Spa _____	_____	_____
Palm Cards (Loud & Clear)	Eng _____	Spa _____	_____	_____
Phone Display Applications (CSC-500 & A400)	_____	_____	_____	_____
Brochure Holders	_____	_____	_____	_____

FTRI Office Use Only

FTRI Audit Conducted By: \_\_\_\_\_

Date Audit Conducted: \_\_\_\_\_

*FTRI RDC Audit Schedule 2018-2019*

RDC	Date of Last Audit	Follow-up Audit Date	RDC Audit Letter Sent	RDC Comfirmed	Audit Completed
RDC #2	7-26-2016	7/2018			
RDC #4	6-22-2017	6/2019			
RDC #5	7-8-2016	7/2018			
RDC #7	7-28-2016	7/2018			
RDC #9	4-18-2017	4/2019			
RDC #10	4-17-2017	4/2019			
RDC #14	4-19-2017	4/2019			
RDC #16	6-20-2017	6/2019			
RDC #17	6-13-2017	6/2019			
RDC #18	6-14-2016	7/2018			
RDC #19	6-14-2017	6/2019			
RDC #20	6-21-2017	6/2019			
RDC #21	6-19-2017	6/2019			
RDC #22	9-19-2016	9/2018			
RDC #24	7-11-2016	7/2018			
RDC #25	6-30-2016	7/2018			
RDC #26	7-29-2016	7/2018			
RDC #27	6-15-2017	6/2019			
RDC #28	6-16-2017	6/2019			
RDC #29	4-6-2017	4/2019			
RDC #30	1-25-2016	7/2018			
RDC#32	6-13-2017	6/2019			
RDC#33		6/2019			

- RDC 2, 7, 26 & 30 will be the first audits conducted July 2018
- RDC 5, 18, 22, 24, 25, will be the second audits July 2018
- RDC 5, 24, 25, & 29 will be conducted by Clare no hotel needed, only car rental. She will conduct these audits within a single day for each
- The remaining RDCs audits will be conducted after January 2019 – June 30, 2019.

# A Proposal to Conduct a Compensation Analysis for Florida Telecommunications Relay, Inc

ORIGINAL



Evergreen Solutions, LLC

August 1, 2017

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# A Proposal to Conduct a Compensation Analysis for Florida Telecommunications Relay, Inc

Submitted to:

Mr. James Forstall, Executive Director  
Florida Telecommunications Relay, Inc.  
1820 E. Park Avenue, Suite 101  
Tallahassee, Florida 32301

Submitted by:



Evergreen Solutions, LLC  
2878 Remington Green Circle  
Tallahassee, Florida 32308  
(850) 383-0111 (ph) / (850) 383-1511 (fax)

**August 1, 2017**

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# *Response to Request for Proposal*

Evergreen Solutions is well qualified to conduct a Compensation Analysis for the Florida Telecommunications Relay, Inc. (FTRI), as our consultants have conducted hundreds of similar studies for non-profit and public sector organizations throughout the country, including many within the State of Florida. We include the following sections in our response to the Request for Proposal (RFP):

1) Firm's Background and Qualifications; 2) Select Relevant Experience; 3) Approach and Work Plan; 4) Proposed Timeline; 5) Proposed Cost; and 6) Proposed Project Team.

## **1. Firm's Background and Qualifications**

Evergreen Solutions, LLC is a national, multidisciplinary, public sector management consulting firm, which specializes in working with non-profit organizations as well as public sector organizations across the nation. We provide a unique approach, rather than the "consulting as usual" approach, by partnering with our clients to find innovative, real world solutions to public management.

Evergreen Solutions was formed in 2004 provide a modern, practical alternative to the typical consulting options. The firm is made up of management and information technology professionals as well as strategic partners who came together to form an innovative alternative that places clients and their needs before any individual, model, or corporate goal.

Our main focus is on people, management, and technology. This focus allows our team to provide a broad variety of services, including, but not limited to: compensation analyses; classification studies; salary and benefits surveys; staffing studies; performance appraisal reviews; workload analyses; disparity studies; training assessments; and strategic planning.

We invite you to browse our Web site at [www.ConsultEvergreen.com](http://www.ConsultEvergreen.com) or visit us on Facebook at [www.facebook.com](http://www.facebook.com) or LinkedIn at [www.linkedin.com](http://www.linkedin.com) for more information about our services, staff, and past experience.



Evergreen Solutions assists public sector professionals in exercising control over the inter-related elements that determine success or failure. We do that by applying a situation-responsive discipline that emphasizes: full visibility into the entire organization through research and discovery; a spirit of partnership with staff and leadership; sound recommendations based on best practices and proven methods; and a practical go-forward plan that leads to quantifiable results.

Collectively, the members of the Evergreen Solutions Team have: extensive experience in conducting compensation analyses for non-profits and public sector organizations throughout the country; comprehensive experience in all components vital to the successful completion of this engagement; knowledge of relevant Florida statutes and regulations as well as federal regulations; objectivity and flexibility due to the fact that we have no vested interests; and specialized analytical tools that we bring to the project.





Clients nationwide have been successfully implementing recommendations from our team of professional consultants for decades. Evergreen has contracted with non-profit, public sector, quasi-governmental organizations in 45 states throughout the country. Exhibit 1 includes a list of some of the clients that our consultant team has worked with, or is currently in contract to work with, in the State of Florida that involved work similar in scope to the services being requested by FTRI.

Exhibit 1 Select Florida Public Sector Clients		
Florida Sheriff's Association	City of Bartow	Hernando County
Florida Association of Counties	City of Holmes Beach	Citrus County
Florida League of Cities	City of Ft. Myers	Escambia County
Florida Board of Bar Examiners	City of St. Petersburg	Pinellas County
FL Assoc. of Court Clerks & Comptrollers	City of Daytona Beach	Sarasota County
Florida Prepaid Tuition	City of Orange City	Martin County
Association for Institutional Research	City of Zephyrhills	Bay County
Confidential Office Personnel Association	City of Pensacola	Gulf County
Manatee County Sheriff's Office	City of Plant City	Village of Pinecrest
Okaloosa County Sheriff's Office	City of Plantation	Village of North Palm Beach
Martin County Sheriff's Office	City of Sarasota	Village of Islamorada
Nassau County Sheriff's Office	City of Sunny Isles Beach	Town of Ponce Inlet
Alachua County Sheriff's Office	City of Punta Gorda	Town of Juno Beach
Clay County Sheriff's Office	City of Deltona	Town of Palm Beach
Marion County Sheriff's Office	City of Temple Terrace	Town of Cutler Bay
Collier County Sheriff's Office	City of Kissimmee	Town of Davie
Pasco County Sheriff's Office	City of High Springs	WorkNet Pinellas (a/k/a CareerSource Pinellas)
Flagler County Sheriff's Office	City of Clermont	Sarasota-Manatee Airport Authority
Gadsden County Sheriff's Office	City of Orlando	Hillsborough Area Transit Authority
City of Fort Walton Beach	City of North Port	Toho Water Authority
City of Panama City	City of Gainesville	Tampa Bay Water
City of Destin	City of Key West	Health Care District of Palm Beach County
City of Sebring	City of Coral Springs	Keys Energy Services
City of Winter Park	City of Clermont	Orlando-Orange County Expressway Authority
City of Palm Beach Gardens	City of Cocoa	Manatee County Utility
City of Bunnell	City of North Miami Beach	Pinellas County Housing Authority
City of Bushnell	City of Dania Beach	Tampa Housing Authority
City of Ocala	City of Doral	Glades General Hospital
City of Venice	City of Sunrise	Loxahatchee River District
City of Tamarac	Manatee County	Southwest Florida Water Management District
City of St. Cloud	Sumter County	St. Johns River Water Management District
City of Lake City	Seminole County	Keys Aqueduct Authority
City of Cape Coral	Gadsden County	Brevard County Property Appraiser's Office
City of Largo	Monroe County	Gadsden County Property Appraiser's Office
City of Hollywood	Charlotte County	Jacksonville Aviation Authority
City of Maitland	Osceola County	Solid Waste Authority of Palm Beach County
City of Dunedin	Alachua County	Community Action Stops Abuse
City of Holly Hill	Highlands County	Seacoast Utility Authority



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## 2. Select Relevant Experience

Because Evergreen has conducted well over 400 studies similar in scope to the services being requested by FTRI, we include in this section only a sample of some of our more recent public sector work in the State of Florida.

### Compensation and Classification Study Florida Court Clerks and Comptrollers

Evergreen Solutions was retained by the Florida Court Clerks and Comptrollers to assist with a comprehensive compensation and classification study. Evergreen conducted orientations, collected job analysis data, assessed the labor market, and made recommendations.



### Salary Survey Update Florida Association of Court Clerks (FACC)

Evergreen Solutions was hired by FACC to update an earlier salary survey that was conducted and prepared by another firm. The main tasks included surveying previous targets using benchmark classifications to assess changes over time, providing an external assessment summary and making a final presentation to include discussions of challenges and opportunities and provide a strategic direction for the Association.



### Labor Market Study Florida Association of Court Clerks

Evergreen was again retained by Florida Association of Court Clerks (FACC) Service Group to assess the competitiveness of its rates. The analysis included looking at labor market pay rates, consulting market hourly rates, and current FACC rates for 18 positions to determine the competitiveness of the discount currently offered to the State of Florida for services provided by FACC. The study found that FACC offered high quality services at a fraction of the private sector market costs.



### Compensation and Classification Plan Update Florida League of Cities

Evergreen Solutions was hired by the Florida League of Cities to assist with an update to their classification and compensation plan. The study will include, conducting a job evaluation, reviewing and revising job descriptions, assessing the market position of the League compared to public, private, and non-profit organizations in the Tallahassee and State of Florida markets. Recommendations were provided to improve the market competitiveness of the overall plan. **Note:** Evergreen has worked with the League on several other occasions.



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## Compensation Study Florida Association of Counties

The Florida Association of Counties contracted with Evergreen Solutions to conduct a compensation and classification study for its internal staff. The Association represents each of Florida's 67 Counties, and its members include County Managers and County Commissioners from throughout the State. Major issues that were addressed by this study included:

- ensuring that the Association recruited and retained highly capable professionals;
- developing a compensation and classification system that standardized human resource management while providing flexibility for future growth;
- developing a compensation system that rewarded higher work performance; and
- developing a classification system that maintained flexibility while offering mobility for employees.

Evergreen Solutions staff conducted orientation sessions, focus groups by department, collected job analysis data, reviewed the external market, and developed a system for managing compensation and classification.



## Website and Salary Survey Development Florida Public Personnel Association

The Florida Public Personnel Association (FPPA) contracted with Evergreen Solutions to redesign and build their current website. As part of this project Evergreen Solution will also rebuild the FPPA Salary Survey tool which is available to all members and widely used throughout the State of Florida. Evergreen hosted the initial survey and has served as the webmaster for the Association for the past three years.



## Human Resource Audit Association of Institutional Research

Evergreen Solutions was retained by the Association for Institutional Research to conduct a Human Resource Audit of its current operations. The assigned tasks included the assessment of the overall practices and procedures utilized of human resource management; a review and revisions to the employee handbook; an audit of personnel files to ensure data and content compliance; a test of compliance with TIAA-CREF retirement compliance; an assessment of the employment process; a review of a sample of annual employment letters; an analysis of the FLSA status of current employees; a verification that EEO was in compliance with OFCCP requirements for federal funding recipients; the identification of those procedures that needed to be added as required by law or best practice; and a comprehensive report summarizing the Association's next steps.



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## Organizational Study Florida Prepaid College Fund

The Florida Prepaid College Program retained Evergreen Solutions to conduct a review of the Program's Executive Director position, determine if the organizational structure of the Program was aligned with the future strategic goals, and assess the competitiveness of the salary levels for Program staff. Evergreen's consultants conducted anecdotal research to assess whether a Deputy Director position was warranted and establish a detailed position description for the Executive Director. In addition, statistical analysis of market salary data evaluated the competitiveness of the Program for qualified staff.



## Operational Review of Association Operations Florida Institute of Certified Florida Accountants

Evergreen Solutions was retained by the Florida Institute of Certified Public Accountants (FICPA) Task Force for association management to review the day-to-day operations of FICPA and recommendations for service delivery and efficiency improvements. The methodology included conducting focus groups, meeting with each manager, soliciting anonymous input from employees on the working environment, reviewing major trends impacting associations, and comparing FICPA outcomes to best practices and peer benchmarks. A report was prepared that included over 20 recommendations and action plans.



## Market Survey Confidential Office Personnel Association (COPA)

Evergreen Solutions was hired by the Confidential Office Personnel Association (COPA) to conduct a Market Survey. Evergreen's consultants collected and analyzed market data against peer organizations to determine whether inequities existed in salaries within COPA and made recommendations to improve the current compensation structure as necessary.



## Pay, Compensation, and Classification Study Community Action Stops Abuse (CASA)

Evergreen Solutions was hired in late 2014 by CASA to conduct a comprehensive Pay, Compensation, and Classification Study for all employees and job classifications. Evergreen's consultants conducted employee orientations and focus groups at CASA's offices in St. Petersburg, Florida, and conducted a job analysis of all included positions. Evergreen's consultants further conducted a comprehensive salary survey of the regional and statewide labor market peers, and provided detailed recommendations for adjusting CASA's pay and classification structure.

**Note:** Evergreen was previously hired by CASA to conduct a compensation and classification study for all employees and job classifications.



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## Compensation and Classification Study WorkNet Pinellas

Evergreen Solutions was hired by WorkNet Pinellas, in St. Petersburg to provide a comprehensive analysis of its compensation and classification systems including an evaluation of market competitiveness and compensation structure, as well as internal equity and classification accuracy and equity for all WorkNet employees.

This study included a review of current compensation practices and the development of a compensation philosophy, defining the appropriate labor market to which the organization should be compared, evaluating the FLSA status of each position, making compensation restructuring recommendations for various jobs based on market data collected, completing an assessment of total compensation, and the provision of recommendations to assist with implementation. Employees were given the opportunity to attend orientation sessions, employee focus groups and participate in the Job Assessment Tool and Management Issues Tool processes for classification valuation as a component of these analyses.



## Salary Survey WorkNet Pinellas d/b/a CareerSource Pinellas

Evergreen Solutions was engaged in 2016 with CareerSource Pinellas to conduct a Salary Survey. Evergreen analyzed local market data taken from peer organizations to determine the appropriate compensation levels for benchmark positions. Recommendations for adjustments to the compensation plan were made.



## Pay Plan Market Value Study and Classification Analysis Florida Board of Bar Examiners

Evergreen was hired by the Florida Board of Bar Examiners (FBBE) to conduct a Pay Plan Market Value Study and Classification Analysis. Current pay plans and pay grades were reviewed against the market as well as benefit offerings. Internal equity was also reviewed. Evergreen's consultants administered the Job Assessment Tool to all employees to gather data regarding jobs performed. Classifications were revised as needed. In the end, recommendations were made for necessary adjustments to the FBBE's compensation plan.



## Classification and Compensation System Update Florida Sheriff's Association

Evergreen was hired by the Florida Sheriff's Association to conduct a Classification and Compensation System Update. Evergreen's consultants conducted a job analysis of each position using the Job Assessment Tool; updated all class descriptions; conducted a market survey of peers; created a competitive pay plan based on the job and market survey analysis; and provided recommendations that updated the current classification and compensation system.



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**Classification and Compensation Study  
Hillsborough Area Transportation Authority**

The Hillsborough Area Transit Authority selected Evergreen to conduct a comprehensive Compensation and Classification Study. The study was designed to progress through a series of tasks aimed at summarizing and defining the current classification and compensation system in place at the Authority; assess the equity of the system to ensure that, internally, the Authority was homogeneously compensating positions for the level of work actually performed; and systematically assess the ability of those systems to compete with the external labor market.

Evergreen worked closely with Authority leaders to evaluate, from the ground up, the current environment of the compensation and classification system in place. This included assessing the system from multiple angles to identify areas of possible compression, stagnation, and overall systematic weakness. From this point, Evergreen worked with the Authority to define a final total compensation and classification philosophy. Together, completion of these tasks allowed for clear identification of where the Authority was and where they wanted to be; ultimately allowing Evergreen to provide recommendations on steps to close the gap.

The second phase of the study involved an external analysis of the surrounding labor market's compensation levels. Using a survey approach, Evergreen determined market compensation levels for positions within the Authority by contacting multiple market peers. This analysis, in conjunction with results from the internal analysis, allowed Evergreen to provide recommendations on how the Authority could best structure their compensation and classification systems to remain competitive with the external labor market.



**Classification and Compensation Study  
Orlando-Orange County Expressway Authority**

The Orlando - Orange County Expressway Authority (OOCEA) has retained Evergreen Solutions to conduct a comprehensive compensation and classification study to determine whether the OOCEA possessed a compensation and classification system that was both equitable as compared to the external competitive employment market as well as equitable internally. The study included a complete classification analysis using the Job Assessment Tool job valuation methodology as well as a statistical assessment of internal conditions and an assessment of external equity including a salary survey of competing organizations. The report culminated with a series of findings and recommendations that were designed to alleviate any strains on the system and, if necessary, redesign or augment the existing system in place at the OOCEA.



**Classification and Compensation Study  
Sarasota-Manatee Airport Authority**

Evergreen Solutions was retained by Sarasota Manatee Airport Authority to conduct a detailed compensation and classification analysis of its workforce. Evergreen staff conducted job analysis to determine the best classifications for the work performed and analyzed pay ranges in the public and private sector to determine the appropriate pay levels for all included jobs. Recommendations were provided to improve the fairness and equity.



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**Classification and Compensation Study  
Ft. Pierce Utilities Authority**

The Fort Pierce Utilities Authority retained Evergreen Solutions to conduct a Compensation and Classification Study with a strong emphasis on internal and external equity. As part of the study, Evergreen's consultants collected and reviewed current environmental data present at FPUA; conducted a market salary and benefits survey and provided feedback regarding current market competitiveness; conducted a classification analysis to assess internal equity and the efficiency of the current classification plan; developed strategic positioning recommendations using market data and best practices; developed a compensation structure and cost transition schedule; and developed and submitted draft and final reports summarizing findings and recommendations.



**Salary Analysis  
Manatee County Utility**

Evergreen Solutions was retained by Manatee County Utilities to conduct a comprehensive salary survey and compensation analysis for its employees. The study identified classifications that were below market and that needed to be adjusted in future compensation actions.



**Salary, Benefits, and Position Classification Study  
Toho Water Authority**

Evergreen Solutions was hired by the Toho Water Authority to conduct a Salary, Benefits, and Position Classification Study and provide recommendations for implementation of a revised pay plan. The study included all employees and classifications in the Authority. As part of the study, the Evergreen's consultants conducted orientations, focus groups, and interviews with employees, and collected Job Assessment Tools (JATs) from employees. Evergreen Solutions consultants conducted a comprehensive salary and benefits survey of local and regional employers to assess the market competitiveness of the Authority. Finally, a detailed plan was developed to provide the Authority with specific steps to implement an equitable and competitive compensation plan.



**Compensation Study  
Tampa Bay Water**

Evergreen Solutions was retained by Tampa Bay Water to conduct a comprehensive evaluation of their compensation equity, plans, and practices. Emphasis was placed on market equity and the status of the Organization's pay plan vis-à-vis the external labor market. A salary survey including public and private sector peers was conducted and recommendations were made to improve competitiveness.



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**Compensation Study  
St. Johns River Water Management District**

Evergreen Solutions was hired by the St. Johns River Water Management District to conduct a Compensation Study including all employees. The Evergreen Solutions Team conducted focus groups and interviews at multiple district locations, conducted a comprehensive salary survey of the regional labor market peers, and provided detailed recommendations for adjusting the District's pay structure. The Evergreen Team also developed an implementation plan that included all employees.



**Position and Compensation Study  
Florida Keys Aqueduct Authority**

Evergreen Solutions was engaged with the Florida Keys Aqueduct Authority (FKAA) to provide a comprehensive analysis of its compensation and classification system including an evaluation of market competitiveness, as well as internal equity and classification accuracy for all FKAA employees. This study included: defining the appropriate labor market to which the organization should be compared, conducting a job factor analysis of each position, making compensation restructuring recommendations for various jobs based on market data collected, completing an assessment of total compensation, and the provision of recommendations to assist with implementation.



**Total Compensation Study  
Southwest Florida Water Management District**

Evergreen Solutions was retained by Southwest Florida Water Management District (District) to assist with a total compensation study. The study focused on the market competitiveness of the District's pay structure and used a combination of internal and external data analysis to form recommendations geared toward ensuring the continued success of the District in recruiting and retaining qualified employees. The result of the study was a sound compensation plan that conformed to the needs and characteristics of the District.

By nature, the study focused on internal and external equity. To address equity internally, the study involved focus groups, current salary and benefits analyses, and a review of position duties throughout the internal hierarchy. To assess external equity, Evergreen conducted a comprehensive assessment of compensation trends amongst the District's market peers. In the end, a number of recommendations were made by the Evergreen Team on how employees would move through the pay structure/system as a result of transfers, promotions, or demotions; how to pay employees whose base pay has reached the maximum of their pay range or value of their position; the appropriate mix of pay and benefits for District employees; how often the District should adjust pay scales and survey the market; timing of implementation; and on how to keep the system fair and competitive over time.





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### 3. Approach and Work Plan

In this section we provide you with our approach to providing the requested work as well as a detailed work plan identifying the tasks, activities, and milestones necessary to accomplish the work included in the scope of services of the RFP.

#### 3.1 Evergreen's Approach

Evergreen Solutions is uniquely qualified to conduct a Compensation Analysis for Florida Telecommunications Relay, Inc. (RTFI) as our team includes recognized experts in human resources management and understands that there is not a "one size that fits all" solution to compensation management. Our approach is built on working collaboratively with all parties to make sound, implementation-focused recommendations.

Specifically, we have developed a implementation strategy that: focuses on market competitiveness; recognizes that compensation is comprised of more than just base pay levels; reflects changes in recent compensation strategies; designs custom solutions that take into account the diversity of needs present in the organization and allows you to select the components and options that best meet your overall needs; and produces a structure that improves the organization's ability to recruit, reward, motivate, and retain talent in a competitive environment that includes both public and private sector employers.

We will work closely with FTRI's designated Project Manager as well as any key staff throughout the process to ensure constant communication of issues, concerns, and potential outcomes. In addition, we will work closely with your staff to gain a solid understanding of your current operational realities, challenges, and desired outcomes. Moreover, Evergreen Solutions will work with you to balance your need to meet your performance goals while carefully managing your resources.

Compensation management has undergone significant transformation in the private sector and over time public sector organizations have mirrored these changes. While compensation once centered on the separate administration of base pay and core benefits, a shift has occurred that has transformed compensation management. Progressive organizations now recognize that—to effectively recruit, reward, motivate, and retain employees—compensation management requires strategic thinking and planning.

Compensation management must support an organization's overall strategic direction. To accomplish this, effective organizations design a compensation philosophy that details where an organization wants to be in relation to the market in key areas. These key areas include cash compensation, benefits, and work/life balance. Compensation is thus a reflection of the organization's philosophy.

Evergreen Solutions realizes that we will need to tailor our approach to fit the operating, fiscal, and competitive needs of the organization. Recommendations must always reflect competitive needs while supporting the organization's overall mission.

Listed below is an overview of the typically recommended approach that Evergreen takes when conducting a study of this nature.



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**Kick-Off Meeting** - Evergreen Solutions begins each engagement by meeting with our client's leadership team. Frequently, this initial meeting will accomplish several goals, including:

- finalizing the project work plan;
- identifying milestone and deliverable dates;
- gaining insight into the management structure and approach;
- collecting classification and compensation data;
- identifying additional data needs; and
- developing preliminary schedules for subsequent tasks.

At this time, we will also request a copy of the employee database that reflects current classification and compensation data.

**Developing the Compensation Philosophy** - An organization's compensation philosophy is designed to support the overall business strategy. It can take many forms, but ultimately the compensation philosophy selected will guide the structure of the overall compensation system. Evergreen Solutions will meet with the client's leadership team to ascertain the client's overall business strategy and document the various alternatives that are available to support that strategy. Based on the client's needs, Evergreen Solutions will provide the client with a comprehensive compensation philosophy to guide subsequent decisions. Typically, a consultant can facilitate the process and make recommendations for the compensation philosophy, but the decision will ultimately rest with the organization itself. It is imperative for the client to agree upon a compensation philosophy prior to establishing the remaining components of the compensation system.

**Compensation** - Our approach to compensation analysis is based on the belief that compensation should be organization-specific, fair, equitable, and directly tied to strategic goals. To ensure that all these criteria are met, we will conduct an extensive analysis on the relevant labor market, the internal structure and inter-relatedness of jobs within the organization, and the relative worth of jobs within the organization vis-à-vis the compensation philosophy.

The most traditional component of a total compensation program is base pay (fixed pay). However, inclusion of benefits in total compensation strategy is not a new concept. Provision of benefits was originally a recruitment tool, though over time the provision of core benefits has become an expectation. Research shows that public sector organizations commonly use superior benefits packages as a way to offset structural disadvantages in base pay. The purpose of the survey is to collect information for comparison to current offerings, and making recommendations for change consistent with the parameters of the organization's compensation philosophy.

**Market Survey** - A key component of assessing compensation is to consider market position, which is sometimes referred to as external equity or competitiveness. Evergreen's consultants wait until well into the classification analysis to design the market survey to ensure that jobs are understood, anomalies in classification characteristics are documented, and sufficient input has been received. The market survey will obtain standard range information related to minimum, midpoint, and maximum salaries. Data collection will focus on the public sector, but will include information from the private sector where applicable. Further, we will look to include any employers to whom the organization has recently lost employees.

**Benchmarks** - One of the most important components of the external assessment is in the selection and utilization of benchmark positions for the labor market survey. We will work with the client to identify the appropriate number of benchmark positions to best suit the client's needs in the labor market survey. Based on our experience, we have found that it is simply not practical to survey all



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positions within the organization—the resulting surveys become too cumbersome for labor market peers to complete, and the response rate on the whole suffers. We ensure, through multiple checks and balances, that the benchmark positions chosen will represent a broad spectrum of positions across the organization, from all job families, pay levels, and functional areas.

**Targets** - To conduct an external labor market assessment, we work with the client to identify the most appropriate targets to survey. Evergreen selects peer organizations based on the local labor competition, regional markets, and class-specific markets. Peer organizations should be those organizations that compete with the client for labor in at least one job family. An appropriate mix of peers in the public and private sectors will be included in the survey, and if necessary, augmented with published secondary data sources.

Typically, Evergreen waits until the outreach process has been completed to identify the complete list of market peers. This is because we often will uncover specific information during the focus group and interview sessions that identifies potentially critical survey targets. Ideally, we would like to work with the client after the outreach has been concluded to identify the final list of potential market peers.

An important factor of our methodology is that the client has the final approval of all aspects of the study. We will not proceed with the analysis unless the client is completely comfortable with the survey targets chosen. Often, there are different factors impacting an organization, such as proximity to a major metropolitan area, technology corridor, or specific market (i.e., military base), that have a direct effect on its ability to recruit and retain employees in specific positions. These factors have to be taken into account when selecting survey targets. Once the targets are selected and approved, the survey instrument is developed and sent to the client for final approval. Subsequent to client approval, the survey is then distributed to the targets in both paper and electronic formats.

Evergreen Solutions uses a four-fold method of communicating with respondents. Our staff notifies the target group that the survey is being sent or made available, confirms receipt, and encourages participation. Once the data are received, they are cleaned, validated, and summarized. A separate report is issued that shows the results of the salary survey.

**Compensation Administration Guidelines** - In order for clients to maintain the recommended compensation system, Evergreen develops compensation administration guidelines for use by the client after completion of the study. The guidelines will include recommendations on installation and continuing administration of the system. The team first conducts a review of current practices and procedures then assesses their effectiveness, compliance with legal guidelines, and applicability to the recommended system.

Once this review and assessment are complete, revisions to the current practices and/or new guidelines can be recommended, as needed. At a minimum, the recommendations will address areas such as:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay and benefits;



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- how often to adjust pay scales and survey the market;
  - timing of implementation; and
  - how to keep the system fair and competitive over time.

**System Maintenance** - Our goal is to produce recommendations that are effective and that can be maintained by our clients. We are strongly committed to providing transparent and replicable solutions. In essence, when we complete our core assignment, our goal is that our client's staff can maintain and update the system on their own. We are readily available to provide assistance, but our goal is to give our clients all the tools and training that are needed. Towards this end we will provide the Human Resources Department with all necessary tools and training to maintain the system over time.

### 3.2 Detailed Work Plan

In this section we include the work plan that Evergreen Solutions proposes to use to conduct the Compensation Analysis for FTRI. Evergreen understands that that FTRI has 10 positions that will be included in the study.

Our work plan consists of the following eight tasks:

- Task 1: Project Initiation
- Task 2: Evaluate the Current System
- Task 3: Develop Compensation Philosophy
- Task 4: Identify Market Survey Benchmarks and Approved List of Targets
- Task 5: Conduct Market Salary Survey and Provide External Assessment Summary
- Task 6: Develop Strategic Positioning Recommendations
- Task 7: Develop and Submit Draft and Final Reports
- Task 8: Develop Recommendations for Compensation Administration

#### Task 1.0 - Project Initiation

##### TASK GOALS

- Finalize the project plan with FTRI.
- Gather all pertinent data.
- Finalize any remaining contractual negotiations.
- Establish an agreeable final time line for all project milestones and deliverables.

##### TASK ACTIVITIES

1.1 Discuss with the FTRI Project Manager the following objectives:

- understand the mission and current compensation philosophy of FTRI (if any);



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- review our proposed methodology, approach, and project work plan to identify any necessary revisions and to assess any concerns;
  - reach agreement on a schedule for the project including all assignments and project milestones/deliverables; and
  - establish an agreeable communication schedule.
- 1.2 Identify potential challenges and opportunities for the study. Discuss the strategic direction of FTRI and some of the short- and long-term priorities. This activity serves as the basis for assessing where FTRI is going and what type of pay plan will reinforce current and future goals.
- 1.3 Obtain relevant materials, including:
- any previous projects, research, evaluations, or other studies that may be relevant to this project;
  - organizational charts for the departments and divisions, along with related responsibility descriptions;
  - current position and classification descriptions, salary schedule(s), and classification system; and
  - personnel policies and procedures, and the step placement policies.
- 1.4 Review and edit the project work plan and submit a schedule for the completion of each project task.

#### KEY PROJECT MILESTONES

- Comprehensive project management plan
- Comprehensive database of FTRI employees

#### Task 2.0 - Collect and Review Current Environmental Data

##### TASK GOAL

- Conduct a comprehensive preliminary evaluation of the existing compensation plan for FTRI.

##### TASK ACTIVITIES

- 2.1 Obtain the existing pay structure and compensation philosophy. Review the existing compensation structure and policies and look for potential problems to be resolved.
- 2.2 Determine the strengths and weaknesses of the current pay plan(s).
- 2.3 Complete an assessment of current conditions that details the pros and cons of the current system as well as highlights areas for potential improvement in the final adopted solution.



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## KEY PROJECT MILESTONES

- Review of existing compensation plan(s)
- Assessment of current conditions

### Task 3.0 – Develop Compensation Philosophy

#### TASK GOAL

- Facilitate the development of the compensation philosophy for FTRI.

#### TASK ACTIVITIES

- 3.1 Conduct a thorough review of all background materials related to the compensation system for FTRI.
- 3.2 Make recommendation for compensation philosophy based on input from previous steps.
- 3.3 Document accepted compensation philosophy based on input from the FTRI Project Manager.

#### KEY PROJECT MILESTONE

- Compensation philosophy

### Task 4.0 – Identify List of Market Salary Benchmarks and Approved List of Targets

#### TASK GOALS

- Identify the benchmark positions for the external labor market assessment.
- Identify and develop a comprehensive list of targets for conducting a successful external labor market assessment.

#### TASK ACTIVITIES

- 4.1 Identify, from the initial review, a list of classifications (benchmarks) to include in the labor market survey. **Note:** Evergreen will use all 10 positions within FTRI as benchmarks for the salary survey.
- 4.2 Review with the RTFI Project Manager peer organizations that should be included in the salary survey. **Note:** Evergreen will work with the FTRI Project Manager to identify up to 20 targets for the salary survey.
- 4.3 Develop a preliminary list of organizations for the external labor market survey, placing a comparative emphasis on characteristics such as:
  - size of the organization;
  - geographic proximity to the Tallahassee area;
  - economic and budget characteristics; and
  - other demographic data.



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- 4.4 Develop a list of survey targets. Develop a system for use of secondary data including potential sources and weighting of secondary data, if necessary.
  - 4.5 Review survey methodology with the FTRI Project Manager and refine survey methodology prior to distribution of survey.
  - 4.6 After approval of survey methodology, develop contact list of peer organizations and notify peers of impending survey.

#### KEY PROJECT MILESTONES

- Final list of benchmark positions for the external labor market assessment
- Initial list of survey peers
- Survey methodology
- Final list of survey organizations and contacts

#### Task 5.0 – Conduct Market Survey and Provide External Assessment Summary

##### TASK GOALS

- Conduct the external labor market salary survey.
- Provide a summary of the survey results to the FTRI Project Manager for review.

##### TASK ACTIVITIES

- 5.1 Prepare a customized external labor market salary survey for the FTRI Project Manager approval. Discuss questions and categories for the market survey with the FTRI Project Manager.
- 5.2 Contact the targets for electronic completion of the survey. Provide paper copies by fax, if requested.
- 5.3 Conduct necessary follow-up through e-mails, faxes, and phone calls.
- 5.4 Collect and enter survey results into Evergreen Solutions' electronic data analysis tools.
- 5.5 Validate all data submitted.
- 5.6 Develop summary report of external labor market assessment results.
- 5.7 Submit summary report of external labor market assessment results to the FTRI Project Manager.

#### KEY PROJECT MILESTONES

- Market survey instrument
- Summary report of external labor market assessment results



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## Task 6.0 – Develop Strategic Positioning Recommendations

### TASK GOALS

- Assess the appropriateness of the current compensation philosophy for FTRI.
- Develop a plan for all employees, providing issue areas and preliminary recommendations for strategic improvement.

### TASK ACTIVITIES

- 6.1 Identify the compensation philosophy and accompanying thresholds.
- 6.2 Using the market salary data collected in **Task 5.0**, determine the proper pay plan including number of grades, steps, and ranges.
- 6.3 Identify highly competitive positions within FTRI and customize recommendations for compensation where required.
- 6.4 Produce a pay plan(s) that best meets the needs of FTRI from an external equity standpoint.

### KEY PROJECT MILESTONES

- Proposed compensation strategic direction, taking into account external equity
- Plan for addressing unique, highly competitive positions

## Task 7.0 – Develop and Submit Draft and Final Reports

### TASK GOALS

- Develop and submit a draft and final report of the Compensation Analysis for FTRI.
- Present final report.

### TASK ACTIVITIES

- 7.1 Produce a comprehensive draft report that captures the results of each previous step. The report will include a description of the recommended pay plan as well as an implementation strategy and cost analysis.
- 7.2 Submit the comprehensive draft report to the FTRI Project Manager for review and approval.
- 7.3 Make edits and submit necessary copies of the final report to the FTRI Project Manager.
- 7.4 Present final report to FTRI.
- 7.5 Develop a communication plan for sharing study results with employees.
- 7.6 Develop implementation database to communicate the process and progress of this project to the FTRI Project Manager.





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7.7 Develop a plan for maintaining recommendations over time.

KEY PROJECT MILESTONES

- Draft and final reports
- Final presentation
- Communication plan
- Implementation and maintenance database

Task 8.0 – Develop Recommendations for Compensation Administration

TASK GOAL

- Develop recommendations for the continued administration by FTRI staff to sustain the recommended compensation structure.

TASK ACTIVITIES

8.1 Develop recommendations and guidelines for the continued administration and maintenance of the compensation structure, including recommendations and guidelines related to:

- how employees will move through the pay structure/system as a result of transfers, promotions, or demotions;
- how to pay employees whose base pay has reached the maximum of their pay range or value of their position;
- the proper mix of pay;
- how often to adjust pay scales and survey the market;
- the timing of implementation; and
- how to keep the system fair and competitive over time.

8.2 Recommend recruitment/retention strategies, where appropriate.

8.3 Present recommendations to the FTRI Project Manager for review.

KEY PROJECT MILESTONES

- Recommendations for compensation administration
- Recommendations for recruitment/retention policies



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#### 4. Proposed Timeline

Evergreen Solutions possesses the staff, skills, and tools to conduct the Compensation Analysis for FTRI in 60 days from the execution of a contract. This is based on a tentative start date of August 15, 2017, and a completion date of October 15, 2017. This timeline can be modified in any way to best meet the needs of FTRI.

#### 5. Proposed Cost

Evergreen Solutions, LLC is pleased to present our proposed cost to conduct a Compensation Analysis for FTRI. Evergreen Solutions is committed to providing the highest quality consulting services to our client partners for a reasonable cost. Evergreen Solutions is fortunate that our overhead is minimal and our expenses are reasonable so we can pass that cost savings on to our clients.

Our total, not-to-exceed, fixed cost to complete all tasks identified in our detailed work plan in Section 3.2 is \$5,500. This cost is all inclusive, and includes travel costs, fringe benefits, indirect costs (overhead), and all other out-of-pocket expenses.

Evergreen is willing to negotiate the time, scope, and cost of the basic tasks, or any other options that FTRI wishes to identify. Evergreen Solutions federal employer identification number is 20-1833438.

#### 6. Proposed Project Team

The following paragraphs provide bio summaries of each team member's qualifications and experience related to his or her role in this engagement. Detailed resumes are available upon request.

**Dr. Jeff Ling – Project Principal.** Dr. Ling is Executive Vice-President of Evergreen Solutions and has been with the firm since its inception. He has more than 20 years consulting experience in the following areas: human resources; performance improvement; process analysis; strategic planning; statistical analysis; research methodology; data management; surveys and polling; technology analysis; change management; and risk analysis.

Dr. Ling has planned, organized, and managed studies on human resources assessment, survey analysis, government efficiency, technology planning, information utilization, public opinion, market expansion, and privatization. Each of these studies dealt with summarizing major alternatives for decision makers and providing viable recommendations. He has consulting experience in public sector evaluation, research management, efficiency analysis, survey analysis, statistical modeling, and technology planning.

Dr. Ling has worked with a multitude of clients in the capacity of Project Principal. He has worked on hundreds of engagements across the nation and includes work in state and local governments, school districts, institutions of higher education, quasi-governmental agencies, and private industry.

Dr. Ling has been instrumental in creating, reviewing, and evaluating the methodology employed by Evergreen Solutions on all human resource engagements. His background and skill set make him



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uniquely qualified for assessing organizational critical needs and strategy. He is also an expert in policy development and long-term planning.

A sample of the types of studies Dr. Ling has been involved with include:

- **Classification/Compensation**– He developed the methodology and techniques for organizations to employee for successful data collection and implementation based on internal and external equity needs. He has served as the Project Principal for hundreds of projects related to classification and compensation studies, including, but not limited to, the following non-profit and public sector organizations in the State of Florida: Association for Institutional Research; Florida Association of Counties; Florida Association of Court Clerks; Florida Institute of Certified Public Accountants; Florida Sheriff's Association; Florida League of Cities; Florida Prepaid College Fund; Confidential Office Personnel Association (COPA); Community Action Stops Abuse; Worknet Pinellas; Tampa Bay Water; Tampa Housing Authority; Seminole County; Orlando-Orange County Expressway Authority; Hillsborough Area Transit Authority; St. Johns River Water Management District; Glades General Hospital; Loxahatchee River District; Florida Keys Aqueduct Authority; Jacksonville Airport Authority; Health Care District of Palm Beach County, FL; Sarasota-Manatee Airport Authority; Manatee Utility Authority; City of Pensacola; City of Sarasota; City of Winter Park; City of Maitland; City of Lake City; City of Holmes Beach; City of Palm Beach Gardens; City of Coral Springs; City of Panama City; City of Ft. Walton Beach; City of Hollywood; City of Dania Beach; Miami-Dade County; Bay County; Gulf County; Manatee County; Sarasota County; Seminole County; Escambia County; Alachua County; Monroe County; Hernando County; Highlands County; Pinellas County; Osceola County; Citrus County; and many others.
- **Performance Evaluation** – He has provided the framework for many organizations transitioning into goal based performance evaluation systems or fully functional merit-based pay structures. He understands the importance of a well stratified, objective based review process and has been instrumental in assisting a number of large organizations transition from traditional systems into merit-based pay structures with minimal transitional costs and interruption.
- **Market Research** – He provided the basis for which market research was collected, analyzed, and review. He ensured that data collection procedures and methods were statistically reliable using his knowledge of statistics and overall market research.
- **Policy Development** – He has a thorough and firm understanding of policy development and has assisted many clients with implementing tailored policies and practices that reflect best practices.

Dr. Ling holds a Doctorate's Degree from Florida State University in Political Science and has taught courses addressing research methodology, statistical analysis, technological innovations, and political economy at various universities.



**Mr. David Bollenback – Project Director.** Mr. Bollenback is a Consultant with Evergreen. His academic background is in business management while his professional experience is in small business development, process management, and the collection and analysis of large, organizational data sets. He is experienced in the collection of both qualitative and quantitative



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data, and is well versed in the analysis of compensation data, benefits data, and performance management outcomes.

Mr. Bollenback's compensation and classification consulting work with Evergreen includes:

- Market Salary Surveys in which market data is collected and analyzed to determine the value of certain jobs within an organization as compared to its peers who compete for the same labor.
- Administering and utilizing job assessment tools to analyze the current state of a classification within an organization with respect to its pay, job description, and job title.
- Job Classification Descriptions in which organization's job descriptions were reviewed and adjusted to more accurately represent the duties of positions within the organization. He has revised numerous job descriptions to ensure current employees' duties are accurately represented within the organization.

Recent public sector projects in which Mr. Bollenback has been involved include: a Compensation Study for Florida Virtual School; a Compensation Survey for CareerSource Pinellas, FL; a Pay and Classification Study for Gulf County, FL; a Pay and Classification Study for the Brevard County Property Appraiser's Office, FL; a Job Classification Analysis for the City of St. Petersburg, FL; a Compensation Study for the Manatee County Clerk of the Circuit Court and Comptroller, FL; a Market Salary Survey for the Martin County Sheriff's Office, FL; Compensation and Classification Systems Consulting Services for the Collier County Sheriff's Office, FL; a Districtwide Job Classification and Compensation Study for the Escambia County School District, FL; Classification and Compensation Study Services for Hillsborough Community College, FL; a Classification and Compensation Study for Essex County, VA; a Pay and Classification Study for the Isle of Wight County, VA; a Classification and Compensation Study for James City County, VA; a Classification and Compensation Study for the Rivanna Water and Sewer Authority and the Rivanna Solid Waste Authority (Rivanna Authorities), VA; a Comprehensive Classification, Compensation, Performance Management, and Benefits Study for the City of Columbia, SC; a Classification and Compensation Study for the Town of Summerville, SC; a Classification and Compensation Study for the Richland Library, SC; a Classification and Compensation Study and Analysis for the City of Douglasville, GA; a Compensation and Benefits Study and Analysis for the City of Dahlonoga, GA; a Comprehensive Compensation and Classification Study for the City of Tybee Island, GA; a Compensation and Benefits Survey for Forsyth County, GA; a Comprehensive Classification and Compensation Study for the City of Garden City, GA; a Salary and Benefits Study for the City of Bloomington, IN; a Classification and Compensation Study for St. Charles County, CO; a Classification and Compensation Study and Analysis for the City of Broken Arrow, OK; a Compensation Study for the New Mexico Military Institute; a Classification and Compensation Pay Plan for the City of Amarillo, TX; and a City Management Compensation Survey for the Texas City Management Association.

Mr. Bollenback has an MBA and a Bachelor's Degree from Florida State University.



**Mr. Kyle Baker – Project Consultant.** Mr. Baker is a Senior Analyst at Evergreen Solutions. His background has been in the study of labor markets and education policy evaluations using techniques in econometric modeling which allow him to communicate and engage substantively through data and design.



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Mr. Baker's role with Evergreen has focused on compensation and classification studies utilizing market data. His primary responsibilities include:

- working closely with project teams and project managers in coordinating salary and benefit survey initiatives;
- evaluating market data from surveys, government agencies, and private sector databases to provide comprehensive reviews of compensation packages; and
- designing clear and concise reports and displays to communicate nuanced results.

Recent public sector projects that Mr. Baker has been involved with include: Classification and Compensation Study Services for Hillsborough Community College, FL; a Comprehensive Pay Plan Study for the City of Ormond Beach, FL; a Job Classification and Compensation Study for the City of Sunrise, FL; a Salary Survey for the City of Kissimmee, FL; a Compensation and Classification Study for the City of North Port, FL; a Classification and Compensation Study for the City of Sebring, FL; a Compensation Study for the City of North Miami Beach, FL; a Pay and Classification Study for Martin County, FL; a Classification and Compensation Study for the City of Zephyrhills, FL; a Classification and Compensation Study for the City of Lake City, FL; a Salary and Benefits Survey for the Seacoast Utility Authority, FL; a Classification and Compensation Study for the City of Ft. Myers, FL; a Salary Survey for the City of Holmes Beach, FL; a Comprehensive Pay Plan Study for the City of Plant City, FL; a Classification Study for the City of High Springs, FL; a Job Classification and Compensation Study for Escambia County, FL; Compensation Consulting Services for the Town of Longboat Key, FL; a Pay and Classification Study for the City of Holly Hill, FL; a Classification and Compensation Study for the City of Palm Beach Gardens, FL; a Compensation Study for Lake County, FL; a Salary Survey (Compensation Plan Update) for the Town of Ponce Inlet, FL; a Pay and Classification Study for the City of Chamblee, GA; a Job Classification and Compensation Study for the City of Salem, OR; a Classification and Compensation Study for San Miguel County, CO; a Classification and Compensation Study for Alleghany County and the City of Covington, VA; a Compensation and Classification Study for Union County, NC; a Classification and Compensation Study for the City of Goose Creek, SC; a Classification and Compensation Plan Update for the City of Temple, TX; a Classification and Compensation Study for the City of Gonzales, TX; a Classification and Compensation Study for the City of Pflugerville, TX; Job Classification, Salary Survey, Compensation Plan Study Services for the City of Duncanville, TX; a Pay and Classification Study for the City of Fredericksburg, TX; and Development of a Classification and Compensation Pay Plan for the City of Amarillo, TX.

Mr. Baker holds a Master of Science in Economics and a Bachelor's Degree in Economics and Political Science with a Minor in Mathematics from Florida State University.



A team of experienced analytical and clerical support staff will contribute to this study, as needed.



# **FLORIDA TELECOMMUNICATIONS RELAY, INC. PROPOSAL: COMPENSATION ANALYSIS PROJECT**

July 28, 2017

## **PREPARED FOR:**

James Forstall  
Executive Director  
Florida Telecommunications Relay, Inc.  
1820 E. Park Avenue, Suite 101  
Tallahassee, FL 32301  
(850) 270-2641  
jforstall@ftri.org

## **PREPARED BY:**

Tamu Lewis  
Compensation Consultant  
Culpepper and Associates, Inc.  
3780 Mansell Road, Suite T-40  
Alpharetta, GA 30022  
(678) 225-8381  
Tamu.Lewis@culpepper.com

## **OVERVIEW**

### **1. Objectives**

The objective of this project is to assist Florida Telecommunications Relay, Inc. ("Client" or "FTRI") with their competitive compensation analysis project. Culpepper and Associates, Inc. ("Culpepper") will provide analysis and recommendations based on findings, and create deliverables tailored to your organization's goals and objectives. Recommendations provided will consider external competitiveness within relevant labor markets and internal equity across the organization.

### **2. Overview**

As detailed through earlier needs assessment conversation, there are 10 employees working at the office location in Tallahassee, FL. There are 10 positions with 7 unique job titles and job descriptions; and, this project incorporates review/confirmation of each unique position's core responsibilities and requirements.

The following program components are included in this project.

- Base salary and short-term incentive/bonus (excludes specific sales and executive compensation plans)
- Base pay compensation structure
- Job title and levels audit

Areas of concern / market disconnect will be highlighted; and salary structure recommendations will be provided according to current market data, compensation philosophy, and other factors.

### 3. Firm Background

#### **About Culpepper and Associates**

Culpepper and Associates is a leading provider and trusted source for compensation survey market data and consulting services. For over 35 years, organizations have relied on Culpepper to help benchmark and design competitive and effective compensation programs. Culpepper is an independent entity.

Our experienced compensation consultants and analysts work closely with you at every step in the process to assess, design, and implement solutions customized for your organization. We are flexible, responsive, and within reach to help you achieve your goals. Many of our consulting clients are mid-size organizations employing up to 1,000 people, so we don't use a "one-size-fits-all" approach; we will tailor solutions to fit Modernizing Medicine's unique mission, operating model, and culture.

### 4. Project Team

#### **Tamu Lewis, M.B.A., CCP, CBP, Lead Consultant**

Tamu has worked on various types of strategic projects including compensation strategy and program development, performance management, succession planning, career pathing, training, work force strategy, and competency development. She has over 23 years of work experience, including 19 years of human resources consulting experience focusing in compensation and performance management. Her work experience includes 7 years of SuccessFactors implementation and system administration.

Tamu earned a BS in Finance from the University of South Carolina and a MBA from the University of North Carolina at Chapel Hill. She is a Member of the Atlanta Area Compensation Association (AACA), WorldatWork and the Society for Human Resource Management (SHRM). She has earned the following certifications: Certified Compensation Professional (CCP), Certified Benefits Professional (CBP), Professional in Human Resources (PHR), and Certified Career Coach.

#### **Stacey Morgan, MA, CCP, GRP, Compensation Consultant**

Stacey Morgan has been at Culpepper for over 13 years, serving as data analyst, compensation team manager, special projects coordinator, compensation consultant, and currently serves as the Director of Compensation Consulting.

Prior HR experience includes recruiting, training and development, and university relations. Stacey received a BA in Psychology and Communications from the University of Iowa and a Master's in Human Resource Development from Clemson University. She currently holds certifications through WorldatWork as both a Certified Compensation Professional (CCP) and Global Remuneration Professional (GRP), and has held a director position on the board of the Atlanta Area Compensation Association (AACA) for the past four years.

**Eric Hurst, Ph.D., Lead Analyst**

Eric Hurst is the Director of Data Analytics for Culpepper and Associates, where he conducts high-level analysis and statistical modeling of survey data. He also creates custom report solutions and serves as lead analyst for Culpepper Consulting projects.

Eric received his Ph.D. from Georgia State University. He has presented quantitative research at national conferences and has taught empirical methods at both Georgia State University and the Georgia Institute of Technology.

**5. Project Work Plan**

We have developed our work plan using a menu format that breaks out fees by project step so that we can discuss them with you to assure that we are on target with your needs and expectations. This work plan reflects our proposed scope of work for consulting services. We would be happy to discuss the proposed work steps with you to identify any changes or modifications that may be appropriate.

Project Step	Timeline	Estimated Fees
<p><b>1. Data Collection and Review</b></p> <ul style="list-style-type: none"> <li>▪ Culpepper will work with Client to confirm specific needs to be addressed, key compensation goals for the organization, and satisfy project data requirements.</li> <li>▪ We will build a comprehensive understanding of the Client's job hierarchy and unique roles through a combination of interviews (if needed) with selected members of the Client organization and a review of existing information including organization charts, job descriptions, completed job matching questionnaires, employee data, and scope information.</li> <li>▪ A job matching questionnaire will be provided to Client to document core responsibilities, requirements, and other pertinent information of jobs missing current descriptions.</li> <li>▪ Research will be done on competitive climate, turnover, and relevant labor markets. This includes the definition of a compensation philosophy as a framework for the project. Note: Steps 1 and 2 will have overlap.</li> </ul>	1 week	\$1,250



Project Step	Timeline	Estimated Fees
<p><b>2. Market Competitiveness Analysis</b></p> <ul style="list-style-type: none"> <li>▪ Once data matches are validated, we will begin the analysis of Client compensation against relevant external markets, as defined in Step 1.</li> <li>▪ In addition to Culpepper compensation surveys*, we will analyze up to 2 additional surveys purchased by Client (if needed) and align matches to Culpepper job codes to perform side-by-side comparison of data from all sources.</li> <li>▪ We will review the current market position with the Client, highlight areas of concern (including matching issues and leveling inconsistencies), and select benchmarks to include in salary structure development.</li> <li>▪ Client is required to give final approval of all benchmark codes and relevant pay factors to be included before Step 3 begins.</li> </ul>	1 week	\$2,450
<p><b>3. Program Analysis/Recommendations</b></p> <ul style="list-style-type: none"> <li>▪ Using market benchmarks, stated compensation philosophy, and relevant labor market data, we will develop a salary structure to assist with compensation administration.</li> <li>▪ Internal equity, reporting structure, career progression, geographic location and other Client considerations will then be examined to ensure pay guidelines are externally competitive and internally equitable.</li> <li>▪ Culpepper will collaborate with Client to evaluate ("slot") non-benchmark jobs into pay levels using defined compensable factors.</li> <li>▪ Culpepper will prepare and present a final report summarizing all project steps, findings and recommendations</li> </ul>	1 week	\$2,295
<b>Total Fees</b>		\$5,995

\*Data included in fees above:

- **Culpepper Small Business Compensation Survey Subscription License:** One-year subscription license and online access to Culpepper Small Business Compensation Survey Solution. Culpepper consultant will use survey databases to complete project objectives, including completing survey participation requirements on behalf of Client. This subscription will give the Client access to our compensation survey database and cloud reporting tools. The Client will have access to current data throughout the year, an unlimited number of customizable reports and an unlimited number of employee user licenses. This subscription includes the support and service of a dedicated Culpepper Compensation Survey Consultant to help the Client get the most out of our compensation surveys.

## 6. Costs Associated

Consulting Fees are based on our best estimate of the time and level of consulting required to deliver results. The estimate below will be total cost incurred, unless there is a mutually agreed upon change in scope, or additional services (below) are selected.

Not quoted in the fees above:

- Cost for Client purchase of additional survey sources, if desired.
- Management training or presentation of compensation program guide to individuals excluded from final report presentation.
- Training, presentations, and other solutions requiring on-site services will incur additional fees of \$2,500 USD per day plus travel expenses billed at actual cost.

Total Cost for Consulting Services    \$5,995 USD

*NOTE: The above quote for services expires 30 days from date of proposal.*

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Page: 1  
April 10, 2018  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 5,174.64	3,967.50	0.00	0.00	-5,174.64	<u>\$3,967.50</u>

5507  
Audited By [Signature] 4/10/2018  
Approved By [Signature] 4/10/18

att# 24465 [Signature]

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

Page: 1  
 April 10, 2018  
 Account No: 199-07090  
 Invoice No: 471175

GENERAL MATTERS

Fees

				Hours	
03/05/2018	RJT	Review of pending issues, including A. Roberts issue.		1.80	
03/06/2018	RJT	Review and research on A. Roberts issue.		2.00	
03/08/2018	RJT	Further review of A. Roberts issue; review pending issues and prepare for meeting		1.30	
03/09/2018	RJT	Meet with J. Forstall; follow up on pending issues		1.50	
03/19/2018	RJT	Review draft letter to A. Roberts and research issues.		1.70	
03/21/2018	RJT	Suggest revisions to A. Roberts letter; multiple emails with J. Forstall		1.50	
03/26/2018	RJT	Review correspondence from J. Forstall and suggest revisions; review PSC's Order and inform Board of need to approve health insurance changes and cover letter to PSC Staff		2.50	
03/27/2018	RJT	Review and respond to multiple emails concerning health insurance issue.		1.50	
03/29/2018	RJT	Review pending issues and telephone discussion with J. Forstall.		1.50	
03/30/2018	RJT	Review of pending issues		1.00	
03/31/2018	RJT	Rob Telfer 12 hours	\$3,000.00		
		Rob Telfer 4.3 hours @ \$225	967.50		
		TOTAL	\$3,967.50		
		For Current Services Rendered		16.30	3,967.50
		Total Current Work			3,967.50
		Previous Balance			\$5,174.64

Payments

03/16/2018		Payment Received, Thank You.			-5,174.64
		Balance Due			<u>\$3,967.50</u>
		Please Remit			<u>\$3,967.50</u>

GENERAL MATTERS

Advances

02/14/2018	OTHER FLORIDA DEPARTMENT OF STATE - MEETING NOTICE	59.64
	OTHER	59.64
	Total Advances	<u>59.64</u>
	Total Current Work	5,174.64
	Previous Balance	\$3,000.00

Payments

02/14/2018	Payment Received, Thank You.	-3,000.00
	Balance Due	<u>\$5,174.64</u>
	Please Remit	<u>\$5,174.64</u>

5509  
 FAB  
 Audited By [Signature] Date 3/14/2018  
 Approved By [Signature] Date 3/14/18  
 PAID  
 Chk # 24394 [Signature]

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

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Page: 1  
 March 08, 2018  
 Account No: 199-07090  
 Invoice No: 470628

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

			Hours
02/01/2018	RJT	Review materials and prepare for meeting with J. Forstall.	0.70
02/02/2018	RJT	Meet with J. Forstall to discuss pending issues.	1.50
02/05/2018	RJT	Follow-up concerning any current legislative issues impacting FTRI, including interpreter legislation	1.00
02/07/2018	RJT	Further review of pending matters; prepare minutes from past board meeting.	1.80
02/08/2018	RJT	Review of board minutes and preparation for board meeting	1.00
02/12/2018	RJT	Review board packet for upcoming meeting; review and send out draft minutes to board.	1.50
02/16/2018	WPD	Review meeting materials.	0.30
	RJT	Prepare for board meeting	1.70
02/19/2018	WPD	Attend Board meeting.	1.50
	WPD	Conference with Telfer re employee matter.	0.20
	RJT	Attend board meeting; follow-up review and correspondence concerning correspondence to PSC staff accompanying quarterly financials and propriety of terminating employee after arrest	4.00
02/20/2018	RJT	Review additional issues and correspondence concerning terminating employee	1.50
02/21/2018	RJT	Additional review of issues concerning termination of employee for arrest	0.70
02/22/2018	RJT	Meet with J. Forstall and review personnel policy	1.80
02/23/2018	RJT	Review additional issues discussed with J. Forstall	1.20
02/28/2018	RJT	Review of employee termination issue	1.00
	RJT	1-12 hours \$3,000.00	
		9.4 hours @ \$225.00 <u>2,115.00</u>	
		Total \$5,115.00	
		For Current Services Rendered	21.40
			5,115.00

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2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

Page: 1  
February 06, 2018  
Account No: 199-07090  
Invoice No: 468717

GENERAL MATTERS

Fees

			Hours	
01/02/2018	RJT	Review of pending matters	1.00	
01/04/2018	RJT	E-mails with J. Forstall re Cap-Tel billing issue.	0.30	
01/10/2018	RJT	Review pending issues and respond to budget question from J. Forstall	1.00	
01/19/2018	RJT	Review pending issues	1.00	
01/23/2018	RJT	Further review of pending matters and email with J. Forstall.	1.50	
01/30/2018	RJT	Exchange emails with J. Forstall re pending issues.	0.50	
01/31/2018	RJT	Follow-up emails with J. Forstall re pending issues.	0.50	
		For Current Services Rendered	5.80	<u>3,000.00</u>
		Total Current Work		3,000.00
		Previous Balance		\$3,000.00

Payments

01/12/2018		Payment Received, Thank You.		-3,000.00
		Balance Due		<u>\$3,000.00</u>
		Please Remit		<u>\$3,000.00</u>

5507  
Audited By [Signature] Date 2/9/2018  
Approved By [Signature] Date 2/9/18

**PAID**  
CREF 24319

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THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

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1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

GENERAL MATTERS

Page: 1  
January 04, 2018

Account No: 199-07090  
Invoice No: 467973

Fees

			Hours	
12/01/2017	RJT	Exchange emails with J. Forstall re possible ways to meet with Commissioners, and status of new board members.	1.00	
12/05/2017	RJT	Correspond with potential new board member from Frontier; multiple emails to J. Forstall re -same.	1.30	
12/06/2017	RJT	Follow-up with J. Forstall re pending issues.	0.50	
12/18/2017	RJT	Review of pending issues and discussion of internal affairs agenda	2.00	
12/19/2017	RJT	Additional review and emails with J. Forstall re pending issues	1.30	
		For Current Services Rendered	6.10	3,000.00
		Total Current Work		3,000.00
		Previous Balance		\$3,877.50

Payments

12/18/2017	Payment Received, Thank You.	-3,877.50
	Balance Due	<u>\$3,000.00</u>
	Please Remit	<u>\$3,000.00</u>

5507 Audited By [Signature] Date 1/8/2018  
Approved By [Signature] Date 1/8/18

**PAID**  
[Signature]  
01/24/18

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MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
December 06, 2017  
Account No: 199

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 5,442.50	3,877.50	0.00	0.00	-5,442.50	<u>\$3,877.50</u>

*MSB* Audited By *MSB* Date 12/8/2017  
Approved By *J* Date 12/8/17

5517

cl# 24183 *MSB*

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Page: 1  
November 10, 2017  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 3,029.54	5,407.50	0.00	35.00	-3,029.54	<u>\$5,442.50</u>

Audited By BA Date 11/17/2017  
Approved By [Signature] Date 11/17/17

5507

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Clt 24126

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THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Page: 1  
 November 10, 2017  
 Account No: 199-07090  
 Invoice No: 467224

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

			Hours	
10/02/2017	RJT	Review of current issues	1.50	
10/10/2017	RJT	Review of current issues and items necessary for annual meeting	1.80	
10/11/2017	RJT	Additional review of pending issues and preparation of materials for annual meeting	2.50	
10/12/2017	RJT	Review current issues and prepare for annual meeting	1.70	
10/13/2017	RJT	Revise materials for annual meeting	1.00	
10/17/2017	RJT	Online research concerning FTRI members for notice of annual meeting.	1.20	
10/18/2017	RJT	Prepare / revise: notice of annual meeting; proxy; and member list.	1.50	
10/19/2017	RJT	Further revision to materials for annual meeting	1.70	
10/20/2017	RJT	Further preparation of annual meeting materials; multiple emails with J. Forstall and T. McCabe	2.30	
10/23/2017	RJT	Continued review and research for annual meeting.	1.70	
10/24/2017	RJT	Multiple emails with J. Forstall and T. McCabe re annual meeting; discussion with Windstream representative re notice for annual meeting and potential board replacement; finalize and mail out notice of annual meeting, proxy, etc.	2.20	
10/25/2017	RJT	Revise matters for annual meeting.	1.30	
10/26/2017	RJT	Continued review and research for annual meeting.	0.60	
10/27/2017	RJT	Review of matters for annual meeting.	0.70	
10/31/2017	RJT	Review of matters in advance of TASA and board/annual meetings.	1.00	
	RJT	Rob Telfer 0-12 hours	\$3,000.00	
	RJT	Rob Telfer 10.7 hours @ \$225.00	<u>2,407.50</u>	
		TOTAL	\$5,407.50	
		For Current Services Rendered	22.70	<u>5,407.50</u>

GENERAL MATTERS

Timekeeper	Recapitulation		
	Hours	Rate	Total
ROB TELFER	9.10	\$238.21	\$2,167.73
ROB TELFER	12.30	238.22	2,930.07
ROB TELFER	1.30	238.23	309.70

Advances

11/09/2017	OTHER FLORIDA DEPARTMENT OF STATE - FAR PUBLICATION-NOTICE OF MEETING	35.00
	OTHER	35.00
	Total Advances	35.00
	Total Current Work	5,442.50
	Previous Balance	\$3,029.54

Payments

10/12/2017	Payment Received, Thank You.	-3,029.54
	Balance Due	<u>\$5,442.50</u>
	Please Remit	<u>\$5,442.50</u>

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 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

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FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Page: 1  
 October 04, 2017  
 Account No: 199-0709C  
 Statement No: 466533

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

			Hours	
09/01/2017	RJT	Review staff recommendation on Littlewood protest of budget and discuss with FTRI	2.50	
09/05/2017	RJT	Follow-up review of issues concerning Littlewood protest and discussion with FTRI	2.00	
09/06/2017	RJT	Review staff recommendation on Littlewood protest of budget and discuss with FTRI; prepare for agenda conference	2.50	
09/07/2017	RJT	Prepare for and attend agenda conference concerning Littlewood protest	3.50	
09/08/2017	RJT	Provide update on agenda conference and final order to FTRI	0.70	
09/25/2017	RJT	Review of pending issues	1.00	
		For Current Services Rendered	12.20	3,000.00

Advances

09/26/2017	FAR PUBLICATION-NOTICE OF MEETING - FLORIDA DEPARTMENT OF STATE	29.54
	OTHER	29.54
	Total Advances	29.54
	Total Current Work	3,029.54
	Previous Balance	\$5,459.26

**PAID**  
 OCT 24 016

Payments

09/19/2017	Payment Received, Thank You.	-5,459.26
	Balance Due	\$3,029.54
	Please Remit	\$3,029.54

Audited By [Signature] Date 10/6/2017  
 Approved By [Signature] Date 10/6/17  
 5507

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 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
October 04, 2017  
Account No: 199

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 5,459.26	3,000.00	0.00	29.54	-5,459.26	<u>\$3,029.54</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

RECEIVED SEP 13 2017

Page: 1  
September 06, 2017  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS					
4,102.50	5,430.00	0.00	29.26	-4,102.50	<u>\$5,459.26</u>

Audited By: *[Signature]* Date: 9/13/2017

Approved By: *[Signature]* Date: 9/18/17

GL = 5507

JA  
9/13/17

PAID  
Chk 23942

*[Handwritten mark]*

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

Page: 1  
 September 06, 2017  
 Account No: 199-07090  
 Statement No: 46600

GENERAL MATTERS

Fees

			Hours	
08/04/2017	RJT	Review of pending issues; review of email concerning public depositor issue and research on that issue.	1.60	
08/07/2017	RJT	Review of pending issues and preparation for upcoming board meeting; review and preparation of past board minutes	1.50	
08/08/2017	RJT	Additional review of public depositor issue; prepare and send drafts of past board minutes to FTRI Board.	1.80	
08/10/2017	RJT	Review of pending issues and preparation for upcoming board meeting	1.70	
08/11/2017	RJT	Prepare for board meeting and additional review of public depositor issue.	2.00	
08/14/2017	RJT	Prepare for and attend board meeting.	3.50	
08/18/2017	RJT	Review citizen's protest/request for reconsideration; legal research on same; send email to J. Forstall and T. McCabe with analysis on how the PSC might handle the protest.	2.30	
08/21/2017	RJT	Continued review of motion for reconsideration of PSC Order; review PSC staff's response; discuss with J. Forstall and T. McCabe	1.30	
08/23/2017	RJT	Review of pending issues and continued review of public depositor issue	1.20	
08/25/2017	RJT	Review of pending issues and continued review of public depositor issue	2.00	
08/29/2017	RJT	Review of pending issues; review PSC Staff's Request for Change to Commission Conference re Littlewood protest; discuss with J. Forstall and T. McCabe	1.90	
08/30/2017	RJT	Follow-up correspondence with FTRI concerning agenda conference re Littlewood protest.	1.00	
08/31/2017	RJT	Follow-up with FTRI concerning the Littlewood protest.	1.00	
	RJT	Rob Telfer 0-12 hours \$3,000.00		
	RJT	Rob Telfer 10.8 @ \$225.00 <u>2,430.00</u>		
	TOTAL	\$5,430.00		
	For Current Services Rendered		<u>22.80</u>	<u>5,430.00</u>



GENERAL MATTERS

Advances

08/15/2017	FAR PUBLICATION/NOTICE OF MEETING - FLORIDA DEPARTMENT OF STATE	29.26
	OTHER	29.26
	Total Advances	<u>29.26</u>
	Total Current Work	5,459.26
	Previous Balance	\$4,102.50

Payments

08/11/2017	Payment Received, Thank You.	-4,102.50
	Balance Due	<u>\$5,459.26</u>
	Please Remit	<u>\$5,459.26</u>

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

Page: 1  
 August 03, 2017

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Account No: 199-07090  
 Statement No: 465481

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

				Hours	
07/05/2017	RJT	Review and analyze Staff Recommendation		1.50	
07/06/2017	RJT	Additional review of Staff Recommendation; prepare for meeting with FTRI		1.20	
07/07/2017	RJT	Meet with J. Forstall and B. Bascom; discussion of ongoing issues and upcoming agenda conference re - budget		1.80	
07/10/2017	RJT	Further review of Staff Recommendation and related correspondence.		0.70	
07/11/2017	RJT	Further review of Staff Recommendation and preparation for agenda conference.		1.00	
07/12/2017	RJT	Prepare for Agenda Conference; multiple emails with J. Forstall re preparation.		1.60	
07/13/2017	RJT	Prepare for and attend agenda conference; follow-up emails to FTRI.		3.00	
07/14/2017	RJT	Follow-up emails with FTRI concerning process after PSC's decision on budget; correspondence with board chair concerning additional issues.		1.20	
07/17/2017	RJT	Review of revised budget and prepare revised agreement for representation.		1.00	
07/21/2017	RJT	Prepare revised legal representation agreement.		0.50	
07/24/2017	RJT	Preparation of revised fee agreement.		0.50	
07/25/2017	RJT	Further revision of fee agreement; prepare and send minutes of past board meetings to J. Forstall		1.00	
07/26/2017	RJT	Review order on budget; send to J. Forstall; revise and send proposed fee agreement to J. Forstall		1.40	
07/27/2017	RJT	Review of pending issues; send revised fee agreement to J. Forstall		0.50	
07/31/2017	RJT	Rob Telfer 0-12 hours	\$3,000.00		
		Rob Telfer 4.9 hours x \$225.00	<u>1,102.50</u>		
		TOTAL	\$4,102.50		
		For Current Services Rendered		<u>16.90</u>	<u>4,102.50</u>

ELECOMMUNICATIONS RELAY, INC.

Page: 2  
August 03, 2017  
Account No: 199-07090  
Statement No: 465481

GENERAL MATTERS

	Total Current Work	4,102.50
	Previous Balance	\$6,000.00
	<u>Payments</u>	
07/13/2017	Payment Received, Thank You.	-6,000.00
	Balance Due	<u>\$4,102.50</u>
	Please Remit	<u>\$4,102.50</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
August 03, 2017

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	4,102.50	0.00	0.00	-6,000.00	<u>\$4,102.50</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

Page: 1  
 July 03, 2017  
 Account No: 199-07090  
 Statement No: 464776

GENERAL MATTERS

Fees

		Hours	
06/30/2017	RJT Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.		
	For Current Services Rendered	50.00	5,969.34

Recapitulation

<u>Timekeeper</u>	<u>Hours</u>	<u>Rate</u>	<u>Total</u>
ROB TELFER	47.50	\$119.39	\$5,670.84
ROB TELFER	2.50	119.40	298.50

Advances

OTHER	30.66
Total Advances	30.66
Total Current Work	6,000.00
Previous Balance	\$6,000.00

Payments

06/12/2017	Payment Received, Thank You.	-6,000.00
	Balance Due	\$6,000.00
	Please Remit	\$6,000.00

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
July 03, 2017  
Account No: 199

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	5,969.34	0.00	30.66	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

Page: 1  
 June 01, 2017

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Account No: 199-07090  
 Statement No: 464214

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

		Hours
05/31/2017	RJT Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities. For Current Services Rendered	<u>5,972.42</u>

Recapitulation

<u>Timekeeper</u>	<u>Hours</u>	<u>Rate</u>	<u>Total</u>
ROB TELFER	0.00	\$0.00	\$5,972.42

Advances

05/31/2017	FAR PUBLICATION-NOTICE OF MEETING - FLORIDA DEPARTMENT OF STATE	27.58
	OTHER	<u>27.58</u>
	Total Advances	<u>27.58</u>
	Total Current Work	6,000.00
	Previous Balance	\$6,000.00

Payments

05/12/2017	Payment Received, Thank You.	-6,000.00
	Balance Due	<u>\$6,000.00</u>
	Please Remit	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
June 01, 2017

Account No: 199

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	5,972.42	0.00	27.58	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.



MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Page: 1  
 May 02, 2017  
 Account No: 199-07090  
 Statement No: 463744

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

		Hours	
04/30/2017	RJT Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.		
	For Current Services Rendered	46.70	6,000.00
	Total Current Work		6,000.00
	Previous Balance		\$6,000.00

Payments

04/11/2017	Payment Received, Thank You.		-6,000.00
	Balance Due		\$6,000.00
	Please Remit		\$6,000.00

Audited By [Signature] Date 5/4/2017

Approved By [Signature] Date 5/4/17

5507

6,000.00

Professional Services

JA  
 5/2/17  
 [Signature]

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

Page: 1  
May 02, 2017

Account No: 199

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	6,000.00	0.00	0.00	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

Page: 1  
 April 03, 2017

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Account No: 199-07090  
 Statement No: 462328

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

		Hours	
03/31/2017	RJT Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.		
	For Current Services Rendered	32.60	5,970.18

Advances

03/22/2017	FAR PUBLICATION NOTICE OF MEETING - FLORIDA DEPARTMENT OF STATE		29.82
	OTHER		29.82
	Total Advances		29.82
	Total Current Work		6,000.00
	Previous Balance		\$6,000.00

Payments

03/13/2017	Payment Received, Thank You.		-6,000.00
	Balance Due		\$6,000.00
	Please Remit		\$6,000.00

Audited By [Signature] Date 4/6/2017

Approved By [Signature] Date 4/6/17

5507                      6,000.00

JA  
 4/6/17  
 [Signature]

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Page: 1  
April 03, 2017  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	5,970.18	0.00	29.82	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

GENERAL MATTERS

Page: 1  
March 03, 2017  
Account No: 199-07090  
Statement No: 461842

Fees

02/28/2017	RJT	Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.	
		For Current Services Rendered	6,000.00
		Total Current Work	6,000.00
		Previous Balance	\$6,000.00

Payments

02/13/2017		Payment Received, Thank You.	-6,000.00
		Balance Due	<u>\$6,000.00</u>
		Please Remit	<u>\$6,000.00</u>

Audited By [Signature] Date 3/7/2017

Approved By [Signature] Date 3/7/17

JA  
3/8/17  
[Signature]

5507

6,000.00

Professional services for February, 2017

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Attn: JAMES FORSTALL

Page: 1  
March 03, 2017  
Account No: 199

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	6,000.00	0.00	0.00	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
 2618 CENTENNIAL PLACE  
 TALLAHASSEE, FLORIDA 32308  
 TELEPHONE (850)222-0720  
 E.I.N. 59-2921100

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FLORIDA TELECOMMUNICATIONS RELAY, INC.  
 1820 E. PARK AVENUE  
 SUITE 101  
 TALLAHASSEE, FL 32301

Page: February 03, 2017  
 Account No: 199-0709  
 Statement No: 46136

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

		Hours	
01/31/2017	RJT Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.		
	For Current Services Rendered	34.40	5,968.50

Advances

01/31/2017	FAR PUBLICATION / NOTICE OF MEETING - FLORIDA DEPARTMENT OF STATE		31.50
	OTHER		31.50
	Total Advances		31.50
	Total Current Work		6,000.00
	Previous Balance		\$6,000.00

Payments

01/12/2017	Payment Received, Thank You.		-6,000.00
	Balance Due		\$6,000.00
	Please Remit		\$6,000.00

Audited By [Signature] Date 2/6/2017

Approved By [Signature] Date 2/6/17

5507

6000.00

Professional Service

JA  
2/6/17  
[Signature]

ALL INVOICES DUE UPON RECEIPT.  
 THANK YOU FOR YOUR PROMPT PAYMENT.

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Page: 1  
February 03, 2017  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	5,968.50	0.00	31.50	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.



MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
SUITE 101  
TALLAHASSEE, FL 32301

Page: 1  
January 04, 2017  
Account No: 199-07090  
Statement No: 460718

Attn: JAMES FORSTALL

GENERAL MATTERS

Fees

Hours

12/30/2016	RJT	Professional services including review and preparation of correspondence; review of minutes; attendance at meeting; drafting of documents; review and modification of documents; communications with PSC and monitoring of PSC and legislative activities.		
		For Current Services Rendered	15.20	6,000.00
		Total Current Work		6,000.00
		Previous Balance		\$6,000.00

Payments

12/19/2016		Payment Received, Thank You.		-6,000.00
		Balance Due		<u>\$6,000.00</u>
		Please Remit		<u>\$6,000.00</u>

Audited By [Signature] Date 1/9/2017  
 Approved By [Signature] Date 1/23/17  
 5507 6,000.00

Professional Services Dec, 2016

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

JA  
1/16/17  
[Signature]

MESSER CAPARELLO, P.A.  
2618 CENTENNIAL PLACE  
TALLAHASSEE, FLORIDA 32308  
TELEPHONE (850)222-0720  
E.I.N. 59-2921100

FLORIDA TELECOMMUNICATIONS RELAY, INC.  
1820 E. PARK AVENUE  
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TALLAHASSEE, FL 32301

Page: 1  
January 04, 2017  
Account No: 199

Attn: JAMES FORSTALL

PLEASE INCLUDE THIS PAGE WITH PAYMENT

Previous Balance	Fees	Expenses	Advances	Payments	Balance
199-07090 GENERAL MATTERS 6,000.00	6,000.00	0.00	0.00	-6,000.00	<u>\$6,000.00</u>

ALL INVOICES DUE UPON RECEIPT.  
THANK YOU FOR YOUR PROMPT PAYMENT.

  
**MESSER CAPARELLO**  
Attorneys At Law  
*Strategically Positioned in Florida's Capital*

**Robert J. Telfer III**  
rtelfer@lawfla.com

July 27, 2017

**VIA E-MAIL** (jforstall@ftri.org)

James Forstall  
Florida Telecommunications Relay, Inc.  
1820 East Park Avenue, #101  
Tallahassee, FL 32301

Re: Legal Services

Dear James:

In light of the Public Service Commission's Order dated July 26, 2017, I believe it is necessary for Florida Telecommunications Relay, Inc. ("FTRI") and Messer Caparello, P.A. (the "Firm") to enter into a new contract for legal representation. Prior to the Order, FTRI paid our firm a flat fee retainer of \$72,000 per year, inclusive of costs, broken into 12 monthly payments.

Our firm would propose the following modified flat fee arrangement for your consideration.

I. For matters not involving formal dispute resolution (civil/criminal court, administrative litigation, mediation/arbitration), but including general representation of FTRI at board meetings, we would propose a flat rate of \$3,000 per month for up to 12 hours of legal services per month. The \$3,000 flat rate would be owed regardless of whether or not FTRI utilized the services offered. In the event that services for any month exceeded 12 hours, each additional hour would be billed at \$225 per hour. The areas of law included in the flat rate are:

- a. Representation at board meetings;
- b. Board governance issues;
- c. Business/contract review (employment contracts, general business contracts, RDC contracts, etc.);
- d. Employment issues;
- e. Legislative monitoring issues;
- f. RFP/procurement issues;
- g. Nonprofit issues;
- h. Tax issues;
- i. General representation issues not involving formal dispute resolution.

II. For matters involving formal dispute resolution (as addressed in section I above), the firm would bill FTRI at the hourly rate of the attorney handling the matter, with the exception that the maximum hourly rate would be capped at \$225 per hour. This would be over and above the flat rate. For example, in employment litigation cases, the firm normally has a more senior attorney handle the case, along with an associate attorney. The senior attorney's rate would be capped at \$225 per hour, while the associate's rate could range from \$175 to \$225 per hour.

The rates shall remain in effect subject to reasonable notice to FTRI of any proposed changes. Robert Telfer shall remain the firm's primary attorney to represent FTRI in its legal matters.

In addition to these hourly fees, FTRI agrees to be responsible for any actual costs and other direct charges incurred in the course of performing these legal services on your behalf. Such costs and charges can include photocopies, agency copy charges, overnight courier services, travel costs (airfare, mileage, and other direct travel expenses incurred on FTRI's behalf, as applicable), postage, and other such directly attributable costs. Generally, the firm advances on the client's behalf costs and seeks reimbursement through monthly billing, but in some situations it may request that such costs be directly billed to FTRI; for example, outside consultants or expert witnesses, transcript charges, or filing fees. All costs not directly billed to FTRI, as well as the firm's fee charges, will be invoiced on a monthly basis by a statement itemizing the respective fees and costs incurred for the preceding month. Payment will be due to the firm within 30 days of billing.

To confirm this representation and the above terms and conditions, please return the original of this letter with your signed acknowledgement below. On behalf of our firm, we appreciate the opportunity to be of assistance to you.

Sincerely,



Robert J. Telfer III

By:



ACKNOWLEDGMENT OF JAMES FORSTALL  
ON BEHALF OF FLORIDA TELECOMMUNICATIONS  
RELAY, INC.

# NTCA BENEFITS

THE RURAL BROADBAND ASSOCIATION

*Your Trusted Employee Benefits Partner*

## MEMO

DATE: September 1, 2017  
TO: Members Participating in the NTCA Group Health Program  
FROM: Shirley Bloomfield, Chief Executive Officer  
SUBJECT: 2018 Group Health Program (GHP) Rates

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The Group Health Program (GHP) Trust Committee has determined the medical, dental, life, long-term and short-term disability, and accident plan rates for 2018. The committee maintains a strong commitment to a comprehensive, long-term cost containment strategy. This includes the availability of a lower-cost PPO plan option in 2018—the Silver PPO. A summary of the committee's decisions follows, and more detailed information including rates for the new Silver PPO medical plan is enclosed.

**Medical Plan:** The 2018 rate increase ranges from 3.3% to 14.5%. This range reflects differences in rates by state and by plan, and the impact of plan design and regulatory-required changes. The Single A and Double AA Advantage plans will have an average 2% higher rate increase than other plans. The Platinum PPO and Gold PPO plans will also increase but approximately 2% lower than the average GHP rate increase for all plans. The average GHP medical rate increase is 9.9%. GHP Medicare rates will increase from a range of 5.8% to 11.9% depending on the medical plan and state. The average increase in GHP Medicare rates is 9.9%.

The trust committee has also approved a rate differential for members participating in the GHP Wellness Connections plan to recognize your commitment to employee well-being. The 2018 medical plan rate will be reduced by \$20 per month for each employee and by \$20 per month for each employee's spouse that completes the wellness plan requirements by November 30, 2017. Members qualify for this rate differential by meeting certain wellness plan criteria, including GHP Wellness Connections plan enrollment for three years. Additional information is enclosed for members on track to qualify for this rate differential in 2018.

**Dental Plan:** Platinum and Gold dental plan rates will increase by 7.0%.

**Group Life, Short-term Disability, Long-term Disability, Long-term Disability with waiver of contributions, Hi-limit Business Travel, 24-hour Accident Plans:** Good news—there will be no change in the rates for these plans.

We will notify your former employees that are billed directly by NTCA GHP about the 2018 rates for their medical, dental and/or life coverages. You will need to notify your former employees about 2018 costs for GHP coverages if the billings are included on your company invoices.

Please contact NTCA benefits resource specialists at (828) 281-9000 or your member relations manager if you have any questions about the 2018 rates, or to receive more information about GHP. On behalf of all of us at NTCA, we appreciate your commitment to the health and well-being of your employees through your participation in the GHP plans.

MAS: bff  
Attachments