



**Empowering a  
New Generation  
of Americans**

## **Board of Directors Meeting Package**

**Meeting #11**

**Tuesday, November 14, 2023**

**Join Zoom Meeting**

<https://us06web.zoom.us/j/84903878249?pwd=dFRsRGJYTWIKQ3Nrd2pYd3NwRUUpDdz09>

**Meeting ID:** 849 0387 8249

**Passcode:** 193610

### **Mission**









**Empowering immigrants and others to  
become self-sufficient, productive and  
civically engaged.**





**Board of Directors**  
Meeting Agenda  
Tuesday, November 14, 2023 | 4:00 PM – Zoom Meeting

Time	Item	Lead	Pgs	Action
4:00	<b>Call to Order / Roll Call</b>	Christina Paradowski Felina Furer		
4:05	<b>Chair Welcome</b> <ul style="list-style-type: none"> <li>Alexandra Palau, New Board Member</li> <li>Wells Fargo – Leo Toca</li> <li>Unity 4Kids Holiday Gifts</li> </ul>	Christina Paradowski		Information
4:15	<b>CEO Report</b>	Felipe Pinzon		Information
4:20	<b>Mission Moment: Citizenship</b>	Elizabeth Dorante & Magaly Alvarado		Information
4:35	<b>Finance</b> <ul style="list-style-type: none"> <li>IRS 990 Update</li> </ul>	Leonor Romero		Information
4:40	<b>Strategic Plan Final Plan</b>	Christina Paradowski and VeraCruz Advisory	5 - 67	Action
5:05	<b>Governance</b> <ul style="list-style-type: none"> <li>Bylaws Amendments</li> <li>Slate of Officers</li> <li>2024 Board Meetings</li> </ul>	Tony Abbate	68 – 89 90	Action Action Information
5:25	<b>Operations</b> <ul style="list-style-type: none"> <li>Employee Handbook</li> </ul>	Ingrid Ekblad	91 - 149	Action
5:35	<b>Public Policy &amp; Advocacy</b> <ul style="list-style-type: none"> <li>2024 Public Policy &amp; Advocacy Agenda</li> </ul>	Carolina Cardozo & Felipe Pinzon	150 - 151	Action
5:45	<b>Fund Development</b> <ul style="list-style-type: none"> <li>E-Summit Recap</li> <li>End of Year Campaign</li> </ul>	Shani Wilson		Information Information
5:55	<b>Consent Agenda</b> <ul style="list-style-type: none"> <li>Board Meeting Minutes (10/2023)</li> <li>Finance Committee Minutes (9/2023)</li> <li>August 2023 Financial Statements</li> <li>Governance Meetings Minutes (10/2023)</li> <li>PP&amp;A Minutes (9/2023 and 10/2023)</li> <li>Program Performance (August 2023)</li> </ul>	Christina Paradowski	152 - 187	Action
<b>Executive Session</b>				
6:00	<b>Adjourn</b>			

**18 Active Board members / 10 required for quorum and vote**

	A	B	C	D	E	F	G	H	I	J	K	L	M
<b>Board of Directors</b>													
2023													
<b>Board Members</b>	<b>Jan</b>	<b>Feb</b>	<b>Mar</b>	<b>April</b>	<b>May</b>	<b>June</b>	<b>July</b>	<b>August</b>	<b>Sept</b>	<b>Oct</b>	<b>Nov</b>	<b>Dec</b>	
ABBATE, Anthony (Tony)	P	P	P	E	P*	P			P	P			
ALVAREZ, Maritza	P	P	P	P	P	E			P	P			
ARGUELLO, Ana	A	A	A	A									
BARNARD, Maria	P	E	P	P	P	P			P	P			
BITTAR, Elsa	P	A	P	A	P	A			P	P			
CARDOZO, Carolina	P	P	P	P	P	P			P	P			
CUSHING, Giselle	P	P	P	P	P*	P			P	P			
ESPINOZA, Boris	P	P	A	E	P	P			P	A			
FRANCO, Lesli	P	P	A	A	A	P			P	E			
HERZ, Dan	P	P	P	P	P*	P			P	P			
NASSE, Jeffrey	P	P	E	E	P	P			P	E			
PARADOWSKI, Christina	P	P	P	P	P*	P			P	P			
PALAU, Alexandra													
REYES, Christian	P	P	A	A	P	P			E	A			
RIVERA, Francisco	P	P	E	P	P	P			P	P			
RODRIGUEZ, Ana	P	P	P	P	E	A			P	A			
RODRIGUEZ, Lisette	P	P	P	P	P	P			E	P			
RODRIGUEZ, Lucia	P	P	P	A	P	P			E	P			
SCHEVIS, Daniel	P	E	P	A	A	A							
STONE, Angie	P	P	P	P	P*	P			P	P			
<b>Total Board Members</b>	19	19	19	19	18	18			17	17	18		
<b>Present: P</b>	18	14	13	10	15	14			14	12			
<b>Excused: E</b>	0	2	2	3	1	1			3	2			
<b>Absent: A</b>	1	3	4	6	2	3			0	3			
<b>Board Members Present at the Meeting</b>	<b>94% Zoom</b>	<b>73% Zoom</b>	<b>68% Zoom</b>	<b>52% Zoom</b>	<b>83% Hybrid</b>	<b>77% Zoom</b>	<b>Summer Break</b>		<b>82% In Person</b>	<b>70% Zoom</b>	<b>Zoom</b>	<b>Zoom</b>	

	<p><b>Shani Wilson</b>, VP of Development</p> <p><a href="mailto:swilson@hispanicunity.org">swilson@hispanicunity.org</a></p> <p>754-260-0409</p>		<p><b>Leonor Romero</b>, Chief Financial Officer</p> <p><a href="mailto:lromero@hispanicunity.org">lromero@hispanicunity.org</a></p> <p>754-221-7976</p>
	<p><b>Elizabeth Dorante</b>, VP of Programs</p> <p><a href="mailto:edorante@hispanicunity.org">edorante@hispanicunity.org</a></p> <p>954-600-4318</p>		<p><b>Ingrid Ekblad</b>, Director of Operations</p> <p><a href="mailto:iekblad@hispanicunity.org">iekblad@hispanicunity.org</a></p> <p>954-907-1410</p>
	<p><b>Magaly Alvarado</b>, Director of Civic Engagement</p> <p><a href="mailto:malvarado@hispanicunity.org">malvarado@hispanicunity.org</a></p> <p>954-907-1354</p>		<p><b>Yonela Carusi</b>, Director of Education Department</p> <p><a href="mailto:ycarusi@hispanicunity.org">ycarusi@hispanicunity.org</a></p> <p>954-701-5232</p>
	<p><b>Katherin Gallego</b>, Marketing Director</p> <p><a href="mailto:kgallego@hispanicunity.org">kgallego@hispanicunity.org</a></p> <p>954-329-5262</p>		<p><b>Juliana Esguerra</b>, Director of Evaluation and Innovation</p> <p><a href="mailto:jesguerra@hispanicunity.org">jesguerra@hispanicunity.org</a></p> <p>954-639-2043</p>

	<p><b>Eduardo Pineda,</b> Director of Economic Development</p> <p><a href="mailto:epineda@hispanicunity.org">epineda@hispanicunity.org</a></p> <p>954-608-9259</p>		<p><b>Otayme "Otto" Valenzuela,</b> Associate Director of Public Policy &amp; Advocacy</p> <p><a href="mailto:ovalenzuela@hispanicunity.org">ovalenzuela@hispanicunity.org</a></p> <p>954-294-6054</p>
	<p><b>Felina Rosales- Furer,</b> Administrative Manager</p> <p><a href="mailto:ffurer@hispanicunity.org">ffurer@hispanicunity.org</a></p> <p>954-329-5968</p>		<p><b>Felipe Pinzon,</b> President &amp; CEO</p> <p><a href="mailto:fpinzon@hispanicunity.org">fpinzon@hispanicunity.org</a></p> <p>954-257-5473</p>

# Strategic Plan 2023

## Strategic Plan Executive Summary

### **The Organizational Vision**

Hispanic Unity of Florida (“HUF” or the “Organization”) envisions a future where every individual and family has the opportunity to achieve economic prosperity and well-being. HUF believes that this flourishing, deeply rooted in the principle of human dignity, will manifest in a multitude of ways, tailored to each person's circumstances. Central to this fundamental principle is the ability to thrive, supported by the key components of individual, family, and community well-being.

HUF’s mission is clear: to empower immigrants and others to become self-sufficient and civically engaged, thus increasing wealth and financial stability, and fostering a more equitable and prosperous society for all. HUF's dedication to this mission is unwavering and forms the foundation of the organization’s commitment to the community.

Through HUF’s programs and services, families become self-sufficient and achieve their American dream. For this reason, it is an organizational strategic imperative to ensure that access to vital HUF programs and services is readily available to all. The organization is now more proactive in identifying and addressing issues impacting clients, ensuring that their journey toward self-sufficiency is as seamless as possible. From this starting point, HUF is committed to addressing systemic issues by incorporating front-line insights to inform effective public policy and community advocacy, while continuously strengthening the internal organizational capacity to ensure a high standard of quality for those served. This proactive approach is central to HUF's mission of empowering individuals and families and fostering a more equitable and prosperous society for all.

As HUF embarked on its strategic planning journey, it recognized that further strengthening its internal organizational capacity was essential to achieving these long-term goals effectively and efficiently. This vision propels HUF forward in its mission to empower individuals and families, fostering a more equitable and prosperous society for all.

### **Strategic Plan Crafting**

The current Strategic Plan is intentionally focused on programs and advocacy since these two core HUF activities are effective and help address - and anticipate - changing area needs related to immigration. The current Strategic Plan (“Strategic Plan”, “SP” or “Plan”) represents a road map and implementation framework that leverages HUF's organizational differentiators while underscoring areas for strengthening in support of

achieving HUF's vision, the four (4) strategic goals ("Goals") and 16 objectives ("Objectives"). Utilizing both people and processes, the current Plan blends HUF's positioning, understanding the community needs, and collecting feedback while addressing various client populations and circumstances. Acting as both a direct service provider and a referral agency, HUF has unique insights gleaned from serving the area's needs while maintaining alignment with its vision and mission. The current planning built on the previous Strategic Plan's successes and learnings to leverage HUF's programmatic impact and to inform policy. By helping inform public policy, the HUF Board of Directors ("BOD" or "Board") and executive leadership team look to better address community needs and take a more proactive (or upstream) approach that benefits from years of effective direct service delivery and impactful programs.

The Strategic Planning process, including data gathering and community feedback, has reaffirmed HUF's important mission in serving the growing and diverse needs of the immigrant and broader community in Southeast Florida. This process included garnering multiple sources of feedback and obtaining streams of data from the Organization's staff<sup>1</sup>, Board, and community stakeholders<sup>2</sup>. There was also Board-staff intentionality in seeking the input of often 'unheard voices' or persons. This was accomplished by speaking to HUF clients<sup>3</sup>, a wide array of partner agencies and collaborators, and taking into account frank stakeholder feedback.

The Organization's strategic direction and vision are clear, and captured in several overarching themes, four (4) SP Goals and 16 Objectives that surfaced and were developed from the strategic planning process which began in January 2023, and was completed in October 2023.

In alignment with the Organizational mission, there were overarching strategic themes that can be described as:

- Encouraging Individual and Family Self-sufficiency and Increasing Wealth, Financial Stability and – Economic Mobility
- Increasing Access to HUF's Programs and Services
- Addressing Systemic Issues
- Strengthening Internal Organizational Capacity

Specific to the Strategic Planning process, four (4) Plan Goals emerged:

- 1) Respond to current and emerging community needs by increasing access to HUF's programs and services.
- 2) Expand income and wealth-building opportunities for working families.
- 3) Define and strengthen HUF's role in policy and advocacy.
- 4) Position HUF for growth while achieving operational excellence.

<sup>1</sup> See Staff Feedback Summary, Appendix D

<sup>2</sup> See Community Stakeholder Feedback Summary, Appendix C

<sup>3</sup> See Focus Groups Clientele Summary, Appendix B

Though ambitious, these Goals were the product of stakeholder input and include both the current work of HUF, and work yet to be done, and are further elaborated in the Objectives which include:

1. Ensure HUF's programs and services respond effectively to community needs and are accessible to those in need.
2. Strengthen workforce education in keeping with the market drivers.
3. Provide support and resources for current and/or aspiring homeowners and business owners.
4. Engage stakeholders systematically to discuss and address issues impacting working families in Southeast Florida.
5. Examine HUF's role in addressing Hispanic gaps in leadership positions.
6. Empower clients to be more civically engaged, and encourage staff, volunteers, and the Board of Directors to become advocates for HUF's clients.
7. Develop a comprehensive policy agenda.
8. Establish and strengthen strategic partnerships or working collaborations with other NFPs and area institutions and organizations (e.g., Broward College, county government, Chamber of Commerce, etc.) to strengthen programs and services and increase access.
9. Increase HUF's visibility in the community through intentional marketing efforts.
10. Build diverse funding opportunities to expand multi-year, unrestricted funds.
11. Grow the Board of Directors' capacity to fulfill their duties more effectively and strategically.
12. Create a dedicated Human Resources Department to manage the development and retention of HUF talent more effectively.
13. Enhance organizational infrastructure to improve efficiency and effectiveness.

As part of the iterative and collaborative strategic planning process, seven functional committees<sup>4</sup> developed targeted next steps ("Next Steps") for each of their assigned Objectives resulting in 50 more tactical and measurable steps. These Next Steps were presented by Board members and staff at the Board Retreat (in September 2023) and reviewed and prioritized. Each committee, without reducing the Next Steps, highlighted the immediate priorities.

With the four Goals, sixteen Objectives, and a prioritized list of the Next Steps the executive team and leadership met with managers and staff to develop a more detailed implementation plan.

The executive team and Board are committed to the Plan's thoughtful implementation and frequent evaluation. To monitor the implementation and success of the Plan, and to ensure that its strategic vision makes an Organization-wide impact, the staff is developing Key Performance Indicators that will serve as a scorecard to assist the Board in

<sup>4</sup> See Committee Lists Appendix H.



monitoring and supporting progress. In addition, the KPIs will be used to communicate more broadly with supporters and collaborators.

To assist in the planning and implementation, VeraCruz developed a financial-operating model (“Model”)<sup>5</sup>, which provides a meaningful way to forecast and plan for the long-term financial implications of the Strategic Plan as well as provide scenario analysis for new or expanded programs and service costs or revenues. The Model also allows for tracking and presenting some KPIs and provides informative financial information to the executive leadership and BOD.

## **Brief Context**

In the Fall of 2022, Felipe Pinzon, CEO of Hispanic Unity of Florida along with its leadership team and Board of Directors initiated a strategic planning process that would ensure the Organization’s “focus and work are inclusive and reflect the most pressing community needs.” [VeraCruz Advisory, LLC](#) (“VeraCruz” or “Consultants”)<sup>6</sup> was engaged to support the creation of a three-year strategic plan. The Plan development was initiated by obtaining feedback through a comprehensive, data-informed, and participatory process. Given the positive community feedback and its utility, special attention was given to the main findings of the [State of Hispanic and Immigrant Broward](#) report<sup>7</sup>, [HUF’s 2021 Annual Report](#), and the Organization’s current strategic plan, which was completed in 2016. The process was designed to garner external and internal stakeholder feedback while considering the existing capacity of the Organization as well as diverse opportunities to better serve growing community needs.

In January 2023, VeraCruz began collecting broad feedback from the Board and staff to understand the Organization’s current configuration and capacity, as well as the current service offerings in its three program areas<sup>8</sup> and over 30 services. In addition, dozens of stakeholder interviews, along with client feedback, provided a deeper understanding of the current and changing needs of the community and provided a rich context to the findings outlined in the *State of Hispanic and Immigrant Broward* report.

This participatory process revealed several critical insights into HUF’s unique standing in the community which guided the overall development of the Strategic Plan and leveraged organizational strengths.

- l) **HUF’s trusted standing in the community.** It was evident that HUF has earned the trust of the community served. This trust was based on solid results of helping

<sup>5</sup> Please See Financial-Operating Model Outline Appendix G.

<sup>6</sup> Please See VeraCruz Advisory Consultants Bios Appendix J.

<sup>7</sup> Please See Executive Summary of Report Appendix A.

<sup>8</sup> Education, Economic Development, and Civic Engagement.

people in the Greater Broward area (and parts of Miami-Dade County) and a positive reputation of responding to human needs and aspirations with meaningful, culturally appropriate programs. HUF's trusted reputation was evident and affirmed in conversations, surveys, and interviews with municipal-county, business, faith, non-profit, and other community leaders that held the Organization in high regard.

- II) **HUF's non-partisan position.** HUF's commitment to non-partisan approaches in advocating for the community and encouraging civic engagement was strongly perceived as a positive and distinct characteristic. The Organization was recognized for its objectivity and helping inform public policies and offering insights on immigration and immigrant matters.
- III) **HUF's effective operations.** A history of offering high-quality and highly responsive programs engendered confidence not only in the Organization but in its multiple programs and staff.
- IV) **HUF's successful leadership succession.** The thoughtful continuity of leadership and key personnel contributed to the positive reputation and ensured organizational continuity, reliability, and familiarity with key community stakeholders and issues.

## **Approach to Strategic Planning**

VeraCruz's approach to strategic planning is based on a disposition of 'seeking to understand' or listening first and recognizing the distinct features and culture of an organization. The final product is built upon a holistic perspective that incorporates accurate data analysis of all stakeholders' input, qualitative feedback as well as the financial-operational implications of the Plan Goals and Objectives.

The final aim is not to just memorialize a process or draft a Strategic Plan, but to provide a framework to generate adaptable solutions to growing immigration-related and human service needs in the region. In doing so, HUF's positive standing and identity were leveraged while strengthening some Organizational areas. The Strategic Planning process was iterative and took place over nine months of internal interactions with the Board, the Strategic Planning Committee, and seven<sup>9</sup> functional committees (i.e., working groups). This approach led to incorporating multiple data streams of both qualitative and quantitative information and providing analysis in ways directly relevant to HUF's Strategic Plan Goals and Objectives creation, adoption, implementation, and evaluation.

## **The Process**

- 1) **Data Collection:** To ensure broad feedback and participation, the Consultants met with the Board of Directors multiple times at the beginning of the engagement and updated them regularly throughout the process. Both through the ongoing

<sup>9</sup> Programs, Public Policy and Advocacy, Governance, Operations, Development, Marketing, and Finance.

communication-work of the Strategic Planning Committee and directly in meetings, the full Board was involved and kept informed of the Plan creation progress. Moreover, Board input and decisions were incorporated through both high-level and granular feedback to help guide the development of the data sets to address Organizational and community needs. The Board engagement was two-way and direct. Board members provided candid and critical insights, awareness of issues, and a stronger connection to pertinent community stakeholders.

In addition to the Board, the Consultants met with senior HUF leadership and staff multiple times to develop the list of community stakeholders, and to create a host of questions that could provide deeper insights into HUF's reputation, service outcomes, and the specific needs of the community. Given the recent, record volume of Hispanic and Haitian immigrants, and some non-traditional immigrant flows (e.g., from the Ukraine), obtaining current immigrant patterns/needs information was vital. In total, VeraCruz interviewed 24 community stakeholders from the public, private, nonprofit, and philanthropic sectors. The interviews were conducted either in-person, via Zoom, or by telephone, and ranged from 45-90 minutes depending on the disposition of the interviewee<sup>10</sup>.

Along with the community stakeholders VeraCruz integrated staff feedback gathered by the Organization during the Spring (2023) Staff retreat, as well as client feedback collected by HUF, and conducted follow-up interviews with several staff members. This follow-up with HUF's team members led to a better understanding of services impact, as well as offering their insights into program expansion, evolving (and growing) community needs, and operational capacity.

To assist with the overall development and implementation of the Strategic Plan, a financial-operational model ("Model") was developed to test scenarios for various Plan Goals and Objectives and to get a sense of their impact. The Model was developed utilizing existing programs and financial data, projected expansion of certain existing programs and services, and potential new programs that surfaced during the planning process.

- 2) **Data Analysis:** To ensure accuracy and understanding of the stakeholder feedback, and its proper context, much effort went into preparing focused Agendas and analyses ahead of Strategic Planning Committee and Board meetings. The facilitated meetings fostered collegial yet frank conversations about the information, findings, and analyses. This process ensured a thorough review and interpretation of the findings from Board surveys, stakeholder interviews, staff, and client input, etc.

<sup>10</sup> See more details in Community Stakeholder Feedback Summary Appendix C.

Board members, staff, and community stakeholders served selectively on the Strategic Planning Committee, the Programs and Advocacy Committee, and collectively on the seven (7) functional committees (Programs, Public Policy and Advocacy, Governance, Operations, Development, Marketing, and Finance). This intentional ‘sprinkling’ of Board and SPC members ensured there was ongoing communication between various groups and workstreams as well as helping to craft operationally viable Plan Goals and Objectives.

- 3) **Refinement:** As the process continued, the Strategic Planning Committee identified 4 broad Strategic Goals and 16 Objectives for the functional committees to review/modify as needed and to develop clear and measurable next steps. The seven functional committees submitted the next steps for the HUF leadership and the Strategic Planning Committee’s review prior to being reviewed by the full Board.

In September, during the annual Board of Directors retreat, the Board reviewed the strategic planning process’ 4 Goals, 16 Objectives, and 50 Next Steps with the purpose of providing further refinement, and providing leadership (with staff input), a synthesis, and prioritization of Next Steps.

The further refinement of Goals, Objectives, Next Steps, and use of the financial-operational model now provides a specific feel for some HUF areas on costs and revenue projections, as well as a functional Model to help with forecasting and scenario testing.

- 4) **Implementation:** A strategic plan is ultimately only as good as its implementation and, as a living document, it must be continually monitored to ensure any adjustments are made to meet changing needs or realities. In addition to staff engagement in developing concrete plans for implementation and specific next steps, a scorecard will be developed. This Key Performance Indicator’s (“KPI”) summary will provide feedback and a system for internal and Board reporting.

### **Key Stakeholder Selection, Participation, and Process Intentionality**

The success of any strategic planning process is predicated on having a broad representation of knowledgeable perspectives as well as active participation from all involved. Participants at every level require clear expectations, transparency of the process, and frequent checkpoints to test assumptions, respond to challenges, and discuss priorities.

The HUF Board of Directors assisted in the development of the original Request for Proposals (RFP), and subsequent preparatory meetings with VeraCruz to provide direct insights into HUF’s current operations and community needs. The governing body also

assisted in developing a list of 24 stakeholders from various sectors for interviews and participated in the strategic planning-focused Board retreat in September 2023. This retreat was structured to include the Organization's executive and staff to review and debate the draft Goals, Objectives, and Next Steps. In addition to making sure there was staff involvement (i.e., buy-in) - since it will be HUF staff who performs the bulk of Plan execution - the Organization's team shared numerous practical experiences and elements as Goals, Objectives, and Next Steps were developed.

Over the course of the process, HUF executive staff participated in weekly meetings with VeraCruz for planning purposes and helped organize the various committee agendas and functional committee tasks. In addition to this, they discussed and analyzed data, proposed Goals and Objectives, and went over the process's next steps. When needed, additional staff members were part of working groups and added program-service data and Next Step insights.

The Strategic Planning Committee ("SPC") consisting of select Board and staff members, played the principal role in developing the first set of Goals based on input from the Programs and Advocacy Committee ("P&AC"), the executive team, the Board survey, and other community stakeholders involved in the process. The SPC met four times beginning in March 2023 with the principal objective to help guide the process, process feedback and analyses, develop the specific goals and objectives, and - along with the functional committees - consider the next steps for implementation. The SPC's final Plan recommendations were ultimately submitted to the Board of Directors for formal approval.

The Programs and Advocacy Committee ("P&AC") played a central role in the expansion of programs and the role of public policy in HUF's previous Strategic Plan. Given the importance of this particular committee, VeraCruz met with them four times to assist in the development of their recommendations.

Functional committees, working groups, made up of Board members, staff, and community members, met at least once throughout the summer of 2023 to develop the next steps for the SP Objectives<sup>11</sup> assigned to them by the Strategic Planning Committee.

1. Public Policy and Advocacy Committee: Focused on Objectives 3.1-3.5
2. Programs Committee: Focused on Objectives 1.2, 2.1-3 & 4.1
3. Governance Committee: Focused on Objectives 1.3, 3.4, & 4.4
4. Operations Committee: Focused on Objectives 4.5-6
5. Development Committee: Focused on Objectives 4.3, 4.4
6. Finance Committee: Focused on Objective 4.3
7. Marketing Committee: Focused on Objective 4.2

<sup>11</sup> Listed in on pages 11-16.

All meetings were well attended and benefited from the executive team, committee members, consultant coordination, and robust discussions. Strategic Planning meetings were intentional, methodological, and memorialized to track and establish priorities as they arose and communicate what decisions were made during working sessions. Rather than limiting the process to the Strategic Planning Committee, broad input was incorporated from staff and stakeholders. Follow-up work between scheduled meetings provided data and additional direct input from staff as needed to reach the final set of four (4) Goals, and 16 Objectives outlined below.

### ***The Timeline***

- 1/10 – Initial HUF Executive Team Meeting with VeraCruz
- 2/10 – Board Survey
- 2/17 – HUF Staff retreat
- 2/21 – Board of Directors Meeting (Review of Process, Timeline and Survey Results)
- 2/23 – Stakeholder Interviews Started
- 03/09 – Strategic Planning Committee Meeting #1
- 04/05 – Programs and Advocacy Committee Meeting #1
- 04/06-30 – Clientele Listening Sessions
- 04/19 – HUF Staff Follow-up
- 04/23 – Stakeholder Interviews Finished
- 04/24 – Programs and Advocacy Committee Meeting #2
- 05/01 – Strategic Planning Committee Meeting #2
- 05/10 – Programs and Advocacy Committee Meeting #3
- 05/17 – Programs and Advocacy Committee Meeting #4
- 06/13 – Strategic Planning Committee Meeting #3
- 06/27 – Board of Directors Meeting (Presentation of Recommendations)
- 07-08 – Functional Committees Meetings:
  - 07/14 – Public Policy and Advocacy Committee Meeting
  - 08/03 – Programs Committee Meeting
  - 08/04 – Governance Committee Meeting
  - 08/09 – Marketing Committee Meeting
  - 08/17 – Finance Committee Meeting
  - 08/18 – Operations Committee Meeting
  - 08/24 – Development Committee Meeting
- 09/14 – Strategic Planning Committee Meeting #4
- 09/23 – Board of Directors Retreat (Review Goals, Objectives, and Next Steps)
- 10/25 – Strategic Planning Committee Meeting #5 (Final)
- 10/31 – Finalized Plan ready for Board Approval
- 11/14 – Board of Directors Review and Approval of Strategic Plan

## Detailed Elements of the HUF Strategic Plan

Below you will find the detailed outline of the four (4) Strategic Goals, the 16 Objectives that were developed by the Strategic Planning Committee, and the 50 Next Steps that were developed by the seven sub-committees and internally. The Next Steps were presented and discussed at the Board of Directors' Annual Retreat. The Board retreat discussion led to key themes (see below) that needed to be addressed in the Plan and helped guide the Next Steps and prioritization.

- 1) Respond to current and emerging community needs by increasing access to HUF's programs and services.
- 2) Expand Income and wealth-building opportunities for working families.
- 3) Define and strengthen HUF's role in Policy and Advocacy.
- 4) Position HUF for growth while achieving operational excellence.

## Goals, Objectives, and Next Steps

Goal # 1: Respond to current and emerging community needs by increasing access to HUF's programs and services.	
Objectives	Next Step
<b>1.1 Ensure HUF's programs and services effectively respond to the evolving needs of the community.</b>	1.1.1 Conduct continuous comprehensive community needs assessments to identify current and emerging needs.
	1.1.2 Streamline the evaluation of the effectiveness of programs and services.
	1.1.3 Identify opportunities to enhance and/or expand programs and services and explore innovative approaches to address emerging community needs.
	1.1.4 Assess the representation of the community within HUF's Board of Directors and staff.  (i.e., Bi-Annual/Annual review of data by the Board to better advise the Agency)
	1.1.5 Periodically assess programs and services to evaluate if current strategies are effectively addressing community needs.  (i.e., HUF's Board of Directors to analyze realignment of strategies)
<b>1.2 Increase community access to Programs and Services.</b>  <i>(this can be done through external collaborative relationships or by providing internal programs and services or both)</i>	1.2.1 Fine-tune HUF's Community needs assessments, research efforts, and data analysis to better target the Organization's service delivery strategies.
	1.2.2 Create a detailed strategy for geographic expansion, strengthening partnerships to attain it.
	1.2.3 Expand and strengthen HUF's outreach and marketing efforts.



**Goal # 2: Expand income and wealth-building opportunities for working families.**

Objectives	Next Step
	First step for all: Assess partnership opportunities and research the market to design strategies
<p><b>2.1 Strengthen workforce education by providing opportunities for professional growth that allow to adapt to the South Florida labor market.</b></p>	<p>2.1.1 Design workforce education pathways with a two-generation approach that includes an education and training component for parents, and a career readiness and practical skills training component for the youth (partner with local businesses and education institutions to provide hands-on training and learning experiences).</p>
	<p>2.1.2 Periodically identify opportunities in the labor market for in-demand jobs (limit focus) and design a partnership strategy to attain this.</p>
<p><b>2.2 Provide comprehensive support and resources to aspiring homeowners, empowering them to buy and preserve their assets.</b></p>	<p>2.2.1 Assess market changes and educate families in homeownership opportunities in different geographical areas</p>
	<p>2.2.2. Protect vulnerable families from predatory market activity and prevent involuntary displacement by providing education and resources on these topics.  (i.e., creation of wills, taxes, homestead exemption, etc.)</p>
	<p>2.2.3 Share community needs assessment results with different stakeholders to advocate for clients that have challenges in becoming homeowners.  (e.g., financial institutions)</p>
<p><b>2.3 Provide comprehensive support and resources to aspiring and existing business owners, empowering them to establish, grow, and sustain successful businesses.</b></p>	<p>2.3.1 Design a culturally relevant curriculum, based on the specific needs of the community.  (i.e., define what to do internally or when to engage partners effectively; provide different tools, resources, and opportunities to aspiring and existing business owners; include workshops component, coaching sessions component, mentorship component, etc.)</p>
	<p>2.3.2 Explore and evaluate different opportunities to provide aspiring or existing business owners with economic resources to create or sustain their businesses.  (e.g., CDFI opportunity, partnerships with other organizations, exploration of grants, loans, investor connections, etc.)</p>

**Goal # 3: Define and strengthen HUF's role in Policy and Advocacy.**

Objectives	Next Step
<p><b>3.1 Engage stakeholders in conversations around systemic issues that impact South Florida working families.</b></p>	<p>3.1.1 Meet with working families to get their input and feedback on community needs (e.g., organize a townhall meeting with colleges/universities and municipalities; partner with other organizations: ULBC, UWBC, CSC; invite media partners).</p>
	<p>3.1.2 Seize opportunities to meet with elected officials (commissioners/mayors).</p>
	<p>3.1.3 Convene corporate, public, and private stakeholders to discuss Policy and Advocacy matters (e.g., Broward College's Village Square).</p>
<p><b>3.2 Assess and determine HUF's role in addressing the Hispanic gap in Leadership positions.</b></p>	<p>3.2.1 Partner with National organizations that are focused on leadership development (e.g.: Hispanic Leadership Institute - access their trainings, resources, scholarships, etc.).</p>
	<p>3.2.2. Create HUF's leadership development program (including a mentorship program).</p>
	<p>3.2.3 Support the creation of a Hispanic/Immigrant leaders coalition (potential first step: identify existing local elected officials who have immigrant backgrounds; Broward County may be the convener).</p>
<p><b>3.3 Encourage and empower clients to be civically engaged at the local level.</b></p>	<p>3.3.1 Develop an intentional strategy on voter registration and engagement.</p>
	<p>3.3.2 Advocate for the creation of a non-partisan political candidate information guide in Spanish/Haitian-Creole/Portuguese/etc.</p>
	<p>3.3.3 Promote and/or facilitate the participation of the Spanish-speaking/immigrant community in election debates/townhalls/panels.</p>
<p><b>3.4 Empower the staff, volunteers, Board of Directors to become advocates for HUF's clients.</b></p>	<p>3.4.1 Ask HUF staff, volunteers, and Board of Directors to participate in local activities in their respective fields and represent HUF (e.g., Elected officials' townhalls).</p>
	<p>3.4.2 Create an engagement plan for HUF staff and volunteers (e.g., BOD and HUF committee members) that includes call-to-actions.</p>
	<p>3.4.3 Create an ULBC &amp; HUF "Day at the Capitol", "Day at City Hall", "Day at County Commission".</p>
	<p>3.4.4 Review and update HUF's bylaws to include an advocacy component in the Board of Directors' job description.</p>
	<p>3.4.5 Create an ongoing training plan on advocacy for the Board of Directors.</p>

<b>3.5 Develop a comprehensive policy agenda that outlines HUF's desired impact and the areas of policy and advocacy where the agency should work.</b>	3.5.1 Explore opportunities for partnerships with local municipalities to advance HUF's work, both programmatic and around PP&A.
	3.5.2 Ensure agenda is informed by various stakeholders, including clients and staff.
	3.5.3 Make childcare and early childhood education a priority (connected to workforce and economic stability/self-sufficiency); related agenda items – early literacy, school readiness (kindergarten)).

<b>Goal # 4: Position HUF for growth while achieving operational excellence.</b>	
<b>Objectives</b>	<b>Next Step</b>
<b>4.1 Establish strategic partnerships or collaborative arrangements with external parties that advance HUF's mission and fit the Organization's 2024-2026 Strategic Plan goals.</b>	See next steps 1.2.2 - 2.1.1 - 2.1.2 - 2.3.1 - 2.3.2
	See next steps 3.1.1 - 3.1.3 - 3.2.1 - 3.2.3 - 3.4.3 - 3.5.1
<b>4.2 Increase HUF's visibility by strengthening outreach and communication.</b>	4.2.1 Develop a flexible and comprehensive marketing and communications framework (see Appendix F).
<b>4.3 Ensure financial sustainability by diversifying sources of revenue and expanding multi-year and unrestricted funding.</b>	4.3.1 Increase HUF's development capacity by investing in human capital (staff and/or consultants).
	4.3.2 Revisit and revive efforts focused on individual donors (Circle of Friends - Benefits, Engagement, Promotion, Existing Stewardship Activities, Planned Giving, etc.).
	4.3.3 Target family foundations
	4.3.4 Evaluate the Organization's revenue mix by comparing it with similar best-in-class organizations (CBOs) and according to strategic plan Board approved benchmarks, that align with HUF's financial goals and not deviating from the ideal distribution (this will allow to prioritize and identify categories for improvement, define milestones, and adjust the strategy periodically based on progress and industry trends).
	4.3.5 Based on Fund Development's findings and defined next steps to attain diversification of funding, oversee the accomplishment of the agreed revenue mix and advise on adjustment of strategies.

	4.3.6 Identify and assess innovative ideas to grow unrestricted funding (i.e., charging fees for specific programs, creating an investment policy, creating a Board designated endowment, shifting to a social enterprise model by becoming a technical assistance provider).
<b>4.4 Increasing the Board of Directors' capacity to engage in order to effectively and strategically execute their duties and functions</b>	4.4.1 Review and update the Agency's bylaws to strategically guarantee the continuous engagement of the members of the Board of Directors. (i.e., encourage and promote engagement, attendance to in-person meetings, visiting the Agency, attending events, etc.)
	4.4.2 Strategically ensure leadership diversity in HUF's Board of Directors (bench strength).
	4.4.3 Create a Board of Directors formal succession plan to guarantee its sustainability.
	4.4.4 Diversify board composition and Board fund development goals to engage individuals with diverse experiences and insights.
	4.4.5 Assess current BOD members' use of available tools and provide appropriate resources/training.
<b>4.5 Create a dedicated Human Resources Department and hire an HR Manager - Special focus on recruitment, retention, compliance, and staff professional training and development.</b>	4.5.1 Assess HUF's current HR structure to identify strengths, gaps, and opportunities for improvement.
	4.5.2 Expand the current plan to address HR gaps and future growth.
	4.5.3 Design and implement HUF's employee lifecycle.
<b>4.6 Enhance organizational infrastructure to improve overall efficiency and effectiveness.</b>	4.6.1 Assess HUF's current operations infrastructure (facilities, systems, and structures) to identify strengths, gaps, and opportunities for improvement.  (i.e., Prioritize securing a sustainable financial software system to sustain growth and that adheres to required compliance mandates and reporting).
	4.6.2 Develop and implement an action plan to automate infrastructure processes and systems in order to be able to improve efficiency and effectiveness.
	4.6.3 Prioritize and optimize existing facilities (physical and virtual) to increase the footprint needed for growth and ensure efficiency.

## **Framework for Implementation Summary**

Recognizing that the SP is only effective if properly implemented by staff and evaluated by the Board, the ED and executive staff will develop a framework for implementation that will include an overview of:

- 1) Responsible parties and their expected commitments to the implementation process.
- 2) Timelines for execution developed by senior staff and other team members.
- 3) Key Performance Indicators (KPIs) directly related to the SP Objectives and Next Steps that are managed by the staff and provided in summary reports to the BOD.
- 4) Integration of tasks to the Financial-Operating Model for scenario testing and tracking.
- 5) Listing the expected resources needed (financial, personnel, systems, etc.).
- 6) Summary of foreseeable risks (and mitigants) or pitfalls, and a general approach to respond to any execution challenges as they arise.
- 7) Description of the reporting structure to determine how the Board and staff will work together, including clarity on Board involvement and the cadence of accountability.

This framework will be a combination of tools, processes and practices providing the roadmap for staff to implement the SP. The framework will also serve as the checkpoint necessary for BOD to evaluate the Strategic Plan progress using clear KPIs and transparent processes for ongoing feedback, course correction, and resource allocation.

## **Summary/Conclusion**

With more than 40 years of service to the community, HUF is well-positioned to continue fulfilling its mission, increase its impact, and expand support services in broad and deeper ways. HUF is distinguished by its: being trusted in the community, non-partisan standing, and long track record of serving the community needs in a way that lifts and empowers the person – as well as the community, as a whole. Internally, the Organization's current configuration is one of an effective and focused staff, along with an engaged BOD.

Given the strategic planning process' broad stakeholder representation, the multiple data streams, and the enthusiastic participation at all levels (governance, leadership, staff, community partners, clients, etc.), there is a high degree of confidence that the four (4) Strategic Plan Goals and the subsequent Objectives and Next Steps reflect a bold, yet achievable Plan for strengthening existing programs and developing new programs to address growing community needs in meaningful and sustainable ways.

**Appendices:**

- a. State of Hispanic and Immigrant Broward Report (executive summary with link to full report)
- b. Focus Groups Clientele Summary
- c. Community Stakeholder Feedback Summary
- d. Staff Feedback Summary
- e. President and CEO Assessment
- f. Marketing Plan
- g. Financial-Operating Model Outline
- h. Committee Lists
- i. Strategic Planning Timeline
- j. VeraCruz Advisory Consultants Bios

DRAFT



## I. INTRODUCTION AND EXECUTIVE SUMMARY

The *State of Hispanic and Immigrant Broward* provides the analytical framework for the 2021 Broward Equity Initiative. The analysis, performed in tandem with the *State of Black Broward* provides a comprehensive, holistic analysis of key population, economic, and social trends, factors, and conditions that allow for an informed discussion on racial and ethnic equity and disparity issues facing Broward County and its municipalities. The analysis connects various socioeconomic indicators and provides the underpinnings for the subsequent “Broward Equity Plan of Action”, which addresses the barriers and opportunities for meaningful community and human development policymaking.

### Approach and Methodology

The *State of Hispanic and Immigrant Broward* is a data-driven assessment. The methodology for the report includes a detailed data and trend analysis of each of the following topic areas:

- a. Population and Demographic Trends
- b. The Economy
- c. Public Education
- d. Public Health
- e. Housing
- f. Criminal Justice and Safety
- g. Voter Engagement

The analysis is based on a variety of public and proprietary data sources to provide the most thorough analysis of the County’s and individual municipality’s demographic, economy, public health, crime, and voting trends. Data sources include the U.S. Census, American County Survey, Florida Department of Economic Opportunity (DEO) Quarterly Census of Employment and Wages (QCEW), Current Employment Statistics (CES), Local Area Unemployment Statistics (LAUS), Occupational Employment Statistics and Wages (OES), EMSI, Consumer Financial Protection Bureau (CFPB), Florida Department of Health, the Center for Disease Control, Florida Department of Corrections, Florida Department of Law Enforcement, Broward County Public Schools, National Center for Educational Statistics, and the Broward County Supervisor of Elections.

## Analysis and Findings

The report found Broward County has experienced dramatic demographics shifts in the past thirty years marked by rapid suburbanization in the 1990s, a general aging of the White population and steady migration of Hispanic or Latino, Black or African American, and newer immigrant populations over the past two decades.

It is evident that racial and ethnic divides and disparities continue to persist despite laws that were enacted to prohibit segregation and discrimination. Sadly, the COVID-19 pandemic highlighted for all to see the disparities and inequities that continue to exist in Broward County and the nation. Evidence indicates the health, economic, and community impacts of the pandemic has been borne disproportionately by minority populations, individuals and families living in poverty, and noncitizen immigrants. The economic burden of the pandemic has also fallen more heavily on minority workers and business owners.

The *State of Hispanic and Immigrant Broward* and forthcoming “Broward Equity Plan of Action” provide an opportunity for all community leaders to raise the standards in matters of equity and inclusion. According to the Racial Equity Institute, “racial equity demands that we pay attention not just to individual-level discrimination, but to overall social outcomes.” This contrasts with the current state of affairs in which a person of color is more likely to live in poverty, be imprisoned, drop out of high school, be unemployed, and experience poor health outcomes and lack access to safe, decent, and affordable housing.

The following is a summary of the *State of Hispanic and Immigrant Broward’s* key findings:

### Population and Demographics Trends

The report found that Broward County’s recent population growth is being driven by Hispanic and Black migration patterns. Since 2015, Broward County’s most significant population increases were among Hispanic or Latinos (15.6 percent/77,298 persons) and Black or African Americans (7.4 percent/38,010 persons). Broward County’s majority White population (60.7 percent) has grown by only 4.5 percent/15,948 persons. Hispanic or Latino and Black or African American persons now comprise 29.8 percent and 28.6 percent of Broward County’s population, respectively. Significantly, Broward County’s workforce age population (20-55 years of age) has become increasingly Hispanic or Latino and Black or African American.

Broward County’s Hispanic or Latino population is very diverse based on nationality. Cubans (20.7 percent) comprise the largest percentage of the County’s Hispanic or Latino population followed by Puerto Ricans (15.4 percent), and Colombians (14.6 percent). According to the 2019 ACS, the fastest growing Hispanic or Latino populations in the last five years includes Cubans (24,320 persons/25.8 percent growth rate), Venezuelans (17,649 persons/63.8 percent growth rate), and Dominicans (6,995 persons/22.3 percent growth rate).



Broward County's Hispanic or Latino and Black or African American populations reside throughout the County. However, concentrations of both population groups are evident based on historical settlement and newer migration patterns. Concentrations of Black or African American residents are mostly found in established Black communities and neighborhoods, while Broward County's growing Hispanic or Latino population is more concentrated in newer suburban locations.

## The Economy

Strong, equitable, and inclusive economies deliver broad-based prosperity to their residents by providing Stable Long-Term Growth Economic Opportunity, Economic Mobility, and Economic Equity. Prosperity can be achieved when regardless of where one starts on the economic ladder, individuals and families can improve their economic conditions and build wealth, and where the benefits of economic growth are shared by residents across the income spectrum and where they live.

The *State of Hispanic and Immigrant Broward* report found clear evidence of persistent concentrations of income inequality in Broward County's Hispanic and Black communities. Income inequality has resulted in low median household and per capita incomes, higher poverty and unemployment rates.

- **The median household income of Hispanic or Latino households is at 87 percent of White households.**
- **The percentage of Hispanic or Latino families with children living in poverty is twice as high as White families and nearly four times higher among Black or African American families.**
- **Significantly, the labor force participation rates for Broward County's Hispanic or Latino (71.6 percent) and Black or African American (71.0 percent) populations are much higher than Broward County's White, Non-Hispanic (58.9 percent) population and that of the U.S. (61.8 percent).**

## Public Education

According to the National Equity Project, "educational equity means that each child receives what they need to develop to their full academic and social potential". Equity in education is the process of reforming practices, policies, and procedures at the school and district levels to support academic fairness and inclusion, and ensure that every child has the resources, teachers, interventions, and supports they need to be successful.

According to the Washington Center for Equitable Growth, education is one of the most important long-term drivers of both economic growth and equity. Education adds to human capital (the education, training, and health of workers) thereby increasing labor productivity and the value of the worker. The quality of education that students receive also directly correlates to their quality-of-life years down the road. **Early education, in particular, has the power to shape a child's future and provide them with more resources.** It is for these reasons that it's crucial for local educators to address any barriers young students face to succeeding in school.

The *State of Hispanic and Immigrant Broward* report found Broward County Public Schools are more racially diverse than Broward's overall population. Significantly, Hispanic or Latino and Black or African American graduation rates have significantly improved in the last ten years. However, "unexcused absences" are significantly higher among Hispanic or Latino and Black or African American students than White students.

The report found significant disparities in:

- **Advanced Placement (AP) Exams passing scores between White students and Hispanic or Latino and Black or African American students.**
- **Most of Broward County Public Schools graded as C or D are located in communities with high concentrations of Hispanic or Latino and Black or African American populations.** This includes 22 of the "2021-2022 Lowest 300 Performing Elementary Schools" in the state.

## Public Health

According to the National REACH Coalition, "equitable health care means that all individuals have access to affordable, high quality, culturally and linguistically appropriate care in a timely manner. This includes health care quality; patient education and empowerment; health care infrastructure; health care policy, and program administration."

Equitable health care in Broward County is being impacted by a variety of economic and social factors including poverty and the lack of affordable housing. Lower income households are often forced to choose between health care and buying food, medicine, and paying the rent.

The *State of Hispanic and Immigrant Broward* report found a wide disparity in infant mortality rates among Broward County's Hispanic or Latino and Black or African American populations than the White population.

According to the Florida Department of Health, there are substantially higher HIV and AIDS infections and deaths among Broward County's Hispanic or Latino and Black or African American residents than Whites. However, while HIV diagnosis rate among Broward County's Black or African American population has decreased from 90.1 per 100,000 population in 2010 to 50.9 in 2019.

- **HIV diagnosis rate among Broward County's Hispanic or Latino population has increased from 30.8 per 100,000 in 2010 to 36.0 in 2019.** While the percentage of Broward County's uninsured Hispanic or Latino and Black or African American populations has decreased in the last five years.
- **Hispanics or Latinos are three times more likely to be uninsured (18.2 percent) vs the county's uninsured (5.9 percent) white population. And Black or African American uninsured (10.1 percent) levels are double of the County's uninsured (5.9 percent) White population.**

## Housing

The availability of quality affordable housing is critical in creating diverse and inclusive cities and counties. Affordable, safe, quality housing can provide the anchor for nearby jobs, education, public transportation, and health care. This should matter to cities and counties, not just on equity grounds, but because healthier and more educated residents benefit the local economy by forming a more robust and productive workforce.

Housing affordability also affects educational performance and attainment and the quality health care. Households with better affordability ratios generally have higher rates of savings, more cash, and/or higher levels of equity (in an owned home) that can be applied to education spending for their children. Cost burdened families are also more prone to unexpected health expenses that can throw a family into foreclosure or eviction.

- **The *State of Hispanic and Immigrant Broward* report found higher levels of cost-burden and overall housing distress (i.e., age, condition) in less affluent Hispanic or Latino and Black or African American communities.**
- **The report found homeownership rates are significantly lower among and Hispanics or Latinos and Black or African Americans than Whites.** The report also found significant fair housing and lending issues in Broward County.
- **Hispanic or Latino and Black or African American home purchase-loan denial rates are much higher than White applicants. High-cost owner-occupied home purchase loans are also more prevalent among Hispanic or Latino and Black or African American applicants than White applicants.**

## Criminal Justice and Safety

Racial justice is the systematic fair treatment of people of all races that results in equitable opportunities and outcomes for everyone. A just and equitable criminal justice system allows all people to achieve their full potential in life, regardless of race, ethnicity, or the community in which they live. According to the Opportunity Agenda, “an equitable criminal justice system should ensure that all individuals feel safe and secure in their communities and be administered in a fair and just manner with a commitment to equal treatment and accountability.”

- **The *State of Black Broward* report found that Broward county’s overall arrests declined by 39.3 percent since 2011. Most crime activity by type in 2020 included drug arrests (4,226), larceny (2,678), simple assault (1,917), and DUI (1,064).**

According to the Florida Department of Juvenile Justice’s 2020 Delinquency Profile Dashboard, Broward County ranked 4th in Juvenile intake-arrests (2,735 arrests). Juvenile arrests were down 61 percent in Broward County and 54 percent statewide from 2015 to 2020 due in part to the COVID-19 pandemic. However, juvenile intake-arrests in Broward County by race showed a significant disparity between White and Black. In 2020, 71 percent (1,955) of juvenile arrests were Black compared to 11 percent (310 arrests) among White juveniles. Hispanics comprised 16 percent (449) of arrests. Statewide, 51 percent of juvenile arrests were Black, 33 percent white, and 16 percent Hispanic youth. A further analysis of juvenile arrest activity in Broward County, shows the highest volume of juvenile arrests occurred in Broward County zip codes with high concentrations of Blacks or African Americans.

## Voter Engagement

Voting is the most basic right in our democracy, but too many people, especially people of color, are often locked out of the process through Jim Crow type voter suppression laws. As the cornerstone of American democracy, a fair and equitable election system would remove persistent barriers to voting and work towards a strong and modern voting system where all eligible citizens are motivated to vote, can do so with ease, and can reasonably trust that election outcomes are legitimate. The on-going struggle for racial justice has been put to the test in recent years. U.S. Supreme Court ruling in the 2013 Shelby County v. Holder Case has made it easier for states to pass voter restriction laws. The report found 361 bills have been filed in 47 states that would limit mail, early in-person, and Election Day voting with such constraints as stricter ID requirements, limited hours, and narrower eligibility to vote absentee. In Florida, on May 6, 2021, Florida legislators passed into law with immediate effect. The law will make it harder for Floridians to cast a ballot by mail, force voters to submit vote-by-mail requests more often than is currently required and eliminate secure vote-by-mail drop boxes.

The *State of Hispanic and Immigrant Broward* report found Broward County’s voting age population has increased by 20.5 percent since 2008 (192,476 voters). The County’s White voting age population has decreased by 8.2 percent (48,828 voters).

- **The County’s Hispanic or Latino and Black or African American voting age populations have increased by 98.8 percent/141,935 persons and 46.7 percent/ 98,569, respectively.**

The report found significant growth in Broward County’s Hispanic or Latino and Black or African American voter age population since 2008. Broward County’s voter turnout in the 2020 election was significantly higher by race and ethnicity than other recent elections.

## IX. PATH FORWARD

The Broward County Equity Initiative provides an opportunity for leaders to hold our community to a higher standard in matters of racial equity and inclusion. As noted in the Introduction and Executive Summary, the purpose of the *State of Hispanic and Immigrant Broward* report, produced in tandem with the *State of Black Broward*, is to provide a holistic and integrated assessment of existing disparities and inequities in Broward County that will serve as the analytical underpinnings for future policy discussions and direction.

The *State of Hispanic and Immigrant Broward* and *State of Black Broward* reports found clear evidence that disparities and inequities exist in many forms in the County, including essential community functions. Broward County's racial and ethnic inequities and disparities encumber economic opportunity, educational attainment, quality healthcare, affordable housing, and equal justice among Black, Hispanic, and immigrant populations. The two reports are an important first step to align efforts towards applying an equity lens to address the imbalanced economic and social systems in a manner that leads to long-term, sustainable, equitable access for generations to come in Broward County.

The path forward will be guided and supported by community input at all levels with the objective of advancing equity and inclusion through an actionable policy framework. Following the roll-out of the reports, we will work to create spaces and opportunities for all business, government, faith, and community groups, as well as our families, to participate and hold Broward County accountable in matters of racial and ethnic equity and inclusion. These efforts will provide context for the Broward Equity Plan of Action, our forthcoming and final report.

The work in the months ahead is intended to sustain resident empowerment and equity and build social cohesion. The Broward County Equity Initiative will be a tool for community groups that seek to holistically integrate planning, community education, advocacy, and resident support in Black, Hispanic and immigrant communities and neighborhoods across Broward County.

Ultimately, our hope would be that collectively, we - business, government, faith, community groups, and families- can truly advocate for game-changing strategies in Broward County's communities to address social and economic barriers impacting our families and provide the resources necessary to help families achieve long-term, positive life outcomes.

You can show your active support in many ways:

- Share the report with others
- Invite a deeper conversation on the reports' findings
- Engage in existing networks of change that are of interest
- Support local organizations engaged in racial equity work

If you are interested in actively supporting or would like more information, you may reach us by calling 954.964.8884 or visiting [www.hispanicunity.org](http://www.hispanicunity.org)



In April 2023, Hispanic Unity of Florida (HUF) engaged in three targeted listening sessions with clientele served in major program areas: Family Strengthening and Preschool Center (8), Center for Working Families (6) and Unity 4Teens (9). Participants were selected by HUF Division heads based on representing a broad range of client backgrounds and experiences in various HUF programs and service offerings. Interviewees were picked both for their experience in HUF programs and a higher likelihood of being candid/comfortable in a group interview setting. Interviews were conducted by Juliana Esguerra and Felipe Pinzon via Zoom (Family Strengthening/Preschool Center and Center for Working Families), and in-person by Juliana Esguerra, Felipe Pinzon, and Otayme “Otto” Valenzuela (Unity 4Teens) using a questionnaire co-developed with VeraCruz Advisory. Recordings of the meetings as well as summary analysis were provided to VeraCruz Advisory for additional review and analysis specific to the strategic planning process. Overall, though the target sample was small, based on the selection process, and interviewee backgrounds there is a high degree of confidence that the groups interviewed reflect a broad representation of the clientele served by HUF.

Below is a high-level review of the findings and impressions of the clientele listening sessions.

- 1) High level of trust, commitment, and competency
  - While often mentioned, the level of trust that HUF has in the community is a valued and distinguishing organizational characteristic.
  - HUF is trusted and is also seen as competent and caring. Clientele feel treated with respect and spoke highly of staff, specifically front desk, and program supervisors. Support of families is a point often mentioned and appreciated by those served.
  - Most clients have participated in more than 1 program and spoke of the integration of services and demonstrated the impact of 2Gen approaches.
  
- 2) Immigrant families are facing multiple challenges
  - Housing Affordability (for both rental and ownership)
  - English language for new immigrants
  - Complexity of immigration process and application
  - Earning wages consistent with raising a family
  - Becoming a business owner
  - Managing multiple jobs while raising family
  - Upward mobility/getting ahead
  - Healthy/safe activities for children that advance academics
  - Low expectations for educational outcomes/college or career readiness

- Pending SB 1718 Legislation (perceived and actual effects)

### 3) Clients identified several additional HUF service opportunities

- Rental assistance
- Geographical expansion and/or transportation to HUF program sites
- Additional levels/opportunities for Family Strengthening Program
- Support programs for Dreamers
- Programs for Senior Citizens (language, activity, health)
- Educational activities that integrate social and educational activities
- Teaching of Life Skills, Financial Literacy, helping youth be ready to enter 'the world'
- Preparation or training for future business ownership
- Education savings account/scholarship
- Expand childcare services (specifically for young mothers/parents)
- Mental-behavioral health services

### 4) Areas of improvement

- Better understanding of variety of support services offered by HUF
- Ability to access HUF services closer to home/expand geographical footprint Central and North Broward
- Interviewees thought that HUF could be doing more to be visible in community spaces and on radio and TV

### 5) General overlapping themes

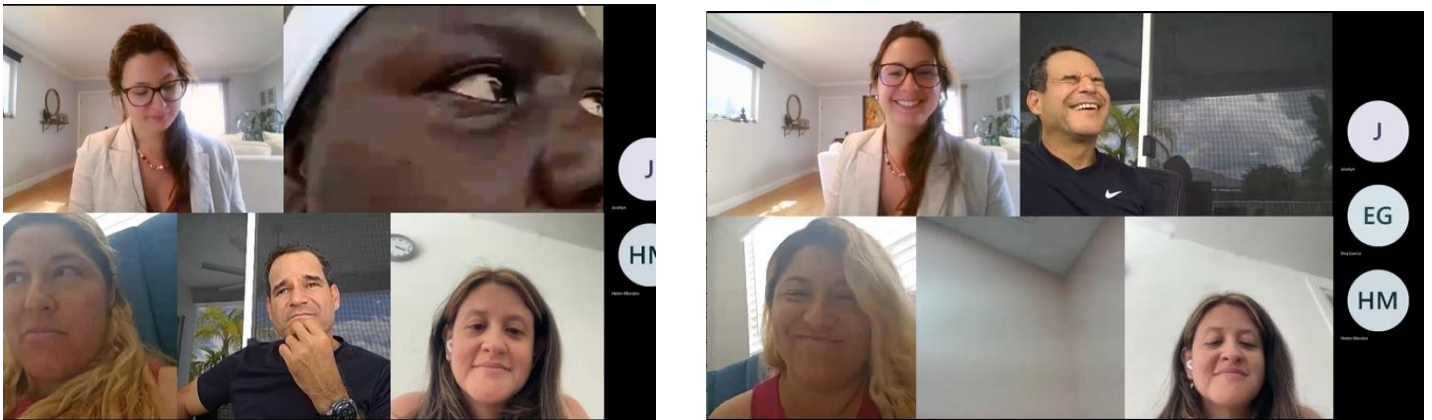
- Empowerment for asset growth and ownership (Programs)
- Pathway to asset growth (Education)
- Desire for business and home ownership
- Closing income gap
- Family support and strengthening
- Educational opportunities to advance academically, socially, and in life skills



## 2023 STRATEGIC PLANNING Clients Focus Group

As part of Hispanic Unity of Florida’s (HUF) Strategic Planning process, the agency conducted a virtual focus group with 6 clients of different programs of the **Economic Development Department on April 21.**

The participants discussed topics related to the programs they are involved with, their knowledge about the agency, and different community needs. Below is a recap of the main topics discussed.



### 1. Please tell us a little bit about your background and your family’s background

- Helen Morales – Originally from the Dominican Republic. She has been in the USA for 6 years. She lives with her 2 kids (5 and 11 years old) and her husband. She studied business administration and had a good job in her country working at one of the main hospitals. She came to this country with an American Dream but as soon as she arrived, she got pregnant, and her husband lost his job. Since then, they have recovered and were able to buy a house in Miramar. She also studied to become a medical assistant. She is currently a CWF participant.
- Marisol Florez – Originally from Colombia. She moved to Rhode Island when she was 12 years old. In 2009 she moved with her family to Canada since her father lived there. She went to college in that country. Her parent’s relationship declined at that time, which is still a difficult situation for her, and the reason why she is a participant in the HEAL program. She moved back to the United States recently, and at this moment is living in a 1 bedroom/1 bathroom apartment with her mother and daughter.
- Joselyn Rodriguez – Born in the USA but her parents are from the Dominican Republic. She has 3 kids and is a single mother. She has been a client of the income support team for several years.
- Kenlly Ayerdis – Originally from Nicaragua. She is a single mother and has 1 kid (2 years old). Her kid was born in the USA. She immigrated due to the political and economic



situation of her country. She is a professional in her country but in the USA, she has worked in several things. She cleans houses and works doing makeup. One of her challenges has been to learn English. She is a client of the Comprando Rico y Sano and of the Family Strengthening Programs.

- Angela Hill – She is originally from England but her mother was Cuban. She has been living in her car for 5 months because she was not able to keep paying rent. The agency has helped her with several things including food. She is a citizen and has been struggling for a while. Her daughter lives in Naples and is in nursing school. She is currently participating in the Advancing Health Literacy program.
- Elsa Garcia – Originally from Cuba. Arrived in the USA in 2002. She is a single mother. She has been a client of HUF since 2004. She joined the agency through the ESOL program. She has also been a client of the Income Supports programs for several years. She works as an assistant in several offices and is also an active volunteer for several causes.

**2. How did you learn about Hispanic Unity of Florida?**

- 2 participants mentioned they arrived at HUF thanks to friends.
- 1 participant heard about HUF through her property manager.
- 1 participant learned about the agency through her husband.
- 1 participant learned about the agency through a family member.

**3. If you would like to learn about HUF’s services, how would you do this?**

- 1 participant mentioned she usually calls the main phone number of the agency to make appointments.
- 1 participant mentioned she directly calls the member of the staff that she knows.
- 1 participant mentioned she uses WhatsApp to contact her Success Coach directly.
- 1 participant mentioned that she usually sends text messages, calls the agency, or when she is close to the office makes appointments with the front desk.

**4. Programmatic knowledge:**

- Unity 4Kids: No knowledge.
- Unity 4Teens: No knowledge
- ESOL: 1 participant learned about HUF through this program. She mentioned she was one of the first participants in the program 20 years ago. She believes the staff is very knowledgeable. The program was very useful for her. She highlighted participants are evaluated according to their level of English. She also received GED classes. Another participant mentioned she knows several individuals who have not been able to join the ESOL program because of their schedule

\*\*Other services that should be offered:

- Schedule expansion – ESOL program at night.
- Family Strengthening Program: 1 participant is part of this program. She mentioned she is very happy and has learned a lot as a mother. She likes the curriculum and believes the staff is well-prepared and always willing to help.



- Center for Working Families: 1 participant mentioned she has been part of the program and has attended workshops oriented towards interview preparation. She is currently receiving financial education.
- Pathways to Homeownership: 1 participant was part of the program, but she did not end up buying a home.
- Emerging Entrepreneurs: No Knowledge.
- Free Tax Preparation Services: 1 participant has been filing her taxes through HUF. She mentioned the program staff is very competent and every year they provide useful information about new laws that allow families to maximize their tax returns.
- Comprando Rico y Sano: Several participants have been part of this program. One of them highlighted the grocery tour activity and the education oriented toward nutrition. Another participant mentioned she attended one of the *Charlas*.
- HEAL: 1 participant is currently part of the program. She indicated she is thankful for the one-on-one interactions with well-prepared staff members but also enjoys the group sessions. She mentioned she is thankful for the passion of the staff, who helps to see things from a different perspective in hard moments.
- Pathways to Citizenship Classes and Naturalization services: 1 participant was a client of the Pathways to Citizenship program. She also filed her naturalization application through HUF. She liked they talked to her in English all the time, helping her to be better prepared for the process, and that they did mockup interviews.

**5. Do you feel welcomed and supported by HUF’s staff?**

All participants expressed that they feel very welcomed and supported by HUF’s staff. They highlighted several staff members by name. They also mentioned HUF staff always try to find programs that could be beneficial to them.

A participant indicated that when someone arrives at the front desk, the individuals that take care of them treat them with the utmost respect. She feels very connected and is thankful for the attention, passion, respect, and follow-up efforts of the staff.

**6. What other services do you think HUF should offer to better serve the community?**

- Rental Assistance – Connection with places that do not ask for so many prerequisites.
- Geographical expansion (some individuals do not have transportation to get to HUF).
- Expansion of services.
- Expansion of immigration services – Support for “dreamers”.
- Program for seniors (So that they can spend several hours learning English, taking workshops, making crafts, enjoying activities, etc.)

**7. What challenges are you and your family facing? What are the most important challenges facing immigrant families in South Florida?**

- Housing: Not accessible due to inflation.
- English for new immigrants.
- Immigration.





**8. How would you rate HUF and would you recommend the agency to others?**

The participants agreed they would rate HUF 5/5.

1 participant shared that every person that she has recommended HUF to has been thankful for the connection. The agency has provided important information to them and has been able to address their needs.

1 participant mentioned the agency is always available to help and if a staff member doesn't have an immediate answer, they always look for it afterward. She also highlighted the great attitude of the staff and the way they treat clients.

1 participant indicated she is thankful because the agency is always trying to improve, which is evident through the focus group.

**9. Are people in the community aware of the services provided by HUF?**

Participants agreed the agency needs to be more visible to the community.

1 participant mentioned the agency should be more visible in spaces like churches, grocery stores, and other places that the community visits frequently.

1 participant mentioned HUF should be more visible through radio and TV so that more individuals get to know about the programs and services offered.

## 2023 STRATEGIC PLANNING Clients Focus Group

As part of Hispanic Unity of Florida's (HUF) Strategic Planning process, the agency conducted a virtual focus group with 8 clients of different programs of the **Education Department on April 19**.

The participants discussed topics related to the programs they are involved with, their knowledge about the agency, and different community needs. Below is a recap of the main topics discussed.



### 1. Please tell us a little bit about your background and your family's background

- Paula Raymond – Originally from Colombia. Part of different programs at HUF. Mother of 2 teenagers (14 and 17 years old). She is divorced. She lives with her mother as well. She is a Medical Assistant and a Licensed Practical Nurse but because of her medical condition, she is a high-risk patient and can't work at this moment. She has been in the USA since 1999. She heard about HUF only recently.
- Fatima Flores – Originally from Nicaragua. A recent client of the Family Strengthening Program. Mother of 3 children (1 teenager and 2 small children). She has cleaned houses for 15 years. She has been in the USA for 17 years and was not able to go back to her country to visit her family until 4 months ago because of her immigration status. She is still waiting for her green card.
- Rosangela Landa – Originally from Venezuela. She is a stay-at-home mom. She cleans houses 2 times per week. She has 2 daughters (4 and 11 years old). She lives with her children and her husband. She applied for Asylum and has been in the USA for 2 years.
- Beatriz Ramos – Originally from Venezuela. She is 50 years old. Has been in the USA for 11 years. Mother of 2 teenagers. Participant in the Family Strengthening Program. Lives with her husband and 2 children. Her husband works remodeling houses and she does several things (Uber Eats, Engraves perfume bottles for several brands, has worked cleaning houses, as a chef, and taking care of children).

- Dayana Luna – Originally from Venezuela. Lives with her husband and her 2 children (4 and 9 years old). Her 4-year-old son is a participant in Unity 4Kids. They arrived in the USA 7 years ago. The rest of her family is still in Venezuela. Her husband is a handyman and inspector. She has been working for 3 years preparing taxes.
- Maury Mota – Originally from Venezuela. She is a single mother of a 13-year-old. Her daughter is a participant in the Unity 4Teens program at Apollo Middle School. Her family is also part of the Family Strengthening Program. In Venezuela, she had many opportunities and was in a good economic situation. She moved to the USA 4 years ago. She has been working at a restaurant for 2 years. She has also participated in the Emerging Entrepreneurs workshops. After several years she received her work permit.
- Sandra Garzon – Originally from Colombia. Participant in the Family Strengthening Program. Mother of a 1-year-old and a 6-year-old.
- Lady Garcia – Originally from Colombia. She arrived in the USA 1 year ago with her 2 children (3- and 10 years old). Her youngest child is a participant in the Unity 4Kids program. In Colombia, she owned a small business oriented toward retail. Since this is her passion, she has tried to find something related to this industry but the opportunities she has found do not pay well, therefore, she cleans houses. She works per hour and has not gained the confidence to charge a specific rate to her clients.

## **2. How did you learn about Hispanic Unity of Florida?**

- 1 participant mentioned that while making a line in a food drive, she met a staff member of HUF who was providing information about the agency and its programs.
- 1 participant expressed that she heard about HUF's Unity 4Kids through a family member. This person heard about the agency through a friend.
- 1 participant indicated she lives close to the agency and decided to walk into the building one day to get more information about the services offered.
- 2 participants heard about HUF thanks to friends when they were in need.
- 1 participant was invited by a friend to HUF's Family Strengthening Program.
- 1 participant mentioned that she heard about HUF when a staff member was doing outreach at the trailer park where she lives.

## **3. Besides the programs that you participate in, are you aware of other programs offered at HUF?**

- 1 participant indicated she is aware HUF prepares taxes and she is interested in working at one of the sites next year. Because of this, a second participant indicated she would like to get trained and become a volunteer for VITA.
- 1 participant mentioned she is aware of the citizenship services offered by the agency and contacted HUF for her grandmother's process.

## **4. If you would like to learn about HUF's services, how would you do this?**

- 2 participants said they have called several times but, in some cases, no one picks up, and/or they return the call too late.

- 1 participant said she would look at HUF's website.
- 1 participant expressed that she would look directly into the website, but she would also ask her success coach.
- 1 participant mentioned she prefers to talk directly with someone; therefore, she would contact one of the staff members she already works with.

## 5. Programmatic knowledge:

- Unity 4Kids: Participants aware of this program highlighted the pedagogy. They love that they are seen and treated as a family. The kids really enjoy the program. They like the interaction the staff has with the parents every day, letting them know about the activities the kids do. This allows the parents to confirm the great work of the agency, which is evident when a 3-year-old is excited about going to school every day. They highlighted the team members and the balanced nutrition provided to the children.

\*\*Other services that should be offered:

- Kindergarten.
- Geographical expansion.
- Unity 4Teens: The parent of one of the participants of this program mentioned she is very happy with its quality and is thankful for the service. Her daughter is very happy as well. Her daughter attended the summer camp and on her last day a staff member shared with her about the after-school service, and she decided to register her child in this school because of this. She drives every day to the school to take her even though it is far away from her home only because she wants her daughter to be able to keep participating in the program.

\*\*Other services that should be offered:

- Physical activities.
- Geographical expansion.
- ESOL: No Knowledge
- Family Strengthening Program: A participant shared that the program makes individuals look at things from a different point of view. It also reminds parents that they also need time for themselves. Another participant highlighted the fantastic experience and the follow-up efforts of the team, which makes participants learn all the tools and helps to improve family relationships. She indicated FSP allowed her to be free and heal many things of her past. It reminded her of many things of her childhood that she doesn't want to replicate with her children. She highlighted the sweetness of the team. Another participant indicated she has learned how to free herself and find balance, and understand others. The team feels passion and participants are not treated as a number. One of the participants indicated when you move to this country communication becomes harder because you must do so many things and work so much. She indicated "You turn into someone else". The program teaches participants how to do things differently.

\*\*Other services that should be offered:

- Additional levels of the program to keep learning.
- Center for Working Families: No Knowledge.

- Pathways to Homeownership: Basic knowledge of one participant.
- Emerging Entrepreneurs: No Knowledge.
- Free Tax Preparation Services: Basic knowledge of one participant.
- Comprando Rico y Sano: No Knowledge.
- Te Ayudo: No Knowledge.
- HEAL: No Knowledge.
- Pathways to Citizenship Classes and Naturalization services: Basic knowledge of one participant.

**6. Do you feel welcomed and supported by HUF's staff?**

All participants expressed during the focus group that they feel very welcomed and supported by HUF's staff. They highlighted several staff members by name.

**7. What other services do you think HUF should offer to better serve the community?**

- Physical activities for children because these are very expensive.
- Geographical expansion of services offered to children and youth.
- Geographical expansion of the agency in general

**8. What challenges are you and your family facing? What are the most important challenges facing immigrant families in South Florida?**

- Becoming a homeowner.
- Becoming a business owner.
- The transition from "living to work" to "working to live". Currently, work has become the entire life of individuals and especially of immigrants. Even when you have several jobs it is almost impossible to save money.
- Learning English.

**9. Do you feel welcomed and supported by the community in South Florida?**

- A participant said she felt great when she arrived in South Florida but she is now aware that her family would have better opportunities in other states. Housing prices are too high. She is afraid of starting from scratch again and she feels worried about not having a network somewhere else. She feels economically trapped in South Florida.

**10. Are people in the community aware of the services provided by HUF?**

Participants agreed the community needs to be more aware of HUF.

- A participant mentioned there should be more marketing efforts.

**11. Are HUF's programs and services accessible and easy to participate in?**

Participants agreed there should be additional locations because some individuals do not have the opportunity to go to the main office and can't access and participate in HUF's programs. They also agreed there should be more efforts to share all the programs the agency offers with current clients.



## 2023 STRATEGIC PLANNING

### Clients Focus Group

As part of Hispanic Unity of Florida's (HUF) Strategic Planning process, the agency conducted a focus group with 9 participants of the **Unity 4Teens – LEAP High Program at Hollywood Hills High School on April 17.**

The participants discussed topics related to the program, their knowledge about the agency, and community and students' needs.

Below is a recap of the main topics discussed.



#### **1. Please tell us a little bit about your background and your family's background.**

5 participants indicated they were 16 years old; 2 participants 17 years old; and 2 participants 18 years old. The background of their families was diverse. 1 participant mentioned his family was from the United States (Kentucky), and the other participants mentioned they have a Hispanic or Caribbean background (parents from Mexico, the Dominican Republic, Haiti, Colombia, Bahamas, Honduras, and Dominica).

#### **2. How did you learn about the Unity 4Teens program?**

- Several participants mentioned they heard about the Unity 4Teens program through friends or other students.
- One participant mentioned he heard about the program thanks to his wrestling coach, who mentioned it was a great opportunity for him to do homework and arts and crafts.
- One participant mentioned she saw a poster in one of the school's hallways.
- Some participants heard about the program through their teachers.



- One participant is a former member of HUF's Unity 4Teens program - Middle School. She indicated her mother looked for a while for an after-school program when she transitioned to High School but couldn't find one. As soon as the program opened in Hollywood Hills for 10<sup>th</sup> and 11<sup>th</sup> graders she joined.
- One participant heard about the program at a fair. She saw a table with flyers promoting the program. Then, a teacher gave her more details.

### **3. What do you like about the Unity 4Teens program?**

Participants mentioned they like diverse things about the program. They highlighted:

- The opportunity to study and do other things. Even seating down and "chill out" if they want to.
- That everyone is together and willing to help each other.
- That everybody has different backgrounds.
- That teachers are always willing to help out.
- Tutoring opportunities.
- The opportunity of doing homework in school so that they don't have to do it at home.
- Homework support.
- The summer camp activities.
- The "awesome" people to talk with.
- Arts and crafts, especially painting.
- That the staff always comes up with new things to keep them engaged and not bored.
- Working together.
- Being able to get service hours for graduation.
- Activities such as cooking and painting.
- Meeting other people and visiting places.
- Field trips.
- Financial literacy classes.
- Not being lonely when going back home.

### **4. How long have you been a participant in the program?**

1 participant has been in the program for 2 years. The rest have been in the program between 6 and 9 months.

### **5. What program services should be expanded?**

- Sports activities in general (soccer, football, baseball).
- Field trips (not museums, more fun and experiential activities like the Frost Museum, Indian Reservations, and water parks).
- Events that revolve around the holidays (making treats or playing games depending on the holiday).
- Arts and crafts (especially painting).
- Cooking.
- Cultural activities (like the Powwow) where the youth can get more engaged.
- Break activities that allow them to disconnect (Movie days or parties twice per month).



- Fundraising activities (several participants shared their willingness to volunteer and fundraise for activities and even for HUF. They suggested doing a carwash or a bake sale to attain this, and even visiting homeless communities to help them and share HUF's services with them).

### **6. Is the program what you expected it to be?**

The participants agreed the program was more than what they expected. Several of them mentioned they thought it was a place only for tutoring or doing homework and they got very excited when they found out they would do diverse activities. They also shared they like it is not a rigorous or extremely structured space.

A participant, who was a previous member of Unity 4Teens Middle School, mentioned she enjoys that LEAP High is less structured than Youth FORCE because high school is more rigid than middle school and high schoolers need to have a break from that. Another participant mentioned that before joining the program he believed it was going to be very structured and he would have to follow a tight schedule. It was a nice surprise knowing that they can do things at their own pace as long as they make sure they finish everything by the end of the day. The participants indicated everybody is different and some people like that it is not structured. But when everybody enters the room they know they need to focus on homework first. They saw this as an “unspoken rule”.

One participant indicated he thought the program was only for Hispanics but then he found out everyone is welcome and he felt very excited about it. He mentioned he enjoys there is a mix of people participating in the program.

### **7. Do you feel welcomed and supported by the Unity 4Teens staff?**

The participants agreed they feel welcomed and supported by the Unity 4Teens' staff. They are constantly reminded that if they need help they just need to ask, and they indicated the staff can be easily approached.

### **8. Are you aware of other services that Hispanic Unity of Florida offers to the youth and their families? Are you aware if your family is receiving or has received in the past other services provided by Hispanic Unity of Florida?**

8 participants indicated they are not aware of other programs or services offered by Hispanic Unity of Florida, and that they are not aware their families have received any other services offered by the agency.

1 participant indicated her mother is very active and checked if HUF provides other services. She has received financial support, employment services, and housing education through the agency. She highlighted her mother goes to meetings frequently and is constantly talking with HUF staff.

Several participants attended a Financial Literacy class HUF provided earlier in 2023, and some of their parents attended as well. They agreed the agency offered digestible information that went straight to the point during this activity.





**9. What's something else HUF could do to help you or your family? What are some of the needs your family has?**

The participants agreed the education system can improve. They feel they do not get prepared for practical things to face “adult life” once they graduate. They mentioned it is important to receive more preparation on topics such as Financial Literacy, as this is a life skill they need to start developing in High School. They mentioned topics such as credit scores and paychecks will be important to them once they graduate, otherwise, they will have to figure this type of thing out by themselves. Certain participants mentioned they should also learn about the stock market and the economy before they graduate. Those topics should be taught in the 10<sup>th</sup> and 11<sup>th</sup> grades. Some kids get that knowledge from their parents, but it shouldn't be their responsibility.

A participant mentioned school is designed for individuals that want to work a 9 to 5 job. Certain things should be taught to increase the possibility of them becoming business owners. The participants agreed the system is designed to feed these types of jobs and reduce the amount of competition.

A participant mentioned the agency should offer scholarships to children and their families. Another one indicated HUF should offer seed money so that the youth can start investing and/or creating their businesses since high school.

**10. What are the main issues the community faces? What can HUF offer to better serve the community?**

- A participant identified homelessness as one of the main community issues. Other participants mentioned it is important to help people that are at risk so that they don't end up in that situation.
- Several participants indicated it is important to offer services related to childcare and education on how to raise kids to new parents.
- Some participants indicated the agency should think about offering services for teenage mothers and single parents (childcare services and education so that they can take time for themselves and focus on other important things for their future).
- Some participants indicated it is important to focus on the immigrant population. The agency should offer English classes and basic Literacy education, as well as financial education to this population.
- 1 participant was aware of the Florida immigration bill. He mentioned that right now if an immigrant that does not have a status goes to a hospital he/she can be deported or go to jail. The participants agreed minorities are a target of the system in the United States. Racism was mentioned several times.



**11. What are the main issues the youth faces?**

- Mental Health (need for therapy and support).
- Health issues from being exposed to electronics all of the time and being exposed to elements such as vapes
- Family support (some high schoolers need to take care of their siblings).
- Peer pressure.
- Not having opportunities to fail and explore themselves (who they are, how they feel, who they like).
- Not having spaces to explore who they want to be once they graduate. Getting ready for adult life.

**12. If you had not joined Unity 4Teens, what would you have done after school and during the summer?**

- 1 participant mentioned he would be playing on the street after school.
- 1 participant mentioned he would be working in plumbing because that is something he does.
- 1 participant mentioned she would be staying at home using her cell phone.
- 1 participant indicated he would be “dealing with family at home” and taking care of siblings.
- 1 participant said he would be reading and figuring out what to do.
- 1 participant said he would be bored at home.

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

Between February 2023 – May 2023, Hispanic Unity of Florida (HUF) community collaborators, other NFP agencies, elected and government officials, donors, and other key stakeholders were engaged in interviews (in-person and via phone or Zoom) by VeraCruz Advisory (HUF’s strategic planning consultants). The interviews were aimed to get a bottom-up perspective from individuals and organizations that interact with HUF. This community feedback was used to help clarify HUF’s ‘value proposition’, its position in the community, the perceived/real operational strengths/blind spots, as well as its opportunities to strengthen or expand existing programs in response to specific community needs.

Conversations were all candid and overwhelmingly supportive of HUF’s work, and stakeholders provided key insights regarding challenges facing the community within Broward County and some opportunities for HUF.

## **Summary:**

There were broad themes with a higher than usual occurrence around the central challenges faced by immigrants, and the greater Broward County community. Interview feedback was analyzed to find overlapping themes and an adjusted quantitative scale was created to isolate nine (9) core themes outlined below.

### **1) Value Proposition**

*Summary:* HUF’s principal value proposition to serve the needs of immigrants of Broward County was clearly understood by all stakeholders. Specifically, HUF was considered a trusted resource and leader in providing services in education, citizenship, and economic development to the immigrant community as well as referrals to other NFPs and government agencies for a host of other social and family services.

Within these particular values there was a sense that economic development and family strengthening/support were the underlying themes that united the key program-service lines of the organization. Unity4Kids and Unity4Teens were mentioned as providing working families with safe options for children while addressing issues of education and workforce readiness. The Center for Working Families was noted as providing family support and access to critical social and economic services. Also mentioned were Citizenship classes, Legal services and VITA tax preparation services to integrate immigrants into the community and fostering participation in the civic and economic fabric of Broward County.

In providing these direct services, it was deemed that HUF had unique community needs/strengths insights, and played a critical role in assessing and advocating for the needs of the community.

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

“HUF is the most trusted immigrant and Latino serving organization in Broward County. They know the community and advocate for them through their working relationships with other agencies.”

“The idea that they provide services for working families, and then help those families become productive, working, engaged citizens, paying taxes and contributing to build up the future of Broward County, who can argue with that?”

“Hispanic Unity brings a lot to the table, Josie, and now Felipe, is seen as engaged and knowledgeable about the community they serve. They are the ‘go to’ for questions about serving the immigrant and broader Latino community, and they make themselves and their staff available. In other words, they are at the table, or should be, when it comes to decision making in the County.”

## 2) Partnerships and Collaboration

*Summary:* Twelve (12) Interviewees had direct experience of partnering with HUF and indicated positive results. Engagements were described as “thoughtful” “iterative” and “impactful” with a high degree of customization to ensure programs met stated needs. HUF’s disposition is always open, but also appropriately critical, “will this partnership/program yield the intended result?” The impression was that HUF often took leadership in the partner relationship, not at the expense of collaboration, but as the major driver for evaluating and ensuring impact.

“In terms of the service to students, they have always been responsive, and I feel like we have a true partnership, not just some mutually beneficial arrangement.”

“I have never felt like my time was wasted when working with HUF. I trust them, and they really want to see those they serve thrive.”

“We are honored to be invited to work alongside HUF. I can’t say that about all the organizations that my agency works with. HUF works hard to ensure that our time and effort is worth it. They have the relationships with the community, and the credibility to serve them.”

## 3) Perception of HUF’s Activities and Enterprise Areas

*Summary:* As alluded to above, the principal HUF activities were well known to most of the interviewees. The education, citizenship component and referral services were the most well-known. Within the major programs there was a high degree of confidence that HUF was delivering and performing well. However, there were two stand-out insights from most interviewees. 1) The potential client volume in each of the major program areas was significant, and many advocated for HUF’s continual growing and

2

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

strengthening of existing programs. 2) HUF can do a better job of communicating the successes and financial needs of these programs. In other words, advertising success and properly communicating the organization's financial need to continue or expand programs in demand.

“The focus on Economic empowerment and wealth/asset-building is important. They want to see the families they serve thrive.”

“I can think of 25-30 schools that would immediately benefit from having HUF either on campus or partnering with them. Why should schools re-create the wheel when HUF has a proven and working model.”

“Citizenship classes are a highlight worth mentioning. The idea that citizenship, a good job, and a strong family, are keys for success resonate with me and a lot of other donors.”

“Family services and approaches are a clear identifier of HUF's work. The Center for Working Families is a good example of the way that HUF operates intending transformation and lasting change.”

## 4) Social Capital, Trust and Community Standing

*Summary:* Overwhelmingly, interviewees mentioned the social capital that HUF has with the business and civic community. HUF was unique and strategically positioned as an effective immigrant serving organization that was non-political, but unafraid to take positions that benefitted their clientele and the community at large. Nine (9) interviewees were aware of the State of Hispanic and Immigrant Broward County report, and highlighted this as an indication of the standing in the community: “I don't know anyone else who would have had the capacity or the relationships necessary to do this.” Six (6) interviewees mentioned the ID card, and the important role that HUF played in advocating and dispelling myths associated with it.

“HUF is one of the few “trusted” Immigration service orgs.”

“HUF has the credibility, and probably the data, to take on a bigger advocacy role in policy, but it is a long game, and I think HUF understands that.”

“The general feel is that HUF is safe and credible. Not that they are timid, but that they are smart, especially in the political landscape in Florida.”

“They [HUF] could probably push a lot harder than they do in certain areas. They don't spend a lot of their social capital on controversial issues, but they could if needed. Especially when they have some data to explain their position.”

3

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

---

“HUF does a lot to dispel immigration “myths” of ‘they are taking our jobs’ and quantifying net, positive economic impact from immigrants.”

## 5) New Opportunities

*Summary:* Interviewees were relatively reserved on suggesting new opportunities or new program expansion. Most favored growing the existing programs that were addressing critical community needs, in education, economic development etc. Related to the community needs outlined below, two general opportunities were elevated by seven (7) of the interviewees and six (6), when prompted, agreed that these opportunities were likely a good fit for HUF. Generally, they can be summarized as more developed programs for:

- 1) Workforce Development (certificates with Broward College and local employer support)
  - a. Entry level skill provision and partnerships
  - b. Upskilling existing workforce
  - c. Certificate transferability from country of origin
  - d. Leadership development
  - e. Entrepreneurial training and support
- 2) Affordable Housing
  - a. Supply end partnerships
  - b. Step to home ownership programs
  - c. Enhanced Financial/Lending Programs
  - d. Rent rate policies/advocacy

“Given our current [economic] climate, one could expect things to get worse and more expensive. HUF should be thinking about housing programs, either with developers or the county, and helping candidates take the steps to get qualified, and helping the banks develop programs for affordable lending.”

“The income to housing gap is huge. HUF could be a part addressing this by doing more in workforce development with all the other parties who see this as a problem.”

“Upskilling in addition to providing entry level positions are critically important. Last time I checked we had about 25,000 unfilled jobs in the County.”

“Pathways to certificates that increase the value of labor, especially for those who may come here with an existing skill set or license.”

4

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

## 6) Community Needs – Affordable Housing

*Summary:* While some interviewees had more visibility into the current needs of the community, affordable housing was mentioned by every interviewee. All interviewees readily acknowledged that affordable housing is not a HUF service, but saw the Agency as possibly playing a role in alleviating this crucial issue. Those in the philanthropic segment saw the large gap in wage earning and housing cost as a key issue negatively impacting the working poor and marginalized and preventing or obfuscating efforts for wealth building and financial stability. The business stakeholders saw the housing affordability issue as negatively impacting workforce recruitment and retention, as well as increasing labor cost and therefore contributing to greater inflation. The municipal stakeholders saw the lack of affordable housing as a major issue impacting future growth. The public safety stakeholders saw the increased housing costs impacting occupant density, and other negative outcomes associated with increasing amounts of income going to housing costs. Other human service providers noted the long waiting lists for emergency and transitional housing (especially for recent arrival families).

“Affordable housing on the supply side, and financing side is the major issue impacting Broward County today.”

“20 years ago, the gap between avg. wage and median cost of avg. home meant that 42% of wage earners would have limited access to housing. Today, 92% of wage earners can’t afford an avg. house in the county.”

“Not to be overly dramatic, but the lack of affordable housing is going to negatively affect everyone, especially those who are already struggling.”

“Finding qualified and skilled employees is one component of the need, the other and perhaps equally if not more important, is having housing available that the workforce can afford.”

“Inflation is really hurting families, and for those who don’t have stable housing, the rent and purchase rates are quickly becoming the major factor we need to address.”

## 7) Community Needs – Workforce Development

*Summary:* While some interviewees had more visibility into the current needs of the community, workforce development was mentioned by nearly every interviewee. Those in the philanthropic stakeholders saw increasing the wage earning potential, and aligning skilled and capable workers with a heavily understaffed workforce, as a positive solution to increasing overall earning capacity. The business stakeholders saw workforce development as the major need to assist Broward County in continuing to diversify its workforce and recruit/retain major employers to a great business state level environment. The municipal stakeholders saw workforce as part of maintaining a healthy business

5

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

environment and tax base. The public safety stakeholders saw workforce development as a means to lower poverty and build up the community in general.

“We have everything needed to recruit businesses to Fort Lauderdale and the surrounding area, except a large, highly trained workforce. The good news is that Broward College is aware and rapidly taking steps to address this. This is an area that HUF could really make in impact in.”

“The tension for workforce development is real, and the volume needed will require an all-hands approach that could include certificates, 2-year, 4-year degrees, and quick upskilling programs.”

“HUF as an organization has incredible appeal. Help immigrants live out the American Dream by becoming engaged citizens and part of the stable workforce that will help our community continue to grow.”

“I suspect that HUF could help provide entry-level, mid-level and highly skilled workers for multiple industries. Some of these industries would even support the training and support HUF’s social services which help retain the workforce.”

“Better paying jobs might mean one parent at home, or more opportunities for kids, or better benefits which remove some pressures from the public safety-net systems.”

“There is not an issue of job availability, and probably not even one of having the labor force. It’s finding, training and aligning that labor force to the right industry.”

“SB 1718 may add new levels of complexity, and add unneeded pressures to an already stressed system. From my vantage point, SB 1718 is not needed in our county, people aren’t anti-immigrant, but they do want immigrants to be integrated into all the things we want for ourselves, good education, good jobs, good homes, stable families, etc. Broward has a history of the immigrants moving here wanting that for themselves.”

## 8) Community Needs – Education

*Summary:* Related to the above expressed needs in workforce development, several interviewees mentioned the need for improved education outcomes for children and additional parental support that to support parents as the “primary educators” “capable advocates” and “providing their family values” to their children. Several highlighted the benefit and impact of Unity4Kids and the desire for it to grow, as well as increasing the reach of the Unity4 middle and high schools. Multiple interviewees also highlighted the positive relationship with Broward College, and hoped to see that grow in specific programs for promising industries and certifications.



# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

---

“HUF has access to a pipeline of students that could continue on to incredible job training or degree programs. Not that a 4-year degree is not the ideal for everyone. HUF can be another conduit to employment, certificates, degrees, military or public service, etc.”

“The need in our public schools for tutoring and remediation is huge. Increasing support in these areas and finding more schools to partner with won’t be time wasted.”

“As a donor I know that education is important, and I see the work that HUF is doing. I think that they need to be more bullish about advertising and expanding those services elsewhere. Early childhood seems like a reasonable and cost-effective intervention that reduces “down-chain” needs and intervention.”

## 9) HUF Disposition and Strikingly Collaborative Environment

*Summary:* HUF was recognized as being a very client-centric organization whose CEO has no ego, welcomes frank conversations and is always seeking to improve its services and partnerships. Interviewees highlighted that Broward County is unique in having an environment that very collegial and collaborative. In addition to the high level of trust for HUF and the way it provides both referral and direct services, a cohesive approach was mentioned among multiple service organizations, along with meaningful integration with municipal services and private philanthropy and enterprises.

“I have done philanthropy in several major cities. There is nowhere more collaborative than Broward County. The alignment and openness is incredible. I don’t think we take advantage of this rare opportunity enough.”

# HUF Strategic Planning Insights: Stakeholder Interviews, Summary and Analysis

Hispanic Unity of Florida, Strategic Planning Process  
May 2023

---

## Interviewees:

1. Cindy Arenberg Seltzer, Pres./CEO, Children's Service Council of Broward County
2. Germaine Smith-Baugh, President, Urban League of Broward County
3. Beam Furr, County Commissioner, Broward County
4. Idelma Quintana, City Commissioner, Hollywood, FL
5. Beam Furr, City Commissioner, Previous City Manager, Hollywood FL
6. Clay Miller, Legislative Director, Hollywood FL
7. Kathleen Cannon, CEO, United Way of Broward
8. Maria Hernandez, Chief Program Officer, United Way of Broward
9. Kevin Byrne, Frederick A. DeLuca Foundation, Inc.
10. Ceci Rivas-Gonzales, Grants Manager, Frederick A. DeLuca Foundation, Inc.
11. Melanie Burgess, Executive Director, The Jim Moran Foundation
12. Carol Hylton, Pres./CEO, CareerSource Broward
13. Gregory Haile, President, Broward College
14. Lori Canning, Broward County Public Schools
15. Vicki Saldada, Broward County Public Schools
16. Shawn Aycock, Principal, Pembroke Pines Middle School
17. Robin Rorapaugh, Director of Government Affairs, Sherriff's Office, Broward County
18. Bob Swindell, Greater Ft. Lauderdale Alliance
19. Marla Bilonick, Pres./CEO, National Association for Latino Community Asset Builders
20. Marie Paule Woodson, House of Representatives, State of Florida
21. Bob Taylor, CEO, BBI
22. Kenny Tate, Co-Founder, Tate Capital
23. Randolph (Randy) McGroarty, Executive Director, Catholic Legal Services, Archdiocese of Miami
24. Josie Bacallao, Former CEO of Hispanic Unity of Florida

## 2023 STRATEGIC PLANNING AND VISION

### STAFF FEEDBACK

On February 17, during the Strategic Planning session that took place at Hispanic Unity of Florida's (HUF) 2023 Agency Retreat, 75+ staff members worked in groups of 8-10 participants to discuss the following topics:

- **Is anything preventing you from doing your job better?**
- **Do you think any of the things we do at HUF are unsustainable? Are others doing it better?**

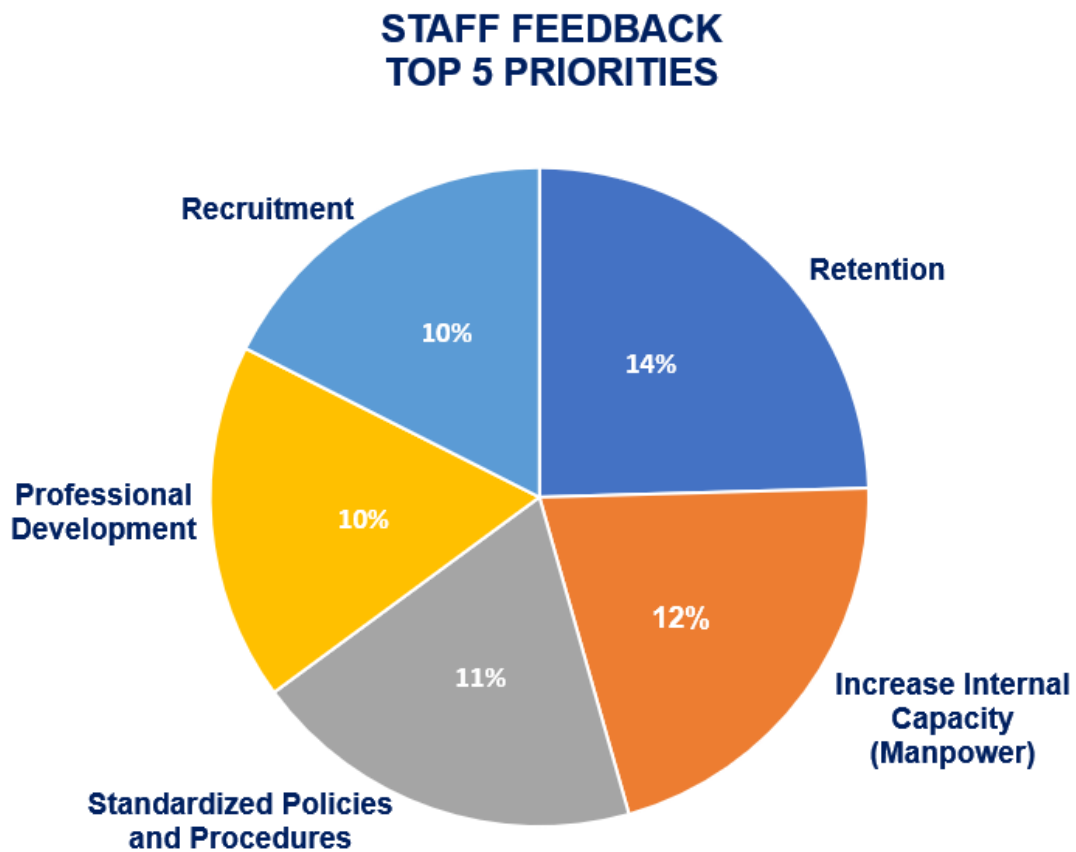
At the end of the session, the staff members received a QR code to access an anonymous survey that allowed them to answer the question: **“Is there anything additional you would like to share with us?”**. This question was intended to complement the strategic planning session.

Below is a recap of the 23 topics mentioned by the staff:

1. **Professional development**
2. **Recruitment**
3. **Retention**
4. **Internal capacity (manpower)**
5. Wellbeing
6. Hybrid work policy
7. Networking opportunities
8. **Standardized policies and procedures**
9. Facilities
10. Internal communication
11. Branding
12. External community resources handbook
13. External referrals (follow-up)
14. Internal community resources handbook
15. Multiple tracks for clients
16. Mental health services
17. Strengthening partnerships
18. Need of bilingual forms and documents
19. Online expansion
20. Expanding unrestricted funding
21. Centralized Data Management System
22. Technology and tools
23. Evaluation process

During April's Agency meeting, the staff received an anonymous survey to prioritize these topics. It was requested that they selected the top 5 topics that were most important to them and that they believed should be addressed first.

The graphic below shows the topics selected by 42 staff members.



# HUF Strategic Planning Insights: CEO Assessment

Hispanic Unity of Florida, Strategic Planning Process  
August 2023

---

*In preparation for the Strategic Planning Meeting #3, VeraCruz Advisory asked Felipe Pinzon (CEO) to provide an assessment of current needs from his vantage point to be incorporated alongside the other data sets from staff, clients, board, and stakeholders. Below is a summary of the key areas his internal assessment identified.*

## **1. Community Needs**

- a. Household income – Low
- b. Housing – Unaffordable
- c. Academic Achievement – Behind
- d. Health – Difficult access

## **2. Strategic partnerships**

- a. Growing & managing strategic partnerships

## **3. Funding**

- a. Securing and diversifying funding
- b. Individual giving
  - i. Donor management
- c. State Funding
- d. Ensuring compliance with large grants

## **4. Advocacy capabilities**

- a. Addressing restrictive state policies
- b. Build coalitions!

## **5. Talent**

- a. Recruiting and hiring
- b. Retention
- c. Succession planning

1

# HUF Strategic Planning Insights: CEO Assessment

Hispanic Unity of Florida, Strategic Planning Process  
August 2023

---

- d. Transitioning Leadership
- e. Staff training and development
  - i. Talent development and management

## 6. Operations

- a. Reinforce internal systems and operations to ensure organization's long-term cultural and financial sustainability.
- b. Integration of digital tools/technology – efficiency

## 7. Marketing and communications

- a. Increase visibility
- b. Negative media / deficit-based narratives about the immigrant community
- c. Shift narratives and public perceptions to elevate the assets of the immigrant community.

## 8. Data Driven

- a. Data collection and analysis/outcome evaluation and measurement
- b. Data to inform and improve practices.
- c. Reporting

## 9. Board

- a. Increase diversity
- b. Succession planning
- c. Fund development
- d. Committees

# HUF Strategic Planning: Marketing Plan

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

Collaboration with other committees & CEO

Gather information based on the surveys & data

Identify HUF Values, Objectives and Mission Statement

Find a new narrative tailored to the key stakeholders and audiences

B2C – Clients  
(Primary Beneficiaries)

Community  
(Secondary Beneficiaries)

Donors/Funders  
(Core Partners)

Staff and Volunteer  
(Collaborators)

Influencers  
(Media & PP&A)

Messaging - Identify what to say and how to say it

Content Strategy: Planning, creation, maintenance and publishing  
(action plan that will take us where we want to go)

Tactics (individual steps and actions)

B2C – Clients  
(Primary Beneficiaries)

Community  
(Secondary Beneficiaries)

Donors/Funders  
(Core Partners)

Staff and Volunteer  
(Collaborators)

Influencers  
(Media & PP&A)



# Key stakeholders and audiences

---

B2C – Clients  
(Primary Beneficiaries)

**Who we serve:** Immigrant individuals and/or families who need resources and education to ease the acculturation process of being in a new country.

---

Community  
(Secondary Beneficiaries)

**Additional individuals we also impact with our work:** underserved families and individual who may not be new to the country but are struggling with the basic needs such as access to food and shelter.

---

Donors/Funders  
(Core Partners)

**Who provides opportunities to us and join/co-lead our efforts by providing funding and partnerships:** Affiliates, other organizations, private individuals, corporations

---

Staff and Volunteer  
(Collaborators)

**Who we work with to provide services and programs**

---

Influencers  
(Media & PP&A)

**Who we can work with to influence, change perspective, change policies:** Policy-makers, private and public decision-makers, media networks

# HUF Strategic Planning: Financial-Operating Model

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

## *Financial-Operating Model*

The Model enables HUF to look at its historical performance and forecast its future performance based on those historical trends and experiences. Using the Model enables management to monitor HUF's operations, and to help highlight Organizational performance areas for the Board and SPC. Using the Model also helps identify financial areas where HUF may have opportunities to improve, such as revenue source diversification and increasing unrestricted cash reserves.

In addition, this Model can be used to forecast and, ultimately, track the financial impact of the Strategic Plan Goals and Objectives. This forecasting includes the expected new personnel, marketing, development, operating, and occupancy expenses required to implement the Plan along with any associated revenues. The exercise of thinking through these financial scenarios provides the further benefit of line level buy-in and knowledge by having program level team members think through the assumptions, and the associated organizational gaps and synergies. By forecasting the expected financial impact timing for each Objective, HUF is able to better prioritize Objectives, determine their timing, and more clearly understand any dependencies.

With the forecasting initially completed, the financial-operating model will be updated periodically to compare the actual revenues, expenses, and impact to this original forecast. Model maintenance will enable management to understand the situational dynamics, adjust the implementation tactics, and correct forecasting if warranted. This new learning can be provided to both the line units and the Board.

The financial-operating model is broken into five main sections.

1. Assumptions: These inputs drive the Model projections via trend assumptions (based off of comparison to historical trends) by the major HUF departments (i.e., Civic Engagement, Education, Economic Development and Management & General and Fundraising). This tab also includes the ability to include/add new revenues and expenses outside of the historical departments and trends.
2. New Revenues and Expenses: Summarizes the non-trend assumptions and is used to bring greater clarity to the Strategic Plan-related initiatives' impact.
3. Annual Dashboard: Provides a visualization of the Model projections, and may be used with the Board, major donors, or stakeholders for reporting purposes.
4. Income Statement and Balance Sheet: Provides overall HUF historical and projected financial statements based on assumptions and built off of departmental income statements enabling management to see the projected performance of HUF as a whole.
5. Departmental Income Statements (Civic Engagement, Education, Economic Development, and M&G and Fundraising): Historical and projected income statements for each of the main departments driven off of the Assumptions tab enabling HUF's management to see the projected performance of each department.

# HUF Strategic Planning: Financial-Operating Model

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

Model sections are designed to enable HUF to understand the impact of each Strategic Planning Objective, while not losing sight of the performance of the whole department nor that of the entire Organization.

The Model is not meant to project exactly what the next five years will look like, rather, it is meant to help HUF better understand program-service dynamics and highlight certain assumptions and timing. This intentional and time-bound discussion and review by Departments or activity is the major value of the Model. In other words, it creates a framework for specific discussion of revenues, expenses, and timing assumptions, by Department and Objective responsible party.

# HUF Strategic Planning Process: Committees

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

## Strategic Planning Committee Members

<i>Name</i>	<i>Position</i>
Christina Paradowski	Chair Board of Directors
Lisette Rodriguez	Treasurer Board of Directors
Anthony Abbate	Chair-Elect Board of Directors
Lucia Rodriguez	Past-Chair Board of Directors
Carolina Cardozo	Secretary Board of Directors
Boris Espinoza	Board of Directors Member
Dr. Jeffrey Nasse	Board of Directors Member
Maritza Alvarez	Board of Directors Member
Francisco Rivera	Board of Directors Member
Felipe Pinzon	CEO
Juliana Esguerra	Director of Evaluation and Innovation

## Programs and Advocacy Committee

<i>Name</i>	<i>Position</i>
Dr. Jeffrey Nasse	Board of Directors Member
Carolina Cardozo	Secretary Board of Directors
Tim Curtin	Executive Director, Community Services, MHS
Angelika Schlanger	Executive Director, The McKnight Brain Research
Ron Moffett	Foundation Executive Vice President, CareerSource Broward
Elizabeth Dorante	Vice President of Programs
Otayme "Otto" Valenzuela	Associate Director, PP&A
Shani Wilson	Vice President of Development
Magaly Alvarado	Director, Civic Engagement
Eduardo Pineda	Director, Economic Development
Yonela Carusi	Director, Education

# HUF Strategic Planning Process: Committees

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

## Finance Committee Members

<i>Name</i>	<i>Position</i>
Lisette Rodriguez	Finance Committee Chair / BOD Treasurer
Alejandro Alvarez Loscher	Finance Committee Member
Arnold E. Nazur	Finance Committee Member
Christian Reyes	Finance Committee Member / BOD Member
Dan Herz	Audit Committee Member / BOD Member
Myrna Monserrat	Finance Committee Member
Rodney Bacher	Finance Committee Member
Leonor Romero	CFO
Shani Wilson	Vice President of Development
Elizabeth Dorante	Vice President of Programs
Juliana Esguerra	Director of Evaluation and Innovation

## Governance Committee Members

<b>Name</b>	<b>Position</b>
Lisette Rodriguez	Finance Committee Chair / BOD Treasurer
Alejandro Alvarez Loscher	Finance Committee Member
Arnold E. Nazur	Finance Committee Member
Christian Reyes	Finance Committee Member / BOD Member
Dan Herz	Audit Committee Member / BOD Member
Myrna Monserrat	Finance Committee Member
Rodney Bacher	Finance Committee Member
Leonor Romero	CFO
Shani Wilson	Vice President of Development
Elizabeth Dorante	Vice President of Programs
Juliana Esguerra	Director of Evaluation and Innovation

# HUF Strategic Planning Process: Committees

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

## Development Committee Members

<i>Name</i>	<i>Position</i>
Christina Paradowski	Board of Directors Chair
Boris Espinoza	Board of Directors Member
Jessica K. Rodriguez	Cloud Nine Nonprofit Advisors
Felipe Pinzon	President/CEO
Shani Wilson	Vice President of Development

## Marketing Committee Members

<i>Name</i>	<i>Position</i>
Francisco Rivera	Marketing Committee Chair / BOD Member
Boris Espinoza	Marketing Committee Member / BOD Member
Christopher Dongo	Marketing Committee Member
Lucia Rodriguez	Marketing Committee Member / BOD Past-Chair
Henry Rojas	Marketing Committee Member
Lesli Cartaya Franco	Marketing Committee Member / BOD Member
Maguana Jean	Marketing Committee Member
Elsa Bittar	Marketing Committee Member / BOD Member
Alexandra Palau	Guest
Anthony Santana	Guest
Kathy Gallego	Director of Marketing
Maggie Martinez	Development and Marketing Associate

## Operations Committee Members

<i>Name</i>	<i>Position</i>
Maritza Alvarez	Board of Directors Member
Maria Elena Gurdian	Guest
Elizabeth Dorante	Vice President of Programs
Ingrid Ekblad	Director of Operations
Juliana Esguerra	Director of Evaluation and Innovation
Luz Eliana Avila	IT Coordinator
Paola Barroeta	Operations and Facilities Assistant
Shazida Singh	HR Support & AP Specialist

3

# HUF Strategic Planning Process: Committees

Hispanic Unity of Florida, Strategic Planning Process  
2023

---

## Programs Committee Members

<i>Name</i>	<i>Position</i>
Ana Rodriguez	BOD Member
Steve Sampier	BOD Member Emeritus
Elizabeth Dorante	Vice President of Programs
Magaly Alvarado	Director of Civic Engagement
Yonela Carusi	Director of Education
Eduardo Pineda	Director of Economic Development
Juliana Esguerra	Director of Evaluation and Innovation
Shani Wilson	Vice President of Development
Tim Dwyer	Senior Grants Manager
Ingrid Ekblad	Director of Operations

## Public Policy and Advocacy Committee Members

<i>Name</i>	<i>Position</i>
Carolina Cardozo	PP&A Committee Chair / BOD Member
Dr. Jeffrey Nasse	PP&A Committee Member / BOD Member
Dan Schevis	PP&A Committee Member / BOD Member
Dick Blattner	PP&A Committee Member
Kersti Myles	PP&A Committee Member
Maggie Zalamea	PP&A Committee Member
Maria E. Bernal	PP&A Committee Member
Megan Turetsky	PP&A Committee Member
Nazbi Chowdhury	PP&A Committee Member
Nicholas Hessing	PP&A Committee Member
Felipe Pinzon	President/CEO
Otto Valenzuela	Associate Director, Public Policy and Advocacy

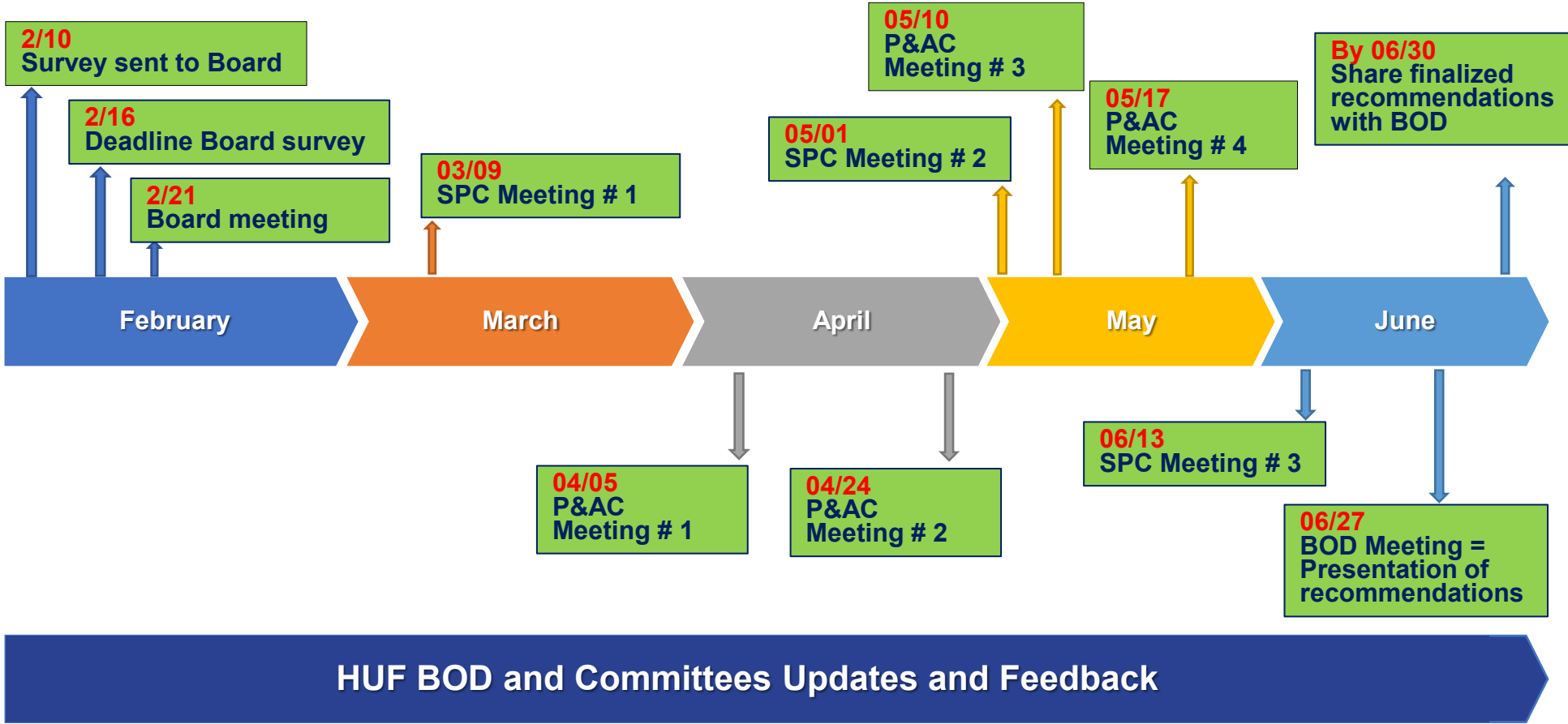


Empowering a New Generation of Americans

# Strategic Planning Timeline



Helping Not-For-Profits Fulfill Their Mission





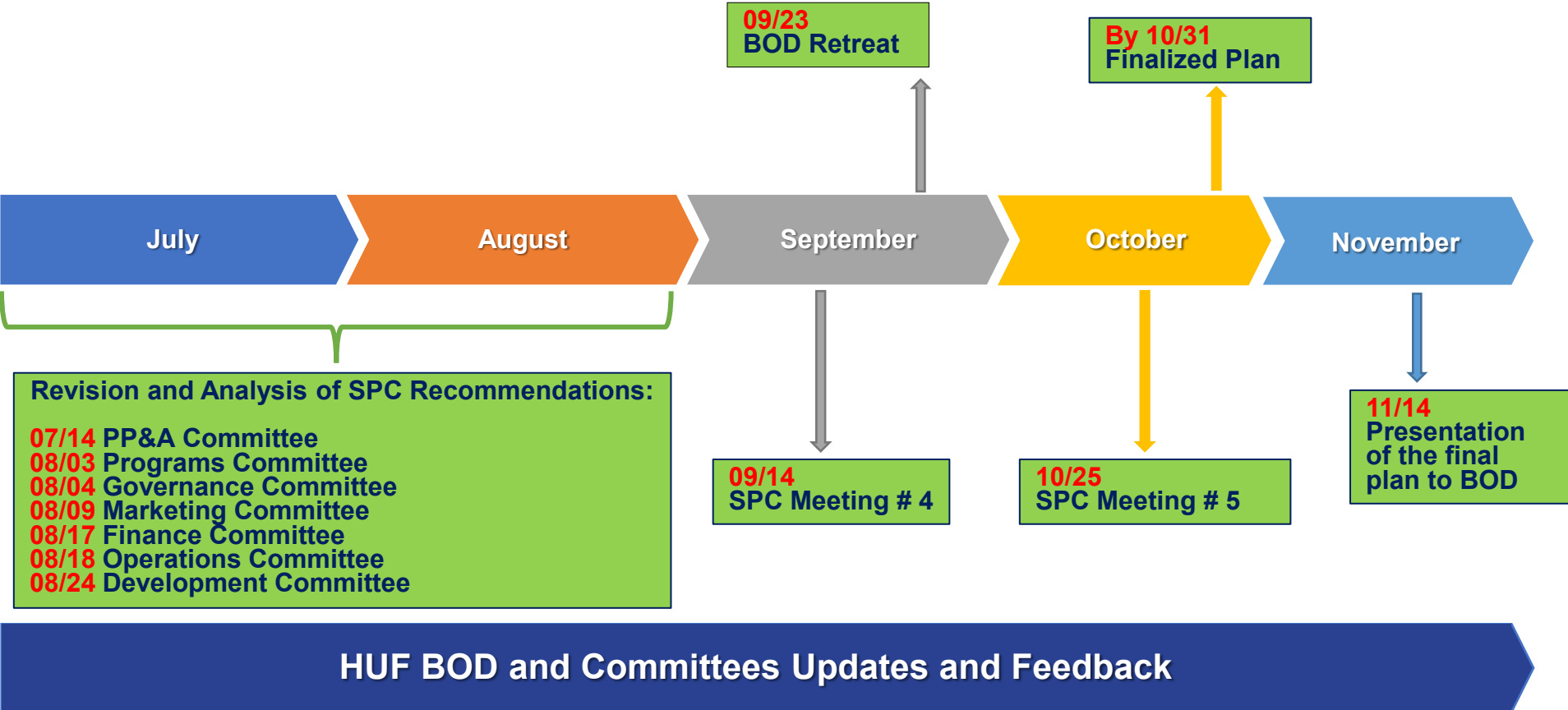


Empowering a New Generation of Americans

# Strategic Planning Timeline



Helping Not-For-Profits Fulfill Their Mission



- Revision and Analysis of SPC Recommendations:**
- 07/14 PP&A Committee
  - 08/03 Programs Committee
  - 08/04 Governance Committee
  - 08/09 Marketing Committee
  - 08/17 Finance Committee
  - 08/18 Operations Committee
  - 08/24 Development Committee

## VeraCruz Team Summary Bios

### **Carlos R. de Quesada, Managing Member & Founder, VeraCruz Advisory, LLC**

Continuing his 25+ years of business, managerial and consulting work, in October 2011, Carlos founded VeraCruz to focus on providing financial advisory and strategic consulting services to non-profit institutions. Prior to this and from 2007-2011, Carlos was a Managing Director for a financial advisory and business practice consulting firm that served non-profit and faith-based entities including human service organizations, higher education institutions, healthcare facilities, dioceses, foundations-endowments, and high schools. During these four years, Carlos led the origination, structuring and closing of more than \$500MM in financings and interest rate derivatives for NFP clients across seven states.

Prior to working with NFPs Carlos was a Vice President and minority shareholder (2005-2007) at the fastest growing Hispanic-owned energy retailing company in the U.S. Prior to pursuing his initial entrepreneurial path Mr. de Quesada had 11 years of New York City-based international banking experience with domestic and international institutions including Citigroup, Calyon (of France), and UBS (of Switzerland).

Carlos graduated from the Florida State University in 1987 with a Bachelor's of Science degree in Finance. He served as an officer in the U.S. Marine Corps from 1988-1991 with duty stations and deployments to Japan (Okinawa), South Korea, the Marianna Islands, Honduras, and the Persian Gulf. Following his military service, Carlos earned an M.B.A. in 1993 from the George Washington University in Washington, D.C.

He has served in volunteering activities with not-for-profits including the American Bible Society's Latino Advisory Council, Goodwill Manasota Ambassadors, and other national and local organizations. From December 2011-2014, Carlos accepted an invitation to serve on the Catholic Charities Board of Venice, Florida. Current pro bono board service is with a Miami-based human services non-profit, CNC (<http://cnc.org/>), the Catholic Campus Minister Association, ([www.ccmanetwork.org](http://www.ccmanetwork.org)), Seton Education Partners (<https://www.setonpartners.org/>), and the Sarasota Bay Park Conservancy (<https://www.thebaysarasota.org/>).

Through VeraCruz Advisory, Carlos has been a Trustee level member of the Sarasota Chamber of Commerce. In April 2015, Carlos completed the Gulf Coast Community Foundation-hosted BoardSource® NFP board governance training and is now part of the GCCF's, Invest in Incredible, 15-consultant cohort. Also locally, Carlos serves or has served on his neighborhood board association, a Sarasota public district school youth mentoring program and on his parish finance council. Born and raised in Miami, Florida,

Carlos is a first generation American of Cuban parents and is bilingual (English-Spanish). Though traveling nationally, Carlos resides in Bradenton, Florida with his wife, Cynthia, of 31 years and two adult children.

### **Daniel Flanagan, Principal**

During his consulting and finance career, Daniel Flanagan has worked extensively and almost exclusively with non-profit organizations. In this role, he and Carlos de Quesada have been working together for more than 15 years performing strategic consulting, organizational assessments, financial transaction structuring and execution and other engagements for a range of faith-based, membership, community and national organizations. Many of these NFP client organizations operate, own or have relationships with higher education institutions. Dan has also led the credit process for more than \$400 million in bond and bank debt issued by higher education institutions and other NFPs.

Prior to working with VeraCruz Advisory starting in September 2012, Dan was the senior analyst for a financial advisory boutique that focused on faith-based entities including Catholic dioceses, schools, and higher education institutions. In that position, he performed project management and led the analysis and financial modeling on a wide variety of consulting and financing projects. In addition to his client facing roles, Dan was responsible for training analysts in financial modeling, statistical analysis, and other technical skills needed by many non-profit organizations.

Before working with not-for-profit institutions, Dan worked at Flagstar Bank in the management development program, where he assisted in management of retail branches. Dan served in the U.S. Army Reserves as a Sergeant in the 961st Engineering Battalion. During military his service, he was deployed (2003-2005) with the 488th Engineering Battalion in support of Operation Iraqi Freedom.

Dan has served on the finance committee of Catholic Campus Ministers Association ([www.ccmnetwork.org](http://www.ccmnetwork.org)), a national network and training organization for campus ministers, and is currently serving on the finance committee of Mary's Mantle ([www.marysmantle.net](http://www.marysmantle.net)), a housing provider for expectant mothers. In these volunteer roles, Dan helps the entities think through strategic issues and develop meaningful data for decision making.

Dan obtained his M.B.A. from the University of Michigan in 2015 with high distinction and earned membership into Beta Gamma Sigma. He also holds University of Michigan B.S. in Economics (2007). While traveling nationally, he resides in Ann Arbor, Michigan, with his wife and children.

## **Ryan Hanning, Ph.D., Education Consultant**

Ryan Hanning is a consultant, public speaker and Professor of Theology and Catholic Studies serving the University of Mary Liffrig School of Education, and Franciscan University of Steubenville Catechetical Institute. Prior, he led the operational and administrative aspects of the University of Mary's unprecedented partnership with Arizona State University serving hundreds of students on multiple campuses in two states. He continues to consult for several universities, international charities and Latino serving non-profits. Ryan is focused on transferring his classroom and teaching experience to practical application for primary, secondary, and higher education clients across the U.S. Specifically, Ryan concentrates on several educational segments including enhancing continuing professional education for teachers/administrators, better understanding parent and stakeholder demand, testing and assessment design and evaluation, appropriate pedagogical selection, and how to form teachers and administrators in the tradition of Classical education. Ryan's research into learning outcomes and interventions for at-risk students has led to his conversance with multiple models of data acquisition and analysis, including objective interview and survey design, implementation, and analysis. He has worked with 30 primary and secondary schools and 12 universities over the course of 20 years, Ryan can quickly assess situations across a range of educational organizations.

Dr. Hanning has extensive experience in Catholic and private religious organizations and universities and in-depth knowledge of Church operations, canon law and theology, as well as public education. He directed the Department of Family Catechesis, Diocese of Phoenix, under Bishop Olmsted, worked internationally with Catholics Come Home and the Virtuous Leadership Institute, served as director and chairman for Aid to Women Center, a crisis pregnancy medical clinic and was a founding member of Catholic Leadership Circle and Caritas in Veritate International. He earned a Ph.D. in Theology from Maryvale Institute Liverpool Hope University in England, a Masters in Educational Leadership from Northern Arizona University, a Bachelor of Arts in Religious Studies at ASU and has studied at University of Dallas, Cambridge, and the Jagiellonian in Krakow, Poland. He is a Fellow of the Harvard Virtuous Leadership Institute and the San Juan Diego Institute and a member of the Royal Historic Society in England, American Catholic Historical Association and Fellowship of Catholic Scholars.

His publications include a broad range of academic papers, articles, as well as recent white papers focused on Learning Losses and Remediation in K-12 Education. In addition to teaching and consulting, he writes and speaks internationally on education, virtue and ecology. His book, *The Will Power Advantage: Building Habits for Lasting Happiness* was published through Ignatius Press in the fall of 2020. Though traveling nationally for his work, Ryan currently homesteads in Tennessee with his wife Rebecca, and their children.

**BY-LAWS  
HISPANIC UNITY OF FLORIDA, INC.**

**AS AMENDED AND APPROVED ON DECEMBER 12, 2022**

## **Table of Contents**

ARTICLE I: NAME .....	1
ARTICLE II: PLACE OF BUSINESS .....	1
ARTICLE III: MISSION STATEMENT .....	1
ARTICLE IV: BOARD OF DIRECTORS .....	1
a. Function .....	1
b. Operation.....	1
c. Number .....	1
d. Nominations/Elections/Terms.....	1
1. Nominations.....	1
2. Vacancies .....	2
3. Election and Tenure .....	2
4. Removal of Officers and/or Members of the Board of Directors .....	2
5. Resignation of Officers and/or Members of the Board of Directors .....	3
6. Diversified Membership .....	3
7. Personal Nature of Board Membership.....	3
e. Board of Directors Member Job Description.....	3
f. Minimum Annual Gift .....	4
g. Board Member Emeritus.....	4
1. Eligibility .....	4
2. Minimum Qualifications.....	5
3. Nomination .....	5
4. Benefits and Rights.....	5
5. No Voting Rights .....	5
6. Annual Contribution .....	5
7. Removal .....	6
h. Conflicts of Interest.....	6
i. Board Meetings.....	7
1. Scheduling of Meetings .....	7
2. Annual Meeting .....	7
3. Special Meetings.....	7
j. Attendance at Meetings.....	7
ARTICLE V: VOTING BY THE BOARD AND COMMITTEE MEMBERS.....	7

a.	Rules Governing Voting .....	7
1.	One Vote .....	8
2.	Quorum .....	8
3.	Number of Affirmative Votes Required .....	8
4.	Proxy Voting.....	8
5.	Secret Ballot.....	8
6.	Voting by Alternative Method.....	8
	ARTICLE VI: OFFICERS OF THE CORPORATION’S BOARD.....	9
a.	Non-Employee Officers of the Corporation’s Board.....	9
1.	Election and Tenure .....	9
2.	Vacancies .....	9
3.	Two-Year Option .....	9
b.	Duties and Powers of the Non-Employee Officers of the Corporation’s Board.....	10
1.	Board Chair.....	10
2.	Chair-Elect .....	11
3.	Secretary .....	12
4.	Treasurer .....	12
5.	Immediate Past-Chair.....	13
	ARTICLE VII: EMPLOYEE OFFICERS OF THE CORPORATION.....	14
a.	Employee Officers of the Corporation.....	14
1.	Chief Executive Officer/President .....	14
	ARTICLE VIII: COMMITTEES.....	14
a.	Designation of Committees.....	14
b.	Standing Committees .....	14
1.	Executive Committee.....	14
2.	Finance Committee .....	15
3.	Audit Committee.....	15
4.	Governance Committee .....	15
5.	Marketing Committee .....	16
6.	Public Policy and Advocacy Committee .....	16
c.	Ad-hoc Committees .....	16
	ARTICLE IX: CHECKS, NOTES, AND DRAFTS.....	17
	ARTICLE XI: BY-LAWS .....	17
	ARTICLE XII: NON PROFIT ORGANIZATION .....	17

ARTICLE XIII: EMPLOYEES OF THE CORPORATION..... 17  
ARTICLE XIV: GRIEVANCE PROCESS..... 17  
ARTICLE XV: CONFIDENTIALITY..... 18  
ARTICLE XVI: RULES OF ORDER..... 18  
ARTICLE XVII: INDEMNIFICATION..... 18



**BY-LAWS FOR HISPANIC UNITY OF FLORIDA, INC.  
AS AMENDED AND APPROVED ON, 2022**

**ARTICLE I: NAME**

The name of the corporation shall be Hispanic Unity of Florida, Inc., (referred to herein as the “Corporation”). The Corporation may, at times, be referred to by the acronym “HUF”.

**ARTICLE II: PLACE OF BUSINESS**

The corporate office of the Corporation shall be located at 5840 Johnson Street, Hollywood, Florida 333021, or such other location as may be established from time to time by the Board.

**ARTICLE III: MISSION STATEMENT**

Empowering immigrants and others to become self-sufficient, productive, and civically engaged.

**ARTICLE IV: BOARD OF DIRECTORS**

**a. Function**

The Board of Directors (the “Board”) shall have and exercise all corporate powers necessary to manage the business and affairs of the Corporation, with the authority to delegate certain administrative and Executive functions to paid employees of the Corporation.

**b. Operation**

The Board shall be responsible for the operation, development, and maintenance of the Corporation in accordance with the requirements for exemption from federal taxation under the current section 501(c)(3) of the Internal Revenue Code, or as amended.

**c. Number**

The Board shall be comprised of a maximum of twenty-one (21) elected directors (“Directors” or “Board members”) that are to be nominated and elected to the Board in accordance with these By-Laws. The maximum number of elected directors may be increased or decreased from time to time by amendment to these By-Laws. Said increase or decrease must be consistent with any applicable law, and no decrease in the number of elected directors shall have the effect of shortening the terms of any incumbent elected directors or having the effect of removing any directors.

**d. Nominations/Elections/Terms**

**1. Nominations**

As vacancies on the Board exist or may occur, any Director, or the CEO or Executive

Director (as defined in Article VII, below) may submit to the Governance Committee names for consideration to fill the vacancy. Members of the Governance Committee will interview potential candidates, explain the operations of the Corporation, and inform candidates of the obligations and duties of a Director. The Chair of the Governance Committee or his/her/their designee can present to the Board candidates for election to the Board at any regular or special Board meeting.

## **2. Vacancies**

Should an elected member of the Board not complete an elected term, then that position on the Board as an elected director shall be considered as vacant.

## **3. Election and Tenure**

Each Director shall be elected by a vote of the then-existing Board in accordance with the voting procedures set forth in these By-Laws. Such election shall ordinarily be held based upon the nominations provided by the Governance Committee.

Directors shall be elected for an initial term of one year. If a Director is elected to the Board anytime on or between January 1 to June 30, then such calendar year will be considered as the Director's "first year." If a Director is elected to the Board anytime on or between July 1 and December 31, then the following calendar year will be considered as the Director's "first year." At the conclusion of the first year as a member of the Board, a Director shall be eligible to be elected for a second term of two year, unless removed from office as herein provided or said Director resigns. At the conclusion of the second term as a member of the Board, a Director shall be eligible to be elected for a third term of three years, unless removed from office as herein provided or said Director resigns.

No person shall serve as an elected director from more than three consecutive terms totaling six years, with the exception of the current, Immediate Past Chair, current Board Chair, and/or current Board Chair-Elect, who may have served three consecutive terms totaling six years on the Board, but who have not completed their term as Immediate Past Chair, Board Chair, and/or Board Chair-Elect. In such instance, the current Immediate Past Chair, current Board Chair, and/or current Board Chair-Elect shall remain as a Director until the end of their term as Immediate Past Chair or until such time as they are removed or resign from the Board, whichever shall come first as the case may be.

An elected Director who has served three consecutive terms shall not be eligible for re-election until one year after the expiration of such Director's final term. The Board may, by unanimous vote, modify the above term limit on an individual basis and extend the term of an elected Director if she/he/they is on a critical committee, or if the Board feels that the extension is necessary to benefit the Corporation. The extension may be made in one-year increments not to exceed a total of two years in an extended status.

## **4. Removal of Officers and/or Members of the Board of Directors**

Any elected Director of the Board may be removed from office by the Board, whenever in

its judgment the best interest of the Corporation would be served thereby including, without limitation, any of the following:

- (a) Conviction of a felony;
- (b) Abuse of power;
- (c) Any act which, in the best judgment of the Board is detrimental to the Corporation or the community; or
- (d) Unauthorized representation of the Corporation without proper authorization by the Board.

Such removal shall be by vote of two-thirds of the then-serving elected Directors, excluding the Director who is the subject of the removal vote. The Director subject to a removal vote shall be notified in writing of such action and will be given the opportunity to defend himself/herself/themselves and/or present additional evidence in his/her/their defense within ten days after the date of the written notification. After the Director has presented his/her/their case, a decision shall be made by the Board within ten business days after the meeting at which the presentation was made.

#### **5. Resignation of Officers and/or Members of the Board of Directors**

Any elected Director of the Board may resign by submitting written notice to the Board. A Director resigning may re-apply to the Board at any time provided such Director was in good standing at the time of his/her/their resignation.

#### **6. Diversified Membership**

The membership of the Board of Directors should be fully reflective of the community it serves.

#### **7. Personal Nature of Board Membership**

Membership on the Board of Directors is the personal membership of the individual, and not of a corporation or entity that employs the individual.

#### **e. Board of Directors Member Job Description**

The duties and functions of each elected member of the Board shall include, without limitation, the following:

- Promote the Corporation's mission and purpose;
- Select the Chief Executive if and when needed as a result of the removal, resignation, or death of the current Chief Executive;

- Support the Chief Executive and assess his/her/their performance;
- Actively participate in the creation and implementation of the Corporation's strategic plan;
- Meet Director scorecard commitments, including the minimum annual financial gift;
- Ensure adequate resources through fund development and appropriate budgeting;
- Serve on a standing Board committee;
- Support, monitor, and strengthen the Corporation's programs and services;
- Enhance the Corporation's public standing;
- Ensure legal, fiscal, and ethical integrity and maintain accountability;
- Recruit *diverse* Board members, welcome and provide mentorship to new members as necessary or appropriate; and
- Assess self and Board performance.

**f. Minimum Annual Gift**

Each elected member of the Board shall be required to make a minimum annual gift to the Corporation in such amount as determined from time to time by a majority of the Board. The minimum annual gift to the Corporation shall be payable on or before March 31 of each calendar year. Any individual who is elected to and joins the Board between July to December may make the minimum annual gift to the Corporation, but shall not be required to do so until his/her/their first year on the Board as set forth above.

Notwithstanding this provision, the Corporation and/or a majority vote of the Executive Committee may elect to waive the gift requirement for any given year if, in the discretion of the Corporation and/or Executive Committee, such waiver is warranted due to a prolonged national emergency or natural, economic, or health disaster.

**g. Board Member Emeritus**

Board Member Emeritus is the highest honor bestowed by the Corporation's Board to a former Board member who has made extensive contributions to the Corporation over the life of their service to the Corporation.

**1. Eligibility**

All Board members who meet the minimum qualifications listed below shall be eligible for consideration as a Board Member Emeritus, provided there is a history of that Board member's contributions to the Corporation for consideration by then-existing Board of Directors.

## **2. Minimum Qualifications**

The minimum qualifications for a Board Member Emeritus shall be:

- (a) Tenure on the Board for a minimum of six (6) years, with no less than a one-year term as Board Chair. Service as Board Chair can be waived by a majority vote of the Board.
- (b) Nomination for Board Member Emeritus – A Board member shall be nominated by the Governance Committee for consideration as a Board Member Emeritus.
- (c) The nomination for consideration shall include a detailed description: (1) of the reason(s) why the nominee's service to the Corporation should be recognized, and how the nominee's service is distinguishable from the service of other Board members whose terms have ended, and (2) why the Corporation should continue to have an association with the nominee.

## **3. Nomination**

The nomination shall be presented to the Board at a meeting by the Chair of the Governance Committee for consideration and vote.

## **4. Benefits and Rights**

The benefits and rights bestowed upon a Board Member Emeritus include, without limitation:

- (a) Invitation to all special events of the Corporation;
- (b) Lifetime membership to the Corporation with recognition on the Corporation's website; and
- (c) The right to attend regular meetings of the Board of Directors of the Corporation.

## **5. No Voting Rights**

A Board Member Emeritus shall not have the right to vote at Board meetings.

## **6. Annual Contribution**

A Board Member Emeritus shall not be required to make a minimum annual contribution to the Corporation. Notwithstanding this, if, in accordance with the nomination and voting procedures as stated in these By-Laws, a Board Member Emeritus returns to the Board as a Director with full voting rights, then such Board Member Emeritus shall be responsible for adhering to all obligations and duties of active Directors, including but not limited to, the requirement to make a minimum annual contribution to the Corporation.

## **7. Removal**

A Board Member Emeritus may be removed as a Board Member Emeritus by a vote of two-thirds of the members of the then-existing Board for cause, including, without limitation, any of the following:

- (a) Conviction of a felony;
- (b) Abuse of power;
- (c) Any act which, in the best judgment of the Board is detrimental to the Corporation or the community; or
- (d) Unauthorized representation of the Corporation without proper authorization by the Board.

## **h. Conflicts of Interest**

Directors shall serve voluntarily and in the best interest of the Corporation. In the event that a Director is directly related to an employee of the Corporation either by marriage or by family, said Director must abstain from voting on all issues that relate to said employee. Any and all decisions and/or discussions pertaining to these or any other issues must be kept in the strictest of confidence by all Directors. Each Board Member shall read and sign a form agreeing to abide by the following Conflict of Interest Policy:

### ***Conflict of Interest Policy***

*The standard of behavior at Hispanic Unity of Florida (HUF) is that all staff, volunteers, Committee Members, and Board Members scrupulously avoid conflicts of interest between the interests of HUF on one hand, and personal, professional, and business interests on the other. This includes avoiding potential and actual conflicts of interest, indirect conflicts of interest, as well as perceptions of conflicts of interest.*

*I understand that the purposes of this policy are to protect the integrity of HUF's decision-making process, to enable our constituencies to have confidence in our integrity, and to protect the integrity and reputations of volunteers, staff, and Board Members. Upon or before election, hiring, or appointment, I will make a full, written disclosure of interests, relationships, and holdings that could potentially*

*result in a direct or indirect conflict of interest. This written disclosure will be kept on file and I will update it as appropriate.*

*In the course of meetings or activities, I will disclose any interest in a transaction or decision where I (including my business or other nonprofit affiliations), my family and/or my significant other, employer, or close associates will receive a direct or indirect benefit or gain. After disclosure, I understand that I will be asked to leave the room for the discussion and will not be permitted to vote on the questions.*

*I understand that this policy is meant to supplement good judgment, and I will respect its spirit as well as its wording.*

**i. Board Meetings**

The Board shall have meetings and an annual meeting, and may call special meetings as necessary, according to the proper protocol as outlined herein.

**1. Scheduling of Meetings**

Written notice of all Board meetings shall be sent to all Directors at least five business days prior to the meeting date.

**2. Annual Meeting**

An annual meeting shall be held ~~in May, or 60 days thereof, of~~ each year at such place and on such date as the Board Chair may determine, with the purpose of reporting on the status of the Corporation, its programs, and to consider such other matters as is appropriate by law or custom for an annual meeting.

**3. Special Meetings**

Special meetings may be called by the Board Chair or upon written request by three Board members within three business days of the proposed meeting.

**j. Attendance at Meetings**

Directors are required to attend meetings and must notify the Chief Executive and Board Chair prior to the regular meeting if they are not able to attend. Three absences within twelve consecutive months shall be grounds for removal of any Board member, which removal shall be initiated by a motion of the Board Chair.

**ARTICLE V: VOTING BY THE BOARD AND COMMITTEE MEMBERS**

**a. Rules Governing Voting**

Voting shall be governed by the following rules:

**1. One Vote**

One Director shall have one and only one vote on any matter presented to the Board, except any Board Member Emeritus who shall not be entitled to vote. Similarly, a committee member shall have one and only one vote on any matter presented to the committee.

**2. Quorum**

A quorum for the transaction of ordinary business, including business transacted by the Board or a Committee, as the case may be, shall consist of fifty-percent plus one (50% + 1) of the total Directors or committee members entitled to vote. An affirmative vote of fifty-percent plus one (50% + 1) of the voting Directors or committee members present shall decide any questions before said Board or committee, respectively. In the event that use of a proxy vote is approved by the Board Chair or Committee Chair in accordance with Article V, Section (a)(4) below, then such proxy vote will also count toward the establishment of a quorum for voting purposes.

**3. Number of Affirmative Votes Required**

An affirmative vote of fifty-percent plus one (50% + 1) of the total number of Directors, or committee members, then voting, as applicable, shall decide any motion before the matter is passed. Notwithstanding this, and consistent with Article XI, below, an affirmative vote of two-thirds ( $\frac{2}{3}$ ) of the total number of Directors then voting shall be required before any amendment(s) to the By-Laws shall be deemed approved.

**4. Proxy Voting**

No proxy vote will be allowed unless the use of such proxy vote is for use under exceptional circumstances and is approved in the discretion of the Board Chair (for Board meetings) or Committee Chair (for Committee meetings) in advance of the vote at which the proxy vote is to be exercised. In the event that a proxy vote is permitted, such proxy vote will count toward establishment of a quorum for voting purposes.

**5. Secret Ballot**

On the request of one Director or committee member, voting may be by secret ballot with a majority vote from the membership in attendance at the meeting.

**6. Voting by Alternative Method**

Voting may be by “alternative methods” (such as electronic mail and/or telephonic vote) in emergency situations or as otherwise may be deemed necessary, and only as called upon by the Board Chair or Committee Chair. If the alternative voting method to be employed is electronic mail, then the matter for which a decision or resolution is being sought shall not be concluded prior to 48 business hours from when the initial e-mail requesting a vote was sent, unless fifty-percent



plus one (50% + 1) of the total number of Directors or committee members, as applicable, have cast their vote in favor of the matter, or fifty-percent plus one (50% + 1) of the total number of Directors or committee members, as applicable, have cast their vote against the matter. The alternative method vote shall be subject to discussion, and shall be provided to all Directors or committee members to give every Director or committee member the opportunity to participate in said discussion. A separate file for alternative method votes shall be created, and copies of all the alternative method discussions and votes shall be affixed to said file. Every alternative method resolution that occurs must be documented in the minutes of the regular meeting or committee meeting immediately following the alternative method vote.

## **ARTICLE VI: OFFICERS OF THE CORPORATION'S BOARD**

### **a. Non-Employee Officers of the Corporation's Board**

The non-employee officers of the Corporation's Board shall be the Board Chair, Chair-Elect, Secretary, Treasurer, and Past Chair (the "Board Officers"). All Board Officers shall be voting members of the Board. The Board Officers shall continuously monitor the business and affairs of the Corporation, and may propose action to promote the purposes of the Corporation. The Board Officers shall keep regular minutes of their proceedings, and a copy shall be furnished to all Directors.

#### **1. Election and Tenure**

Each Board Officer shall be elected for an initial term of one year, and may be re-elected for one additional one-year term for the same office for a limit of two consecutive years in any particular office. Nothing herein shall prohibit any individual from subsequently holding a given office for an additional two-year term provided that such individual vacate the office for at least one year in the interim. Notwithstanding the above limitation on the terms of Board Officers, in the event that circumstances exist where the knowledge, experience, and acumen of any Board Officer is such that the continuance in office of such individual for more than two consecutive years will be in the best interest of the Corporation, then the Board by a majority vote may extend the term of the ~~Treasurer-Officer~~ beyond the two-year limitation to hold the same office.

#### **2. Vacancies**

Should a Board Officer not complete an elected term, then that Board Officer position shall be considered vacant, and shall be filled in accordance with the provisions of these By-Laws for the nomination and election of Board Officers, and only for the remaining portion of such elected Board Officer's original term.

#### **3. Two-Year Option**

By August 1<sup>st</sup> of each calendar year in which each Board Officer is serving his, her, or their initial one-year term, each Board Officer shall notify the Governance Chair whether or not such Board Officer is willing to serve in the same office for an additional one-year term. If a Board Officer notifies the Governance Chair that he, she, or they is declining or not willing to serve an

additional one-year term in the same office, the Governance Committee will abide by that declination. Election procedures shall be pursuant to the procedures for the election of Directors.

**b. Duties and Powers of the Non-Employee Officers of the Corporation's Board**

The duties of the Board Officers shall be the following:

**1. Board Chair**

(a) Build Participation

- Build engagement and momentum through ex-officio membership on Board committees;
- Participate in on-boarding of all new Directors through the orientation and conversations;
- Create a relaxed, natural environment in meetings and other exchanges; and
- Involve and support staff.

(b) Acquire and Communicate Information

- Serve on the Executive Committee;
- Maintain knowledge of the Corporation and a personal commitment to its goals and objectives;
- Stay informed;
- Share information with Board Officers, Directors,, committee chairs, and others in leadership positions;
- Work with the Chief Executive to prepare the monthly agenda for Board meetings; and
- Communicate concisely accomplishments, challenges, and failures.

(c) Talent Acquisition & Performance Evaluation

- Oversee search for new Chief Executive if and when necessary;
- With the Governance Chair and Chief Executive, lead the annual individual and collective Board assessment;
- Coordinate and participate in the performance evaluation of the Chief Executive; and
- Recognize good performance.

(d) Delegate

- Know the Board's role and the staff's role, and delegate accordingly;
- Expect reports and periodically assess progress; and
- Share the credit and share the risk.

(e) Raise Funds

- Be a role model for staff and Directors;
  - Provide leadership in activities and events; and
  - Personally contribute.
- (f) Be Visible in the Community
- Attend social functions;
  - Speak in public on behalf of the Corporation;
  - Be a consistent and open advocate for the cause, and encourage and support Board members to do the same; and
  - Act as an alternate spokesperson for the Corporation.
- (g) Develop Board Leaders
- Help identify his, her, or their successor and assist with on-boarding of the next Board Chair;
  - Assist Governance Chair and work with the Chair-Elect and Chief Executive to identify and recruit future Board Officers;
  - In collaboration with the Chief Executive and Governance Chair, designate committee chairs and serve as mentor;
  - Work closely with the Governance Chair on new Board member recruitment;
  - Provide guidance and leadership to rising stars on the Board.
- (h) Plan for the Future
- Work with the Chair-Elect, Governance Chair, and Chief Executive on an annual planning session;
  - Ensure the Board reviews the Corporation's strategic plan on a regular basis;
  - Ensure the Corporation is funded for an in-depth strategic planning process every 3-5 years; and
  - Encourage and engage the Corporation and the Board to participate in advocacy.

## **2. Chair-Elect**

- (a) Attend all Board meetings;
- (b) Maintain knowledge of the Corporation and a personal commitment to its goals and objectives;
- (c) Serve on the Executive Committee and serve on an additional standing committee;
- (d) Work with the Board Chair, the Governance Chair, and the Chief Executive in conducting a yearly planning session, which will update the Corporation's vision, role, actions and strategic positioning;

- (e) Carry out special assignments as requested by the Board Chair;
- (f) Understand the responsibilities of the Board Chair, and be able to perform these duties in the Board Chair's absence;
- (g) Work with the Board Chair and Governance Chair to identify and recruit future Board Officers;
- (h) Participate as a vital part of the Board leadership; and
- (i) Support the Chief Executive and selected Board committees in the formulation of, and subsequent implementation of, a strategic plan.

### **3. Secretary**

- (a) Attend all Board meetings;
- (b) Maintain knowledge of the Corporation and a personal commitment to its goals and objectives;
- (c) Serve on the Executive Committee and serve on an additional standing committee;
- (d) Ensure the safety and accuracy of all Board records;
- (e) Review Board meeting minutes and ensure their accuracy;
- (f) Work with staff to create and maintain a Board Calendar with key information such as Board Officer slates, Chief Executive review and agreement due dates, new Director orientations, Board Thank You calendar, etc.;
- (g) Facilitate adherence with the principles of Robert's Rules and approval of Board actions should questions arise;
- (h) Assume responsibilities of the Board Chair in the absence of the Board Chair and Chair-Elect; and
- (i) Ensure adequate notice of meetings of the Board and/or of a committee is provided when such notice is required.

### **4. Treasurer**

- (a) Attend all Board meetings;

- (b) Maintain knowledge of the Corporation and a personal commitment to its goals and objectives;
- (c) Serve on the Executive Committee and chair the Finance Committee;
- (d) Understand financial accounting for nonprofit organizations;
- (e) Serve as the financial officer of the Corporation's Board and as chairperson of the Finance Committee;
- (f) Recruit one individual from the Finance Committee to chair the Audit Committee (can recruit "self") [IRS rules allow for only one Finance Committee member to serve on the Audit Committee. Other Audit Committee members must include current Board members. Additional external members may also be recruited.];
- (g) With the Finance Committee, manage the Board's review of, and action related to, the Board's financial responsibilities;
- (h) Work with the Chief Executive and the Chief Financial Officer to ensure that appropriate financial reports are made available to the Board on a timely basis;
- (i) Assist the Chief Executive of the Chief Financial Officer in preparing the annual budget and presenting the budget to the Board for approval;
- (j) Assist the Chief Executive and the Chief Financial Officer in the design and execution of the Corporation's treasury policy;
- (k) Present the annual budget to the Board for approval; and
- (l) Ensure the Audit Committee chair reviews the annual audit and answers Board members' questions about the audit and the auditor's report.

**5. Immediate Past-Chair**

- (a) Attend all Board meetings;
- (b) Serve on the Executive Committee;
- (c) Carry out special assignments as requested by the Board Chair;
- (d) Assist the Board Chair by providing historical information and sharing personal experiences on issues addressed by the Board the previous year; and

- (e) Participate as a vital part of Board leadership.

## **ARTICLE VII: EMPLOYEE OFFICERS OF THE CORPORATION**

### **a. Employee Officers of the Corporation**

The employee officers of the Corporation shall be the President, the Chief Executive Officer, the Executive Director (if this position is filled), the Chief Operating Officer (if this position is filled), the Chief Financial Officer; the Vice President of Development, and the Vice President of Programs (collectively, the “Employee Officers”). The offices of President and Chief Executive Officer shall be combined until such time as a majority vote of the Board determines to create two separate positions. For ease of reference, the combined position of Chief Executive Officer/President shall be referred to in these By-Laws as the CEO. Only the CEO reports to the Board. All other Employee Officers report to the CEO.

#### **1. Chief Executive Officer/President**

The Chief Executive Officer/President (“CEO”) shall be an at-will employee of the Corporation, and shall remain in office subject to the vote of a majority of the Board or until such time as the CEO resigns. The CEO shall attend all meetings of the Board and such meetings of the committees of the Board as requested by the Board Chair, but shall not be a voting member of the Board or any committee. The CEO may execute any contracts or instruments which the Board authorizes or as otherwise permitted by Articles IX and/or X of these By-Laws. The CEO shall perform such other duties as may be prescribed by the Board consistent with being the CEO of the Corporation. In the event of a vacancy in the position of CEO, the position shall be filled based upon the majority vote of the Board.

## **ARTICLE VIII: COMMITTEES**

### **a. Designation of Committees**

The Board may, by resolution, designate standing and/or ad hoc committees. Each such committee (“Committee”) shall have power to the extent delegated to it by the Board and in accordance with the laws of the State of Florida. Each Committee shall keep minutes of proceedings and report to the Board. The Board Chair shall be an ex-officio member of each Committee with one (1) vote in each Committee. Unless otherwise stated herein, Committee appointments shall be made by the Board Chair, and the term of the appointment of each Committee member is at the will and direction of the Board Chair.

### **b. Standing Committees**

The following committees have been established by the Board as necessary:

#### **1. Executive Committee**

The Executive Committee is comprised of the following: the CEO (non-voting); Executive Director (if such position is filled; non-voting); Board Chair; Chair Elect; Secretary; Treasurer; and Immediate Past Chair. A quorum of any three of the Board Officers can meet in executive session.

## **2. Finance Committee**

The Finance Committee assists the Board Chair and the CFO in preparing and presenting the budget to the Board for approval, monitors the record keeping, reviews finances and makes recommendations to the Board. The Finance Committee also reviews bids for Major Purchases and/or Major Contracts as those terms are defined in Article X, below. The Finance Committee may include non-Board members, but must have a Board member as the chair.

## **3. Audit Committee**

The Audit Committee shall be composed of three (3) Board members, in good standing and independent. At least one (1) member of the Audit Committee shall have appropriate financial experience and acumen, and up to one member of the Finance Committee may serve on the Audit Committee. The Audit Committee's principal responsibilities are to see that appropriate accounting policies and internal protocols are established and followed, and that the Corporation is issued financial statements and reports on time. The Audit Committee shall select a certified public accounting firm to audit and examine the books of the Corporation on an annual basis. Said accounting firm shall not have conflicts of interest with the Corporation and shall not have representation on the Board. The Audit Committee shall report on the examination of the books and the financial condition of the Corporation upon completion of the financial statements and audited reports. Audits shall commence no later than thirty (30) days from the closing of the books for the fiscal year. The completed audit shall be presented to the Board no later than ninety (90) days from the beginning of the audit.

## **4. Governance Committee**

The Governance Committee provides oversight and guidance for the Board of Directors to ensure effective engagement, succession, diversity and equity among the members serving on the Board of Directors and committees.

The Chair of Governance Committee shall be a current Board member in good standing. The Governance Committee may include non-Board members who have previously served on the Board.

The Governance Committee shall have the responsibility for vetting prospective members of the Board, recommending the names of persons that should be considered for Board vacancies, and for recommending to the Board a slate of Directors. In the event of a vacancy in the position of a Director or Board Officer, the Governance Committee shall produce a list of candidates to the Board to fill such vacancy.

The Governance Committee shall conduct an orientation session for new Board members to ensure that they understand their duties and the Corporation's operating procedures.

The Governance Committee shall make an annual review of the Directors' adherence to the requirements for attendance, contribution, support and involvement with the Corporation, and shall report the general findings of such review to the Board.

The Governance Committee is responsible for initiating and assisting the Board Chair with the CEO's annual performance review, initiating and overseeing individual Board member performance reviews, and assisting the Chair-Elect with the Board's annual planning meeting.

The Governance Committee is also responsible for updating the By-Laws as and when needed and initiating the quinquennial strategic planning process in conjunction with the Board Officers, Committee Chairs, and Employee Officers.

## **5. Marketing Committee**

The Marketing Committee is responsible for overseeing the overall direction, coordination, and oversight of the Corporation's brand and image. The Marketing Committee shall work with the employees of the Corporation to strategically, and in a cohesive manner, promote the Corporation as a whole in order to increase the Corporation's visibility and stature within the community. The Marketing Committee may include non-Board members, but must have a Board member as the chair.

## **6. Public Policy and Advocacy Committee**

The Public Policy and Advocacy Committee is charged by the Board to review public policy, make recommendations, and suggest strategies for addressing these issues. Specifically, the Public Policy and Advocacy Committee is responsible for: researching and identifying key priority issues that impact the Corporation's clients and that align with the Corporation's mission; developing, reviewing, and approving the Corporation's annual public policy agenda (state and federal); developing strategies to advocate the public policy agenda and any other key priority issues; cultivating and maintaining relationships with stakeholders and elected officials at all levels of government from all political parties and affiliations; and increasing the understanding of the Corporation's Board members and employees regarding the benefits of public policy engagement and advocacy, and educating them on what and how the Corporation is permitted to advocate. The Public Policy and Advocacy Committee may include non-Board members, but must have a Board member as the chair.

### **c. Ad-hoc Committees**

Ad-hoc committees are to be created when there is a specific need for a committee that cannot be fulfilled by the actual standing committees. The creation of an ad-hoc committee may be suggested by any Director of the Board and must be approved by a majority of the Executive Committee. The Board Chair may create and appoint members to ad-hoc committees and task forces as he/she/they deem appropriate. Such ad-hoc committees and task forces shall have the



powers and duties designated by the Board, and shall give advice and make non-binding recommendations to the Board. These committees may include non-Board members, but must have a Board member as the chair.

#### **ARTICLE IX: CHECKS, NOTES, AND DRAFTS**

For accounting purposes, the Corporation shall maintain a minimum of one operating account. All checks, notes, and drafts made from the operating account, or from any other account maintained by the Corporation, in an amount of \$10,000.00 or greater must be signed jointly by the CEO and a Board Officer with signature authority following approval by a majority vote of the Board. All checks, notes, and drafts for less than \$10,000.00 may be signed the CEO and/or a duly authorized Board Officer and do not require separate Board approval.

#### **ARTICLE X: CONTRACTS**

Any purchase, expenditure, or contract by which the Corporation undertakes an obligation equal to or greater than \$10,000.00, and which is not specifically identified in the annual budget, shall be deemed a “Major Purchase” and/or “Major Contract”. Major Purchases and Major Contracts do not include budget items for fundraising events, monthly maintenance or program services relating to the program’s grant budget. All Major Purchases and/or Major Contracts must be specifically authorized by a majority vote of the Board.

#### **ARTICLE XI: BY-LAWS**

Amendments to the By-Laws shall be prepared by the Governance Committee. The Board shall be given a redlined version of the proposed amended By-Laws no less than twenty days prior to the presentation of any such amendments to the Board for approval. An affirmative vote of two-thirds ( $\frac{2}{3}$ ) of the total number of Directors then voting shall be required before any amendment(s) to the By-Laws shall be deemed approved.

#### **ARTICLE XII: NON PROFIT ORGANIZATION**

This Corporation is not organized for pecuniary profit. It shall not have any power to issue certificates or stocks or to declare dividends, and no part of its income shall inure to the benefit of any Member, Director, Board Officer, Employee Officer, or individual (notwithstanding any salary paid to any employee of the Corporation, or any benefit incident to employment paid on behalf of, or for the benefit of, an employee of the Corporation).

#### **ARTICLE XIII: EMPLOYEES OF THE CORPORATION**

All paid employees of the Corporation (except for the CEO) shall be selected by the CEO, consistent with the policies outlined in the Corporation’s Policies and Procedures Manual, as it may be amended from time to time.

#### **ARTICLE XIV: GRIEVANCE PROCESS**

Grievance procedures are described in the Corporation's Employee Manual. The Board shall maintain a personnel and grievance policy, and may from time to time move to amend it. Should the employees, clients, and/or vendors of the Corporation believe that a decision affecting them is unjust or inequitable, they shall have a forum in which to appeal to the Board and/or Executive Committee. As provided by the Corporation's policies and procedures, the grievant must exhaust all administrative measures first and such request must be in writing. The Board's decision shall be considered final.

#### **ARTICLE XV: CONFIDENTIALITY**

Board members, Committee members, and employees of the Corporation shall be bound to the strictest confidence, both during and after their term with the Corporation, regarding all matters having to do with the Corporation's Board and the business conducted therein.

#### **ARTICLE XVI: RULES OF ORDER**

In case of doubt or conflict, Robert's Rules of Order shall be consulted and its recommendation adopted.

#### **ARTICLE XVII: INDEMNIFICATION**

The Corporation's Directors and Board Officers shall be indemnified as of right to the fullest extent now or hereafter permitted by law in connection with any actual or threatened civil, criminal, administrative, or investigative action, suit, or proceeding (whether brought by, or in the name of, the Corporation or otherwise) within the course, scope, and/or arising out of their service to the Corporation or to another organization at the Corporation's request.



Empowering a  
New Generation  
of Americans

<b>Officer</b>	<b>2023 – CURRENT</b>	<b>2024 – PROPOSED</b>
Chair	Christina Paradowski	Anthony Abbate
Chair Elect	Anthony Abbate	Maritza Alvarez
Secretary	Carolina Cardozo	Carolina Cardozo
Treasurer	Lisette Rodriguez	Lisette Rodriguez
Past Chair	Lucia Rodriguez	Christina Paradowski



Empowering a  
New Generation  
of Americans

## Employee Handbook Policy Additions and Revisions Summary (Roll out of new handbook in January 2024)

<p><a href="#">Introduction</a> History Our Vision Our Mission Our Values</p>	<p>pg. 5-6, all new sections; this information is from the agency's website.</p>
<p><a href="#">Employment at Will</a></p>	<p>Pg. 7, new section</p>
<p><a href="#">Equal Opportunity and Commitment to Diversity</a></p>	<p>Pg. 9, revised and updated to latest EEO policy to include transgender.</p>
<p><a href="#">Smoke-Free Workplace</a></p>	<p>Pg. 22, revised policy to include examples of all places that are non-smoking and to also include vaping, e-cigarettes.</p>
<p><a href="#">Progressive Discipline Program</a></p>	<p>Pg. 28, revised policy to include progressive discipline steps to take in case there are issues with performance or conduct.</p>
<p><a href="#">Attire, Appearance, and Hygiene</a></p>	<p>Pg. 30, revised policy to give specific examples of appropriate work attire depending on the employee's position and department. Also added a section on proper hygiene in the workplace.</p>
<p><a href="#">Cell Phone Safety and Driving</a></p>	<p>Pg. 32, new policy; this policy discusses the importance of safety first when operating a vehicle.</p>
<p><a href="#">Social Media Acceptable Use</a></p>	<p>Pg. 32, revised policy to expand on recent legal language updates.</p>
<p><a href="#">Remote Policy</a></p>	<p>Pg. 34, new policy; this policy discusses the goal, guidelines, and procedures for working remote.</p>
<p><a href="#">Paid Holidays</a></p>	<p>Pg. 41, revised policy to include Juneteenth, and to expand on when an employee is eligible for Holiday pay.</p>
<p><a href="#">Vacation, Personal Days, and Sick Time</a></p>	<p>Pg. 42 - 44, revised policy to introduce 5 sick days and allowing employees to rollover their sick time up to 30 days to be used for emergency FMLA (Family and Medical Leave Act) qualified situations. Changes to personal time based on hire date (for new employees) and vacation time (earned benefit based on tenure).</p>

[Holiday Break](#)

Pg. 45, new policy; this policy discusses the week closure during the holiday season.

**HUF**  
**EMPLOYEE HANDBOOK**



DRAFT

**Last updated: October 2023**

<b>Introduction .....</b>	<b>5</b>
<b>History .....</b>	<b>6</b>
<b>Our Vision .....</b>	<b>6</b>
<b>Our Mission .....</b>	<b>6</b>
<b>Our Values .....</b>	<b>6</b>
<b>Employment At Will .....</b>	<b>7</b>
<b>Equal Opportunity and Commitment to Diversity .....</b>	<b>9</b>
<b>Equal Employment Opportunity .....</b>	<b>9</b>
<b>Commitment to Diversity .....</b>	<b>9</b>
<b>Harassment and Complaint Procedure .....</b>	<b>10</b>
<b>Conflicts of Interest and Confidentiality .....</b>	<b>11</b>
<b>Conflicts of Interest .....</b>	<b>11</b>
<b>Confidential Information .....</b>	<b>12</b>
<b>Employment Relationship .....</b>	<b>13</b>
<b>Employee Privacy .....</b>	<b>13</b>
<b>Introductory Period .....</b>	<b>13</b>
<b>Employee Service Credit .....</b>	<b>14</b>
<b>Employment Classification .....</b>	<b>14</b>
<b>Workweek and Hours of Work .....</b>	<b>15</b>
<b>Meal and Rest Breaks .....</b>	<b>15</b>
<b>Lactation Breaks .....</b>	<b>15</b>
<b>Time Records .....</b>	<b>16</b>
<b>Safe Harbor for Exempt Employees .....</b>	<b>16</b>
<b>Overtime .....</b>	<b>17</b>
<b>Pay Procedures .....</b>	<b>17</b>
<b>Salary Advances .....</b>	<b>18</b>
<b>Pay Transparency Policy Statement .....</b>	<b>19</b>
<b>Immigration Law Applicable to all Employees .....</b>	<b>19</b>
<b>Background Screening .....</b>	<b>19</b>
<b>Access to Personnel Files .....</b>	<b>19</b>
<b>Relatives and Domestic Partners .....</b>	<b>20</b>
<b>Separation from Employment .....</b>	<b>20</b>
<b>Workplace Safety .....</b>	<b>21</b>
<b>Drug-Free and Alcohol-Free Workplace .....</b>	<b>21</b>

Smoke-Free Workplace .....	22
Workplace Violence Prevention .....	22
Commitment to Safety .....	23
Emergency Closing / Severe Weather Conditions .....	23
Visitors .....	24
<b>Workplace Guidelines .....</b>	<b>24</b>
Attendance .....	24
Performance Review .....	24
Job Postings .....	24
Open Door Policy .....	25
Conduct and Expectations .....	25
Prohibited Conduct .....	26
Progressive Discipline Program .....	28
Conduct and Employment Outside Work .....	28
Attire, Appearance, and Hygiene .....	29
Operation of Vehicles .....	30
Cell Phone Safety and Driving .....	31
Social Media Acceptable Use .....	31
Remote Policy .....	33
Goal .....	33
What Is Hispanic Unity of Florida’s View on Remote Work? .....	33
Designated Remote Work Location .....	34
What Is Remote Work? .....	34
Definitions of types of Remote Work .....	34
Who Is Eligible? .....	35
How Does the Policy Work? .....	35
Bulletin Boards .....	38
Solicitation .....	38
Computers, Internet, E-Mail, and Other Resources .....	38
Facilities, Equipment & Property, Including Intellectual Property .....	40
<b>Time Off and Leave of Absence .....</b>	<b>40</b>
Paid Holidays .....	40
Vacation .....	42
Sick Days .....	43



<b>Holiday Break – narrative to reflect new chart on this.....</b>	<b>45</b>
<b>Personal Leave .....</b>	<b>45</b>
<b>Family and Medical Leave.....</b>	<b>46</b>
<b>Military Leave.....</b>	<b>49</b>
<b>Domestic or Sexual Violence Leave.....</b>	<b>50</b>
<b>Bereavement Leave.....</b>	<b>51</b>
<b>Jury Duty/Court Appearance .....</b>	<b>51</b>
<b>Time Off for Voting.....</b>	<b>52</b>
<b>Training Programs and Seminars .....</b>	<b>52</b>
<b>Employee Benefits.....</b>	<b>52</b>
<b>Benefits Overview .....</b>	<b>52</b>
<b>Medical, Dental, and Vision Insurance.....</b>	<b>53</b>
<b>Continuation of Health Coverage .....</b>	<b>54</b>
<b>Group Life Insurance .....</b>	<b>54</b>
<b>Supplemental Life Insurance.....</b>	<b>54</b>
<b>Short-Term Disability .....</b>	<b>54</b>
<b>Long-Term Disability.....</b>	<b>54</b>
<b>401(k) Plan .....</b>	<b>55</b>
<b>Workers’ Compensation .....</b>	<b>55</b>
<b>Employee Assistance Program .....</b>	<b>56</b>
<b>EMPLOYEE HANDBOOK ACKNOWLEDGMENT AND RECEIPT .....</b>	<b>57</b>

## Introduction

For employees who are commencing employment with Hispanic Unity of Florida, Inc. ("Hispanic Unity of Florida," "the Agency" or "HUF") and on behalf of the entire team, let me extend a warm and sincere welcome!

For employees who have been with us, thanks for your past and continued service.

I extend my personal best wishes for success and happiness here at HUF. We understand that it is our employees who provide the services that our clients and families rely upon, and who will enable us to create new opportunities in the years to come.

You are joining an organization that has a reputation for outstanding leadership, innovation, and expertise. Our employees use their creativity and talent to provide the best experience for our clients and donors, meet new demands, and offer the most effective services/products in the industry. With your active involvement, creativity, and support, HUF will continue to achieve its goals. We sincerely hope you will take pride in being an important part of HUF's success.

Please take time to review the policies contained in this handbook. If you have questions, feel free to ask your supervisor or to contact the Human Resources (HR) department.

Sincerely,

Felipe Pinzon  
President & CEO  
Hispanic Unity of Florida, Inc.

## History

Founded in 1982 as a haven for immigrants and refugees, HUF has grown to serve diverse and multi-cultural working families from the United States as well as more than 25 other countries. We provide a range of wrap-around services to help more than 23,000 clients of all ages, from preschoolers to adults, successfully transition to a productive new life.

HUF offers 12 programs and over 30 services in four languages - English, Spanish, Haitian Creole, and Sign Language (for our VITA free tax preparation program).

South Florida's unique geographic location has made it a popular destination for the Caribbean and Latin American immigrants, as well as others from throughout the world. Often arriving with little more than the clothes on their backs, a few dollars in their pockets, with no job, language skills or understanding of the life that awaits them on America's shores – they still come with hopes and dreams. Hispanic Unity of Florida is proud and grateful to be South Florida's "Ellis Island" for new immigrants arriving in South Florida.

***HUF is a non-political, non-partisan community organization.***

## Our Vision

Everyone is empowered to live *their* American Dream.

## Our Mission

Empowering immigrants and others to become self-sufficient, productive, and civically engaged.

## Our Values

### **CHANGE LIVES AND MAKE A DIFFERENCE!**

At Hispanic Unity of Florida, we change lives every single day – in small and big ways. You have joined an exceptional organization that works tirelessly to ensure that everyone is empowered to live their American dream, welcome!

It is imperative that all our employees share HUF values as it serves as the foundation for how we treat each other, our clients, our funders, and everyone we encounter. Those values include but are not limited to *respect and dignity, integrity, transparency, accountability, diversity, inclusion and cultural awareness, commitment to excellence, collaboration, and teamwork.*

Our values serve as a compass for our actions – Staff, Board of Directors, and Volunteers.

**People first.**

*Respect & Dignity*

We treat everyone as a worthy individual whose experience, point of view and defining factors are acknowledged, accepted, and valued.

**We are transparent.**

*Integrity & Transparency*

We are accountable for the highest standards of behavior and will act with integrity, fairness, and openness in all our dealings.

**We keep our promises to others and each other.**

*Accountability*

We are committed to using our resources efficiently, achieving measurable results and readily communicating with employees, the community, clients, supporters, and partners.

**Diversity is our strength. Equity & Inclusion must be intentional.**

*Diversity, Inclusion and Cultural Awareness*

We are committed to embracing diversity, inclusion, cultural awareness, and non-discrimination. This promise is made to ensure that the message of acceptance and tolerance is expressed in how we think and in everything we say and do.

**We are Entrepreneurial and calculated Risk-takers.**

*Commitment to Excellence*

We are committed to providing the highest standards of service and conducting business with integrity and fiduciary responsibility.

**Together we are a “force for good.”**

*Collaboration & Teamwork*

We embrace the power of working together for a common purpose and greater good.

**Employment At Will**

Employment at HUF is on an at-will basis unless otherwise stated in a written individual employment agreement signed by the President and CEO of the Agency. Nothing in this employee handbook creates or is intended to create an employment agreement, express or implied. Nothing contained in this, or any other document provided to the employee is intended to be, nor should it be, construed as a contract that employment or any benefit will be continued for any period. In addition, no Agency representative is authorized to modify this policy for any employee or to enter into any agreement, oral or written, that changes the at-will relationship.

This means that either the employee or the Agency may terminate the employment relationship at any time, for any reason, with or without notice.

Any salary figures provided to an employee in annual or monthly terms are stated for the sake of convenience or to facilitate comparisons and are not intended to and do not create an employment contract for any specific period.

Nothing in this statement is intended to interfere with, restrain, or prevent concerted activity as protected by the National Labor Relations Act (NLRA). Such activity includes employee communications regarding wages, hours, or other terms or conditions of employment. HUF employees have the right to engage in or refrain from such activities.

DRAFT

## **Equal Opportunity and Commitment to Diversity**

### **Equal Employment Opportunity**

HUF provides equal employment opportunities to all employees and applicants for employment without regard to race, color, creed, ancestry, national origin, citizenship, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, religion, age, disability, genetic information, service in the military, or any other characteristic protected by applicable federal, state, or local laws and ordinances. Equal employment opportunity applies to all terms and conditions of employment, including hiring, placement, promotion, termination, layoff, recall, transfer, leave of absence, compensation, and training.

HUF expressly prohibits any form of unlawful employee harassment or discrimination based on any of the characteristics mentioned above. Improper interference with the ability of other employees to perform their expected job duties is not tolerated.

HUF will endeavor to make a reasonable accommodation of an otherwise qualified applicant or employee related to an individual's physical or mental disability, sincerely held religious beliefs and practices, and/or any other reason required by applicable law, unless doing so would impose an undue hardship upon HUF's operations. Any request for reasonable accommodation should be addressed to the HR department.

Any employees with questions or concerns about equal employment opportunities in the workplace are encouraged to bring these issues to the attention of their immediate supervisor. The Agency will not tolerate any form of retaliation or reprisals against individuals who have articulated any issues or concerns regarding equal employment opportunity. Employees who feel they have been subjected to any such retaliation should bring it to the attention of the HR department.

### **Commitment to Diversity**

HUF is committed to creating and maintaining a workplace in which all employees have an opportunity to participate and contribute to the success of the business and are valued for their skills, experience, and unique perspectives. This commitment is embodied in Agency policy and the way we do business at HUF and is an important principle of sound business management.

## Harassment and Complaint Procedure

It is HUF's policy to prohibit harassment of or against job applicants, contractors, interns, volunteers, or employees by another employee, supervisor, vendor, client, or third party based on race, color, creed, religion, national origin, ancestry, citizenship status, age, sex or gender (including pregnancy, childbirth, and pregnancy-related conditions), gender identity or expression (including transgender status), sexual orientation, marital status, military service and veteran status, physical or mental disability, genetic information, or any other characteristic protected by applicable federal, state, or local laws. Such conduct will not be tolerated by HUF.

Furthermore, any retaliation against an individual who has complained about sexual or other harassment or retaliation against individuals for cooperating with an investigation of a harassment complaint will not be tolerated. HUF will take all reasonable steps necessary to prevent and eliminate harassment in the workplace.

"Sexual harassment" can include all the above actions, as well as other unwelcome conduct, and is generally defined under both state and federal law as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature whereby:

- Submission to or rejection of such conduct is made either explicitly or implicitly as a term or condition of any individual's employment or as a basis for employment decisions.
- Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile, or an offensive work environment.

Other sexually oriented conduct, whether intended or not, that is unwelcome and has the effect of creating a work environment that is hostile, offensive, intimidating, or humiliating to workers may also constitute sexual harassment.

While it is not possible to list all those additional circumstances that may constitute sexual harassment, the following are some examples of conduct that, if unwelcome, may constitute sexual harassment depending on the totality of the circumstances, including the severity of the conduct and its pervasiveness:

- Unwanted sexual advances, whether they involve physical touching or not.
- Sexual epithets; jokes; written or oral references to sexual conduct; gossip regarding one's sex life; comments about an individual's body; and comments about an individual's sexual activity, deficiencies, or prowess.
- Displaying sexually suggestive objects, pictures, or cartoons.
- Unwelcome leering, whistling, brushing up against the body, sexual gestures, or suggestive or insulting comments.
- Inquiries into one's sexual experiences; *and*
- Discussion of one's sexual activities.

Harassment based on any other protected classification or characteristic is also strictly prohibited. Harassment is verbal or physical conduct that denigrates or shows hostility or aversion toward an individual because of any protected classification or characteristic, and that:

1. Has the purpose or effect of creating an intimidating, hostile, or offensive Work environment
2. Has the purpose or effect of unreasonably interfering with an individual's work performance; or
3. Otherwise adversely affects an individual's employment opportunities.

**Complaint procedure.** Do not assume that HUF is aware of any concerns you have related to discrimination or harassment, including sexual harassment. It is the employee's responsibility to bring complaints and concerns to the management's attention. If an employee believes they have been subject to or have witnessed discrimination, including sexual or other forms of unlawful harassment, or other inappropriate conduct, the employee is requested and encouraged to share their concerns with HUF. The employee may speak directly to their immediate supervisor or HR.

All complaints will be investigated promptly, and confidentiality will be protected to the extent possible. A timely resolution of each complaint should be reached and communicated, as necessary.

If the investigation confirms conduct that violates this policy has occurred, HUF will take immediate, appropriate, corrective action against the offender up to and including immediate termination.

No reprisal, retaliation, or other adverse action will be taken against an employee for making a complaint or report of discrimination or harassment or for assisting in the investigation of any such complaint or report. Any suspected retaliation or intimidation should be reported immediately to one of the persons identified above.

## **Conflicts of Interest and Confidentiality**

### **Conflicts of Interest**

HUF expects all employees to conduct their own Agency business in a manner that reflects the highest standards of ethical conduct and is in accordance with all federal, state, and local laws and regulations. This includes avoiding real and potential conflicts of interests.

Exactly what constitutes a conflict of interest, or an unethical business practice is both a moral and a legal question. HUF recognizes and respects the individual employee's right to engage in activities outside of employment that are private in nature and do not in any way conflict with or reflect poorly on the Agency.



It is not possible to define all the circumstances and relationships that might create a conflict of interest. If a situation arises in which there is a potential conflict of interest, the employee should discuss this with a manager for advice and guidance on how to proceed. The list below suggests some of the types of activities that indicate improper behavior, unacceptable personal integrity, or unacceptable ethics:

1. Simultaneous employment by another firm that is a competitor of or supplier to HUF.
2. Carrying on Agency business with a firm in which the employee, or a close relative of the employee, has a substantial ownership or interest.
3. Holding a substantial interest in, or participating in the management of, a firm to which the Agency makes sales or from which it makes purchases.
4. Borrowing money from a client or donor, other than recognized loan institutions, from which our Agency buys services, materials, equipment, or supplies.
5. Accepting gifts, gratuity, or excessive entertainment from an outside organization or Agency.
6. Speculating or dealing in materials, equipment, supplies, services, or property purchased by the Agency.
7. Participating in civic or professional organization activities in a manner that divulges confidential Agency information.
8. Misusing privileged information or revealing confidential data to outsiders.
9. Using one's position in the Agency or knowledge of its affairs for personal gains;  
*and*
10. Engaging in practices or procedures that violate antitrust laws, commercial bribery laws, copyright laws, discrimination laws, campaign contribution laws, or other laws regulating the conduct of Agency business.

## **Confidential Information**

The protection of confidential business information and trade secrets is vital to the interests and success of HUF. Information about HUF, its employees, clients, suppliers, and vendors is to be kept confidential and divulged only to individuals within the Agency with both a need to receive and authorization to receive the information. If in doubt as to whether information should be divulged, err in favor of not divulging information and discuss the situation with your supervisor.

Confidential information is all information disclosed to or known by you because of employment with the Agency that is not known to people outside the Agency about its business. Confidential information includes but is in no way limited to financial records; business, marketing, and strategic plans; personnel and payroll records regarding current and former employees; the identity of, contact information for, and any other account information on clients, vendors, and suppliers; inventions, programs, trade secrets, formulas, techniques, and processes; and any other documents or information regarding the Agency's operations, procedures, or practices. Confidential information may not be removed from Agency premises without express authorization.

Confidential information obtained during or through employment with the Agency may not be used by any employee for the purpose of furthering current or future outside employment or activities or for obtaining personal gain or profit. Employees may be required to enter into written confidentiality agreements confirming their understanding of the Agency's confidentiality policies.

An employee who improperly uses or discloses confidential information will be subject to disciplinary action up to and including termination of employment and legal action, even if the employee does not actually benefit from the disclosed information. The Agency reserves the right to avail itself of all legal or equitable remedies to prevent impermissible use of confidential information or to recover damages incurred because of the impermissible use of confidential information.

All inquiries from the media must be referred to the Marketing Director. This provision is not intended to, and should not be interpreted to, prohibit employees from discussing wages and other terms and conditions of employment if they so choose.

## **Employment Relationship**

### **Employee Privacy**

It is HUF's goal to respect the individual privacy of its employees and maintain a safe and secure workplace. When issues of safety and security arise, employees may be requested to cooperate with an investigation. The investigation may include the following procedures to safeguard the Agency and its employees: searches of personal belongings, searches of work areas, searches of private vehicles on the Agency's premises. Failure to cooperate with an investigation is grounds for termination. Providing false information during any investigation may lead to discipline, including termination.

Employees are expected to make use of the Agency facilities only for the business purposes of the Agency. Accordingly, materials that appear on Agency hardware or networks are presumed to be for business purposes, and all such materials are subject to review by the Agency at any time without notice to the employees. Employees do not have any expectation of privacy with respect to any material on Agency property. HUF regularly monitors its communications systems and networks as allowed by law. Monitored activity may include voice, e-mail, and text communications, as well as Internet search and browsing history. Employees who make excessive use of the communications system for personal matters are subject to discipline. Employees are expected to keep personal communication to a minimum and to emergency situations.

Furthermore, as part of its security measures and to help ensure a safe workplace, HUF will position video cameras to monitor various areas of its facilities. Video cameras will not be used in private areas, such as break rooms, restrooms, locker/dressing rooms, etc. Videotapes will not include an audio component.

### **Introductory Period**

The first three months of your employment is an introductory period. This is an opportunity for the Agency to evaluate the employees' performance. It also is an

opportunity for the employees to decide whether they are happy being employed by the Agency. The Agency may extend the introductory period if it desires. Completion of the introductory period does not alter an employee's at-will status.

HUF will conduct a formal performance review at the end of the introductory period.

### **Employee Service Credit**

Former employees who left the Agency voluntarily and gave their supervisor at least two weeks' notice or were part of a reduction in the workforce in good standing may be considered for reemployment. Former employees who resigned without written notice or who were dismissed for disciplinary and/or other reasons may not be considered for reemployment.

A former employee who is rehired will be considered a new employee from the date of reemployment unless the break in service is less than two months, in which case the employee will retain its original hire date as their seniority date for purposes of some benefits including vacation or personal time accrued. Length of service for the purposes of benefits is governed by the terms of each benefits plan.

"Length of service" refers to the length of time that our employees spend as active full-time or part-time employees with Hispanic Unity of Florida, Inc. Service begins on the day you become a full-time or part-time Employee.

Length of service may be used in determining certain employee benefits, such as time-off benefits. Employees will not lose credit for service with the Agency provided their last day of service was within 60 days of becoming an active employee again. Human Resources will discuss this issue with any rehired employee upon rehire.

### **Employment Classification**

To determine eligibility for benefits and overtime status and to ensure compliance with federal and state laws and regulations, HUF classifies its employees as shown below. HUF may review or change employee classifications at any time.

**Exempt.** Exempt employees, those who are not eligible to receive overtime pay in accordance with applicable laws. Employees classified as exempt receive a salary that is intended to cover all hours worked.

**Non-exempt.** Non-exempt employees are eligible to receive overtime pay for overtime hours worked in accordance with applicable state and federal law.

**Regular, full-time.** Employees who are not in a temporary status work a minimum of 30 hours weekly and maintain continuous employment status. Generally, these employees are eligible for the full-time benefits package and are subject to the terms, conditions, and limitations of each benefits program.

**Regular, part-time.** Employees who are not in a temporary status and who are regularly scheduled to work less than 20 hours weekly and who maintain continuous employment

status. Part-time employees are eligible for some of the benefits offered by the Agency and are subject to the terms, conditions, and limitations of each benefits program.

**Temporary, full-time.** Employees who are hired as interim replacements to temporarily supplement the workforce or to assist in the completion of a specific project and who are temporarily scheduled to work the Agency's full-time schedule for a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status.

**Temporary, part-time.** Employees who are hired as interim replacements to temporarily supplement the workforce or to assist in the completion of a specific project and who are temporarily scheduled to work less than 30 hours weekly for a limited duration. Employment beyond any initially stated period does not in any way imply a change in employment status.

### **Workweek and Hours of Work**

The standard workweek is from Saturday 12:00 AM until Friday 11:59 PM and generally consists of 40 work hours. HUF normally is open for business from 7:30am to 6:00pm, Monday through Friday. The employee will be assigned a work schedule and will be expected to begin and end work according to the schedule. To accommodate the needs of our business, at some point we may need to change individual work schedules on either a short-term or long-term basis. This includes, but is not limited to, certain activities taking place outside normal hours to include nights and weekends. .

### **Meal and Rest Breaks**

Non-exempt employees are entitled to a 60-minute unpaid meal break each day. Any non-exempt employee who is required to work through a meal break will be paid for the 60-minute period. Meal and rest breaks will be scheduled by the department supervisor or manager.

### **Lactation Breaks**

The Agency will provide a reasonable amount of break time to accommodate an employee desiring to express breast milk for their child, in accordance with and to the extent required by applicable law. The break time, if possible and permitted by applicable law, must run concurrently with rest and meal periods already provided. If the break time cannot run concurrently with rest and meal periods already provided, the break time will be unpaid, subject to applicable law. The Agency will make reasonable efforts to provide employees with the use of a room or location near the employees work area, other than a bathroom, to express milk in private. This location may be the employee's private office, if applicable. Please consult HR with questions regarding this policy. Employees should advise management if they need break time and an area for this purpose. Employees will not be discriminated against or retaliated against for exercising their rights under this policy.

## **Time Records**

All non-exempt employees are required to complete accurate weekly time reports showing all time worked. These records are required by governmental regulations and are used to calculate regular, and overtime pay. Employees are strictly prohibited from working “off the clock.” Because employee time records are vital for payroll purposes, non-exempt employees must inform management if they fail or otherwise forget to record their time in or out before or after any working time. Failure to properly record time (including, but not limited to, falsifying time worked reports, card swiping or clocking someone other than yourself in or out of work) may result in discipline, up to and including termination of employment.

In addition, certain exempt employees may be required to track time and effort.

## **Safe Harbor for Exempt Employees**

Employees who are classified as “exempt” from the minimum wage and/or overtime requirements of the federal Fair Labor Standards Act (FLSA) are not subject to salary deductions due to variations in the quality or quantity of the work performed. These employees will receive, subject to certain limited exceptions and permitted deductions set forth below, their full salary for any week in which the employee performs work, without regard to the number of days or hours worked by the employee. The Agency will not take any deductions from an exempt employee’s established salary for absences caused by the Agency or by the Agency’s operating requirements. Moreover, deductions will not be made if, for some reason, the employee is willing to work, but work is not available. In short, exempt employees are paid a consistent salary for the job they perform, and their compensation is not tied to the number of hours they work.

Under federal and state law, your salary is subject to certain deductions. For example, absent contrary state law requirements, your salary can be reduced for the following reasons:

- Full day absences for personal reasons (other than sickness or disability).
- Full day absences for sickness or disability.
- Full day disciplinary suspension for infractions of our written policies and procedures.
- Family and Medical Leave absences (either full or partial day absences).
- To offset amounts received as payment for jury and witness fees or military pay.
- The first or last week of employment if you work less than a full week.
- Any other circumstance permitted by applicable law (e.g., wage garnishment).

Your salary may also be reduced for certain types of deductions such as your portion of health, dental or life insurance premiums; state, federal or local taxes, social security, or voluntary contributions to a 401(k) or pension plan.

In any work week in which you performed any work, your salary will not be reduced for any of the following reasons:

- Partial day absences for personal reasons, sickness, or disability.
- Your absence on the day before or after a paid holiday or because the facility is closed on a scheduled workday.
- Absences for jury duty, attendance as a witness, or military leave in any week in which you have performed any work.
- Any other deductions prohibited by state or federal law.

However, it is not improper to reduce an employee's accumulated vacation, personal time, sick time, or other forms of paid time off for full or partial day absences for personal reasons, sickness, or disability.

If you believe you have been subject to any improper deductions, you are required to report the matter to your supervisor immediately. If the supervisor is unavailable or if you believe it would be inappropriate to contact that person (or if you have not received a prompt and fully acceptable reply), you must contact Human Resources immediately. Every report will be investigated fully, and corrective action will be taken where appropriate, up to, and including, termination of employment for any employee who violates this policy. In addition, the Agency will not allow any form of retaliation against individuals who report alleged violations of this policy or who cooperate in the Agency's investigation of such reports. Retaliation is unacceptable, and any form of retaliation in violation of this policy will result in disciplinary action, up to, and including, termination of employment.

### **Overtime**

When required due to the needs of the business, non-exempt employees may be asked to work overtime. Overtime is actual hours worked more than 40 in a single workweek. Non-exempt employees will be paid overtime compensation at the rate of one and one-half their regular rate of pay for all hours over 40 worked in a single workweek. Paid leave, such as holiday, vacation time, sick time, personal time, bereavement time, and jury duty, does not apply toward work time. All overtime work must be approved in advance by a supervisor or manager.

### **Pay Procedures**

Employees are paid bi-weekly, on every other Friday for all the time worked during the past pay period. Each work week begins on a Saturday and ends on a Friday. Pay periods consist of two (2) work weeks.

By law, the Agency is required to deduct certain withholdings, including social security, federal income tax, any other appropriate taxes and may include any court-ordered garnishments. Payroll statements also will differentiate between regular pay received and overtime pay received.

Other company deductions, such as medical and other group benefit plan premiums, will be made when authorized in writing by the employee. Payment for wages and salaries are made only to company employees. Only pre-approved expenses are reimbursed to employees.

HUF strives to ensure all employees are compensated accurately and in compliance with all applicable state and federal regulations. To ensure that employees are paid appropriately for their time worked and that there are no improper deductions made on the employee's paychecks, employee must promptly review all time worked and pay statements to identify and report any discrepancies as soon as possible. Please contact your immediate supervisor or the Human Resources Department to ask questions and/or concerns regarding pay.

## **Compensation/Direct Deposit**

To minimize fraudulent activities, compensation is paid by two options. An employee can elect to be paid either by direct deposit or have a special "pay" card issued to the employee that is activated by a third-party vendor.

### *1. Direct Deposit:*

The preferred option is for an employee to elect to be paid by direct deposit. Direct Deposit authorization forms are available in the HR department. Initial setup requires the employee to submit a void check with their banking account information.

### *2. Debit / Pay Card:*

This "debit" card grants the employee access to the net payroll funds.

### *3. Checks:*

*Checks* are not the option of standard payments and are only issued in special cases when processing payroll error corrections or an emergency bank closing requirement requested by the employee.

Online pay statements are available 24/7 for active employees and are presented in the payroll system portal. They itemize deductions made from gross earnings.

## **Salary Advances**

Hispanic Unity of Florida, Inc. does not permit advances on paychecks or against accrued paid time off.

## **Pay Transparency Policy Statement**

Hispanic Unity of Florida, Inc., will not discharge or in any other manner discriminate against employees or applicants because they have inquired about, discussed, or disclosed their own pay or the pay of another employee or applicant. However, employees who have access to the compensation information of other employees or applicants as a part of their essential job functions cannot disclose the pay of other employees or applicants to individuals who do not otherwise have access to compensation information, unless the disclosure is: (a) in response to a formal complaint or charge; (b) in furtherance of an investigation, proceeding, hearing or action, including an investigation conducted by the employer; or (c) consistent with the contractor's legal duty to furnish information.

## **Immigration Law Applicable to all Employees**

HUF complies with the Immigration Reform and Control Act of 1986 by employing only individuals who are authorized to work in the United States.

HUF is an E-Verify Agency. E-Verify is an internet-based system that compares information from an employee's Form I-9, Employment Eligibility Verification, to data from U.S. Department of Homeland Security and Social Security Administration records to confirm employment eligibility. As required by federal law, new hires must present documentation of employment authorization within three days of employment and employees with work visas that have an expiration date must provide continued proof of a valid visa or work authorization or face termination.

## **Background Screening**

It is the policy of Hispanic Unity of Florida, Inc., that any applicant being considered for employment must successfully complete a State and National criminal history check as a condition of employment before beginning employment, and be screened in accordance with the requirements of Chapter 435, F.S., and, if applicable, Chapter 408, F.S. No applicant may begin employment until the background investigation results are received, reviewed for any disqualifying offenses, and approved by the Agency. Background investigations shall include, but not be limited to, fingerprinting for State and Federal criminal records checks through the Florida Department of Law Enforcement (FDLE) and Federal Bureau of Investigation (FBI) and may include local criminal history checks through local law enforcement agencies. Employees are also subject to background re-screening at least every five (5) years, based on Level II requirements and/or funder requirements.

## **Level II Background Screening**

In addition, and in compliance with funders/donor requirements, a Level II Background screening will be conducted on all applicants, upon acceptance of employment at HUF.

## **Access to Personnel Files**

Employee files are maintained by the HR department and are considered confidential. Managers and supervisors may only have access to personnel file information on a need-to-know basis. Employees may inspect their own personnel files and may copy them but



may not remove documents from their file. Inspections by employees must be requested in writing to the HR department and will be scheduled at a mutually convenient time or as required under state law. Personnel files are to be reviewed in the HR department. Representatives of government or law enforcement agencies, in the course of their duties, may be allowed access to file information.

### **Relatives and Domestic Partners**

Relatives and domestic partners may be hired by the Agency if (1) the persons concerned will not work in a direct supervisory relationship, and (2) the employment will not pose any conflict with other key positions. The purposes of this policy, “relatives” are defined as spouses, children, siblings, parents, or grandparents. A “domestic partnership” is generally defined as a committed relationship between two individuals who are sharing a home or living arrangements.

Current employees who marry each other or become involved in a domestic partnership will be permitted to continue employment with the Agency provided they do not work in a direct supervisory relationship with each other or with other key positions. If employees who marry or live together do work in a direct supervisory relationship with each other, the Agency will attempt to reassign one of the employees to another position for which the employee is qualified, if such a position is available. If no such position is available, the employees will be permitted to determine which one of them will resign from the Agency.

### **Separation from Employment**

In all cases of voluntary resignation (one initiated by the employee), employees are asked to provide a written notice to their supervisors at least 10 working days in advance of the last day of work. The 10 days must be actual working days. Vacation, personal time, and sick time will not be counted toward the 10-day notice. Employees who provide the requested amount of notice will be considered to have resigned in good standing and generally will be eligible for rehire.

While the decision to commence employment is consensual, the same is not always true when the time comes to end the employment relationship. As an at-will employer the Agency reserves the right to end the employment relationship at any time, with or without cause or notice.

Should it become necessary because of business conditions to reduce the number of employees or work hours, this will be done at the discretion of the Agency.

In most cases, HR will conduct an exit meeting on or before the last day of employment to collect all Agency property and to discuss final pay. If applicable, information regarding benefits continuation through the Consolidated Omnibus Budget Reconciliation Act (COBRA) will be sent to the employee’s home address.

In all termination situations, employees are required to return all property owned by the Agency to Human Resources prior to their departure.

## Workplace Safety

### Drug-Free and Alcohol-Free Workplace

It is the policy of HUF to maintain a drug- and alcohol-free work environment that is safe and productive for employees and others having business with the Agency.

The use, sale, transfer, possession, or being under the influence of alcohol, drugs, or controlled substance, when on duty, on HUF property, or in Agency vehicles or while driving a personal vehicle for HUF business), is prohibited. Employees and other individuals who work for HUF also are prohibited from reporting to work or working while they are using or under the influence of alcohol, any drugs, as well as any controlled substances, that may impact an employee's ability to perform his or her job or otherwise pose safety concerns, except when the use is pursuant to a licensed medical practitioner's instructions and the licensed medical practitioner authorized the employee or individual to report to work. However, to the extent permitted by and in accordance with applicable law, this exception does not extend any right to report to work under the influence of medical marijuana or to use medical marijuana as a defense to a policy violation or a positive drug test, to the extent that you are subject to any drug testing requirement. This policy applies to all employees, except those covered by state or federal regulations related to drug testing (such as the U.S. Department of Transportation).

To ensure compliance with this policy, substance abuse screening may be conducted in the following situations:

**For cause:** Upon reasonable suspicion that the employee is under the influence of alcohol or drugs that could affect or have adversely affected the employee's job performance.

**For workplace accidents:** Employees may be required to submit to a drug and alcohol test, post-accident or after first report of injury, at a location specified by the Agency or the workers' compensation insurance carrier's specified location. Determination to conduct a post incident drug and alcohol test will be made per the Agency and Alcohol-Free Workplace Policy. Workers' compensation benefits may be denied if a Team Member fails to submit to a drug and alcohol test after reasonable suspicion has been determined or if a positive test is confirmed.

Compliance with this policy is a condition of employment. Employees who test positive or who refuse to submit to substance abuse screening will be subject to termination. Notwithstanding any provision herein, this policy will always be enforced in accordance with applicable law.

## **Smoke-Free Workplace**

HUF is committed to providing a safe and healthy workplace and to promoting the health and well-being of its employees. As such, the following policy has been adopted and applies to all employees, contractors, and visitors of HUF.

It is the policy of HUF to prohibit smoking and vaping on all Agency premises to provide a safe and healthy work environment for all employees. Smoking is defined as the "act of lighting, smoking or carrying a lighted or smoldering cigar, cigarette or pipe of any kind." Vaping refers to the use of electronic nicotine delivery systems or electronic smoking devices such as e-cigarettes, e-pipes, e-hookahs, and e-cigars. Violation of this policy may result in disciplinary action, up to and including termination of employment.

## **Scope**

This policy applies to:

- All areas of buildings occupied by Agency employees.
- All Agency-sponsored offsite conferences and meetings.
- All vehicles owned or leased by the Agency.
- All Agency employees, visitors, clients, vendors, etc.

## **Workplace Violence Prevention**

HUF is committed to providing a safe, violence-free workplace for our employees. Due to this commitment, we discourage employees from engaging in any physical confrontation with a violent or potentially violent individual or from behaving in a threatening or violent manner. Threats, threatening language, or any other acts of aggression or violence made toward or by any employee will not be tolerated. A threat may include any verbal or physical harassment or abuse; attempts to intimidate others; menacing gestures; stalking; or any other hostile, aggressive, and/or destructive actions taken for the purposes of intimidation. This policy covers any violent or potentially violent behavior that occurs in the workplace or at Agency-sponsored functions.

All HUF employees bear the responsibility of keeping our work environment free from violence or potential violence. Any employee who witnesses or is the recipient of violent behavior should promptly inform their supervisor, manager, or HR department. All threats will be promptly investigated. No employee will be subject to retaliation, intimidation, or discipline because of reporting a threat in good faith under this guideline.

Any individual engaging in violence against the Agency, its employees, or its property will be prosecuted to the full extent of the law. All acts will be investigated, and the appropriate action will be taken. Any such act or threatening behavior may result in disciplinary action up to and including termination.

HUF always prohibits the possession of weapons on its property. Additionally, while on duty, employees may not carry a weapon of any type. This policy extends to HUF facilities and/or when performing work on behalf of HUF regardless of the location. Weapons include, but are not limited to, handguns, rifles, automatic weapons, knives that can be used as weapons (excluding pocketknives, utility knives, and other instruments that are used to open packages or cut string and for other miscellaneous tasks), martial arts paraphernalia, stun guns, and tear gas. Any employee violating this policy is subject to discipline up to and including dismissal for the first offense. However, this prohibition does not apply to the extent it is otherwise restricted by applicable state law.

The Agency reserves the right to inspect all belongings of employees on its premises, including packages, briefcases, purses and handbags, gym bags, and if required may search a personal vehicle on Agency property when accompanied by Law Enforcement. In addition, HUF may inspect the contents of lockers, storage areas, file cabinets, desks, and workstations at any time and may remove all Agency property and other items that are in violation of agency rules and policies.

### **Commitment to Safety**

Protecting the safety of our employees and visitors is the most important aspect of running our business.

All employees have the opportunity and responsibility to contribute to a safe work environment by using commonsense rules and safety practices and by notifying management when any health or safety issues are present. All employees are encouraged to partner with management to ensure maximum safety for all.

In the event of an emergency, notify the appropriate HUF manager on duty of your program/site and when necessary, immediately call 911 to activate the medical emergency services.

Any workplace injury, accident, or illness must be reported to the employee's supervisor as soon as possible, regardless of the severity of the injury or accident.

### **Emergency Closing / Severe Weather Conditions**

At times, emergencies such as severe weather, fires, hurricanes and/or power failures can disrupt office operations. In extreme cases, these circumstances may require the office to close.

When operations are officially closed due to emergency conditions, the time off from scheduled work may be paid at the sole discretion of management. The ability of the HUF to continue normal payroll will be contingent upon the availability of cash resources, as well as the extent, severity, and duration of the emergency closing.

Employees in essential operations may be asked to work on a day when operations are officially closed. In these circumstances, employees who work will receive regular pay.

**For other Disaster Preparedness information, please contact your supervisor or the Department Director for information that impacts on your department and/or**

**position.**

## **Visitors**

To maintain security and safety for our employees, HUF has the following policy with respect to visitors:

- All visitors must check in with the receptionist, must wear a visitor's badge, and must be escorted by an employee.
- This policy applies to anyone who is not an active employee, including employees on leave, former employees, vendors, and suppliers.
- Generally, friends and family members are not permitted to visit employees at the workplace.
- When employees have any doubt whether a person can visit, they should contact the HR department.

## **Workplace Guidelines**

### **Attendance**

All employees are expected to arrive on time, ready to work, every day they are scheduled to work.

If unable to arrive at work on time, or if an employee foresees being absent for an entire day, the employee must contact the supervisor as soon as possible on the day of absence. Proper notification of absenteeism would include the employee contacting and speaking with their supervisor. Excessive absenteeism or tardiness will result in discipline up to and including termination. Failure to show up or call in for a scheduled workday without prior approval also may result in discipline up to and including termination. If an employee fails to report to work or call in to inform the supervisor of the absence for three (3) consecutive days or more, the employee will be considered to have voluntarily resigned from employment.

### **Performance Review**

Depending on the employee's position and classification, HUF endeavors to review performance annually. However, a positive performance evaluation does not guarantee an increase in salary, a promotion or continued employment. Compensation increases and the terms and conditions of employment, including job assignments, transfers, promotions, and demotions, are determined by and at the discretion of management.

In addition to these formal performance evaluations, the Agency encourages employees and supervisors to discuss job performance on a frequent and ongoing basis.

### **Job Postings**

HUF is dedicated to assisting employees in managing their careers and reaching their professional goals through promotion and transfer opportunities. This policy outlines the

electronic job posting program which is in place for all employees. To be eligible to apply for an open position, employees must meet several requirements:

- Should be a current, regular, full-time, or part-time employee
- Been in your current position for at least six months
- Maintain a performance rating of satisfactory or above
- Should not be on an employee conduct/performance-related probation or warning
- Must meet the job qualifications listed on the job posting
- Required to provide the employee's manager with notice prior to applying for the position

Anyone interested in applying for a job should first contact their supervisor and complete an internal transfer form, which must be signed by their supervisor. If the employee meets the eligibility requirements, an internal job application must be completed to be considered for the position. Not all positions are guaranteed to be posted. The Agency reserves the right to seek applicants solely from outside sources or to post positions internally and externally simultaneously.

### **Open Door Policy**

The purpose of the open-door policy is to encourage open communication, feedback, and discussion about any matter of importance to an employee.

**Responsibilities under the Open Door Policy:** If any area of an employee's work is causing them concern, the employee has the responsibility to address their concern with a manager.

Whether an employee has a problem, a complaint, a suggestion, or an observation, the Agency's HR team wants to hear from the employee. By listening to the employee, the Agency can improve, address complaints, and foster employee understanding of the rationale for practices, processes, and decisions.

**Before You Pursue the Open Door Policy:** Most problems can and should be solved in discussion with an employee's immediate supervisor; this is encouraged as the first effort to solve a problem. But the open-door policy means that an employee may also discuss the employee's issues and concerns with the next levels of management.

### **Conduct and Expectations**

In addition to the policies noted above, the following guidelines are designed to protect our employees, property, clients, and business operation. An employee is expected to always conduct himself or herself in a manner that will reflect favorably upon the Agency. In addition to being trustworthy, an employee's behavior must reflect the highest standards to maintain a safe, productive, quality-focused, and disciplined work environment. An Employee should:

- Be respectful, civil, and courteous always to fellow employees, clients, and vendors. Examples of unprofessional and inappropriate behavior include, but are not limited to, cursing, yelling, or withholding information needed to assist

someone in their work. Thus, any other behavior that is contrary to common sense or is obviously wrong or improper will also bring the same exposure to discipline.

- Act as a role model for fellow employees, set good examples for work habits and attitudes, and support Agency programs.
- Treat each other with dignity and respect.
- Adhere to all policies of the Agency.
- Promote an environment free of physical, sexual, visual, and verbal harassment.
- Treat confidential Information in a discreet manner, whether it is Agency business or an employee's personal business.
- Encourage fellow employees to always use good judgement and discretion.
- Maintain a safe, clean, orderly, healthy, and productive work environment.
- Encourage fellow Employees to assume personal responsibility for their performance and to continually strive for excellence.

These Guidelines for Conduct do not alter an employee's at-will employment relationship with the Agency. While the Agency may terminate an employee's employment for violation of any rule, procedure, or policy, the Agency may also terminate an employee's employment without cause, for any reason not prohibited by law. Likewise, an employee may also terminate the employment relationship at any time, for any reason, or for no reason.

### **Prohibited Conduct**

To ensure orderly operations and provide the best possible work environment, HUF expects employees to follow rules of conduct that will protect the interests and safety of personnel. It is not possible to list all the forms of behavior that are considered unacceptable in the workplace, but the following are examples of infractions of rules of conduct that may result in disciplinary action, including suspension, demotion, or termination of employment:

1. Falsification of employment records, employment information, or other records.
2. Recording the working time of another employee, allowing any other employee to record your work time, or allowing falsification of any timecard, whether your own or another employee's.
3. Theft or damage of any Agency property or the property of any employee or client. The Agency is not responsible for the loss or theft of any employee's personal property.
4. Removing or borrowing Agency property without prior authorization.
5. Unauthorized use of Agency equipment, time, materials, or facilities.
6. Possessing, distributing, selling, transferring, using, or having alcohol or illegal drugs in your system while in the workplace.
7. Provoking or participating in a fight or fighting during working hours or on premises owned or occupied by the Agency.

8. Taking pictures, videos, or recording conversations of other employees, vendors, or clients while at work if not pre-approved by your immediate supervisor.
9. Provoking or participating in horseplay or practical jokes on the Agency's time or on premises owned or occupied by the Agency.
10. Possession of firearms or any other dangerous weapons, at any time, on premises owned or occupied by the Agency, except as otherwise permitted by applicable law.
11. Engaging in illegal conduct which is detrimental to the reputation of the Agency, whether related to job performance or not.
12. Causing, creating, or participating in a disruption of any kind during working hours or on premises owned or occupied by the Agency.
13. Gossiping
14. Insubordination, including but not limited to failure or refusal to obey the orders or instructions of any Supervisor or member of management, the use of abusive or threatening language toward any Supervisor or member of management, or refusal to fully disclose information during Agency investigations.
15. Being disrespectful or using profane or abusive language at any time during working hours or while on premises owned or occupied by the Agency.
16. Failing to personally notify the appropriate Supervisor when unable to report to work.
17. Unreported absence of three consecutive scheduled workdays.
18. Failing to obtain permission from your immediate supervisor to leave work for any reason during normal working hours.
19. Failing to observe working schedules, including rest and lunch periods.
20. Sleeping or malingering on the job.
21. Making or accepting for improper purposes personal telephone calls during working hours.
22. Working overtime without authorization or refusing to work assigned overtime.
23. Violating any safety, health, or security policy, rule, or procedure of the Agency.
24. Committing a fraudulent act, dishonest act, breach of trust, or violating the duty of loyalty to the Agency in any circumstances.
25. Failing to maintain confidential or proprietary information or Agency trade secrets or engaging in direct competition with the Agency.

Although employment may be terminated at will by either the employee or the Agency at any time, without following any formal system of discipline or warning, the Agency may exercise its discretion to utilize forms of discipline that are less severe than termination. Examples of less severe forms of discipline include verbal counseling, confirmation of conversation, written counseling, demotions, and suspension. While one or more of these forms of discipline may be taken in connection with a particular employee, no formal order or procedures are necessary.



## Progressive Discipline Program

The Agency's own best interest rests in ensuring fair treatment of all employees and in making certain that disciplinary actions are prompt, uniform, and impartial. The primary objective of any disciplinary action is to provide a structured corrective action process to improve and prevent a recurrence of undesirable employee behavior and performance issues.

The Agency's approach to discipline focuses on encouraging good performance and on supporting employees in resolving any behavior and/or performance issue, should they occur. This results in a more positive working environment for everyone.

Outlined below are the steps of the progressive disciplinary policy and procedures. The Agency reserves the right to combine or skip steps depending on the facts of each situation and the nature of the offense, including skipping directly to termination but without necessarily meeting Step 4's criteria. Some of the factors that will be considered are whether the offense is repeated despite coaching, counseling, or training; the employee's work record; and the impact the conduct and performance issues have on the organization.

<b>PROGRESSIVE DISCIPLINE STEPS</b>	<b>ACTION TAKEN</b>	<b>DESCRIPTION</b>
<b>STEP 1:</b>	Verbal Warning	Informal in nature. Used to inform and redirect the employee, to communicate expectations.
<b>STEP 2:</b>	Confirmation of Conversation (COC)	Multiple minor violations, documented, or more serious violations.
<b>STEP 3:</b>	Written Counseling	Serious infractions or previous violations.
<b>STEP 4:</b>	Suspension/Termination	Gross disregard of rules, policies, procedures, or previous violations.

## Conduct and Employment Outside Work

Employees generally are permitted to work a second job if it does not interfere with their job performance or create a conflict of interest with HUF. All employees, including part-time employees, must disclose to the HR department before undertaking any outside employment or other work activity. The Agency will not tolerate off-duty conduct that impacts negatively on the Agency in terms of an Employee's individual work performance or the business interests of the Agency, including its reputation. Also, the Agency prohibits outside employment (including self-employment) that conflicts with employment at HUF, impacts the employee's work performance or schedule, and/or affects the business interests of the Agency. Agency

Employees with a second job are expected to work their assigned schedules. A second job will not be considered an excuse for poor job performance, absenteeism, tardiness, leaving early, refusal to travel, or refusal to work overtime or different hours. In addition, employees who have accepted outside employment may not use paid sick time to work on the outside job. However, an employee on a leave of absence may continue to work in the outside job if this employment has been approved by the Agency under this policy and the employee's reason for leave does not preclude outside employment.

If outside work activity causes or contributes to job-related problems, it must be discontinued, or the employee may be subject to disciplinary action up to and including termination.

### **Attire, Appearance, and Hygiene**

HUF strives to maintain a workplace environment that functions well and is free from unnecessary distractions. As part of that effort, the Agency requires employees to maintain a neat and clean appearance that is appropriate for the workplace setting and for the work being performed. HUF department heads may determine and enforce guidelines for workplace-appropriate attire and grooming for their areas, including natural or artificial scents that could be distracting or irritating to others.

#### **Specific requirements**

Certain employees may be required to meet special attire, grooming and hygiene standards, such as wearing uniforms or protective clothing, depending on the nature of their job or meeting with outside stakeholders. Uniforms and protective clothing may be required for certain positions and will be provided to employees by HUF.

At the discretion of the department head, in special circumstances, such as during unusually hot or cold weather or during special occasions, employees may be permitted to dress in a more casual fashion than is normally required. On these occasions, employees are still expected to present appropriately and are not permitted to wear ripped, frayed, or disheveled clothing or athletic wear. Likewise, inappropriate attire is not permitted.

#### **Reasonable accommodation of religious beliefs**

HUF recognizes the importance of individually held religious beliefs to persons within its workforce. HUF will reasonably accommodate an employee's religious beliefs in terms of workplace attire unless the accommodation creates an undue hardship.

Accommodation of religious beliefs in terms of attire may be difficult considering safety issues for employees. Those requesting workplace attire accommodation based on religious beliefs should be referred to the human resources department.

In any event, employees may NEVER:

- Wear attire that exposes cleavage, the mid-section, the back, or shoulders,
- Wear dresses or skirts that are excessively short,
- Wear clothing that is ill fitting (too tight or too baggy), as it gives a sloppy appearance,
- Wear anything that is sheer or reveals undergarments
- Wear shorts, hats or caps, shirts with straps, loud or offensive t-shirts, or flip-flop sandals,
- Be present in any attire that is inappropriate in an office setting (for example, attire that is potentially harmful to client/customer relations or that would violate any Company policy).

### **Addressing workplace attire and hygiene problems**

Violations of this policy can range from inappropriate clothing items to offensive perfumes and body odor. If an employee comes to work in inappropriate attire, they will be required to go home, change into conforming attire, or properly groom, and return to work at the employee's expense.

If an employee's poor hygiene or use of perfume/cologne is offensive or disrupts the workplace, the supervisor should discuss the problem with the employee **in private** and should point out the specific areas to be corrected. If the problem persists, supervisors should follow the normal progressive discipline process.

### **Operation of Vehicles**

All employees authorized or required to drive a motor vehicle in conducting Agency business must possess a current, valid driver's license, insurance, and an acceptable driving record. Any change in license status or driving record must be reported to management immediately. An employee's Motor Vehicle Record (MVR) will be obtained for every employee covered by the policy upon hire and every year thereafter.

An employee must have a valid driver's license in their possession while operating a vehicle off or on Agency property. It is the responsibility of every employee to drive safely and obey all traffic, vehicle safety, and parking laws or regulations. Drivers must always demonstrate safe driving habits.

Employees may be asked to operate their own vehicles as part of their job duties for the Agency. During such an operation, employees are expected to always exercise good judgment and safe-driving practices, including avoiding any activity which may distract their attention from the road or violate any law. Such activity includes speeding or other reckless driving, ingesting alcoholic beverages, or even unsafe use of a cell phone, texting and e-mailing, which is prohibited in all circumstances.

Employees who fail to maintain a safe driving record (MVR) or operate a motor vehicle in an unsafe manner are subject to disciplinary action, up to and including termination of employment.

Accidents in personal vehicles while on Agency business **must** be reported to the police and to the manager/supervisor, regardless of severity. Accidents involving personal injury to an employee must be reported to the manager/supervisor for Worker's Compensation purposes. Failing to stop after an accident and/or failure to report an accident may result in disciplinary action, up to and including termination of employment.

## **Cell Phone Safety and Driving**

Florida law prohibits texting while driving. Safe driving is the priority when operating a vehicle while driving on HUF business. Your first responsibility is to pay attention to your driving. Never allow a cell phone or other mobile device to distract you from concentrating on driving.

Under no circumstances should you feel that you need to place yourself or others at risk while driving to fulfill business needs. You should follow these procedures to avoid distracted driving:

- Avoid using your cell phone while driving, and do not use it as a hand-held device. Find a safe place to pull over to make or receive phone calls, send, or receive text messages, or manipulate navigation apps.
- Program your destination into navigation apps or GPS devices before you start driving.
- Do not read or respond to text messages or e-mail or browse social media or the internet while driving.
- Be aware of distractions from in-car “infotainment” systems. Just because they are built into the vehicle does not mean they do not create a hazardous distraction.

Employees who fail to follow safety guidelines are subject to discipline up to and including termination.

## **Social Media Acceptable Use**

HUF encourages employees to share information with coworkers and with those outside the Agency for the purposes of gathering information, generating new ideas, and learning from the work of others. Social media provides inexpensive, informal, and timely ways to participate in an exchange of ideas and information. However, information posted on a website is available to the public, and therefore, the Agency has established the following guidelines for employee participation in social media.

**Note:** As used in this policy, “social media” refers to blogs, forums, and social

networking sites, such as Twitter, Facebook, LinkedIn, YouTube, Instagram, TikTok and Snapchat, among others.

**Off-duty use of social media.** Employees may maintain personal websites or weblogs on their own time using their own facilities. Employees must ensure that social media activity does not interfere with their work. In general, the Agency considers social media activities to be personal endeavors, and employees may use them to express their thoughts or promote their ideas. In addition, employees may not post on a personal blog or webpage or participate on a social networking platform for personal purposes during work time or at any time with HUF equipment or property.

**On-duty use of social media.** Employees may engage in social media activity during work time provided it is directly related to their work and approved by their manager and does not identify or reference Agency clients, clients, or donors without express permission. The Agency monitors employee use of Agency computers and the internet, including employee blogging and social networking activity.

**Respect.** Employees are expected to demonstrate respect for the dignity of the Agency, its board members, its clients, its vendors, and its fellow employees. A social media site is a public place, and employees should avoid inappropriate comments. For example, employees should not divulge HUF confidential information such as trade secrets, client lists, or information restricted from disclosure by law on social media sites. Similarly, employees should not engage in harassing or discriminatory behavior that targets other employees or individuals because of their protected class status or make defamatory comments or engage in other behavior that violates the Agency's policies.

**Post disclaimers.** Employees cannot identify themselves as Agency employees or discuss matters related to the Agency social media site. Employees must keep in mind that if they post information on a social media site that is in violation of Agency policy and/or federal, state, or local law, the disclaimer will not shield them from disciplinary action.

**Competition.** Employees should not use social media to criticize the Agency's competition and should not use it to compete with the Agency.

**Confidentiality.** Do not identify or reference Agency clients, clients, or vendors without express permission. Employees may write about their jobs in general but may not disclose any confidential or proprietary information. For examples of confidential information, please refer to the confidentiality policy. If in doubt, ask before publishing.

**New ideas.** Please remember that new ideas related to work, or the Agency's business belong to the Agency. Do not post them on a social media site without the Agency's permission.

**Trademarks and copyrights.** Do not use the Agency's or others' trademarks on a social media site or reproduce the Agency's or others' material without first obtaining permission.

**Legal.** Employees are expected to comply with all applicable laws, including, but not limited to, Federal Trade Commission (FTC) guidelines and copyright, trademark, and harassment laws.

**Confidentiality, Electoral Process and Social Media.** Hispanic Unity of Florida, Inc., (HUF) is a non-partisan, 501 (c) (3), community-based organization that encourages the informed and active participation of citizens in the electoral process and seeks to influence public policy through education and advocacy. HUF's non-partisan policy means that it will not support or oppose any political party or candidate for public office. The Board of Directors and staff at HUF have knowledge of HUF's policy against using the Agency's resources for supporting or opposing candidates. HUF as a 501(c) (3) organization will not allow its employees to use the organization's property to conduct political activity. HUF staff may not use their social media work accounts and work email accounts to send their friends messages supporting candidates.

**Discipline.** Violations of this policy may result in discipline up to and including immediate termination of employment.

Nothing in this policy is meant to, nor should it be interpreted to, in any way limit your rights under any applicable federal, state, or local laws, including your rights under the National Labor Relations Act, to engage in protected concerted activities with other employees to improve or discuss terms and conditions of employment, such as wages, working conditions, and benefits. Employees have the right to engage in or refrain from such activities.

## **Remote Policy**

Hispanic Unity of Florida, Inc. (HUF) is committed to achieving our shared goals and fostering an organizational environment which supports and values the work of all HUF members through different approaches to workplace schedule and locations as deemed appropriate for each employee and position. Neither arrangement changes the at-will nature of the employment relationship.

### **Goal**

Create a clear understanding and criteria for HUF supervisors and employees regarding remote work and the specific roles of those employees assigned within the organization. This policy will ensure that remote work aligns with HUF's goals to ensure delivery of quality services to our community and required outcomes are met.

### **What Is Hispanic Unity of Florida's View on Remote Work?**

HUF permits certain job functions to be performed outside its offices. Work performed remotely must be of the same quality away from the office as that done in the office. Workers must possess the skills, experience, work habits, and environment to enable them to conduct job tasks with limited direct supervision. The location of the workplace

does not change the job; it changes the environment in which the job is performed. The program does not supersede other existing policies, practices, and procedures established by Hispanic Unity of Florida, Inc. The programs HUF provides to the community lead the criteria for remote work allowed by position to ensure service quality or organizational operations are not impacted.

### **Designated Remote Work Location**

All HUF employees must reside within the tri-county area (Miami/Broward/Palm Beach). Employees must perform all work in the jurisdiction that is designated as their remote work location. Hispanic Unity of Florida provides its services to clients within the tri-county South Florida region and sometimes expands across the USA depending on the program. Therefore, all employees must be available to attend in-person meetings and functions as needed by the Agency. Employees must obtain written pre-approval to change their remote work location, and the failure to do so may result in disciplinary action, up to and including termination.

### **What Is Remote Work?**

Remote work is a work arrangement for employees to perform work duties at home or an alternate worksite away from the office. It is a voluntary work practice that combines flexibility in the workplace with appropriate technology and may be utilized on a regular schedule or periodically with pre-approval. Participation will be subject to meeting certain eligibility and selection criteria as set forth in this policy.

### **Definitions of types of Remote Work**

#### Position Suitability

1. A position that is suitable for remote work is one that has responsibilities that can be successfully conducted through remote work, using basic telecommunications technology at home without affecting service quality or organizational operations.

#### Hybrid - Ongoing remote work, regular schedule

2. Employees work from home on specific agreed upon day(s) to maximize productivity.
3. An employee is a self-motivated, high performer who thrives in an independent work environment, but is also needed onsite for projects or team activities.
4. Require little face-to-face interaction with staff or the clients.
5. Must be available to report to the office when requested by the Manager.
6. When an employee is required to come to a work location it is not considered an expense reimbursement.
7. Must be available to respond to emails and phone calls with urgency during HUF

employee's assigned work schedule.

8. Due to space limitations at HUF, some positions alternate their on-site schedule. In those cases, work arrangements are considered hybrid and will be subject to alternating schedules as assigned and approved by Program Supervisor and Program Director.

Occasional - Infrequent, not regularly scheduled

9. This is defined as an employee who works from home due to a workplace disruption, inclement weather, or suspended operations as pre-approved by supervisor or as required to meet deadlines of an exempt position.

**Who Is Eligible?**

The following eligibility requirements will be considered for remote or hybrid work:

- A. Employees with jobs that require specialized equipment or employee presence in the office are not eligible to work remotely.
- B. Home office, alternate location, and schedule – Employees must have a dedicated work area at home or other suitable location that meets the requirements of remote work, with secure internet at their own cost and adhere to agree upon work hours. The home office or alternate location must also maintain the appropriate privacy and confidentiality of the work based on position. The home office where the employee will hold video meetings must be neat and have a clean appearance. The work location for the business meeting must be suitable and presentable for all video meetings.
- C. A secure internet connection is defined as being a wireless internet connection that is encrypted in one or more ways (password-protected, etc.) to ensure the security of data and information.
- D. Employee performance – Employees must have a history of satisfactory performance or better and must demonstrate appropriate employee conduct as stipulated in the employee handbook. Employees are expected to comply with all HUF policies when working remotely.
- E. All meetings with HUF clients should take place in Hispanic of Florida designated sites as approved by their supervisor.

**How Does the Policy Work?**

A. Approving Remote Schedule

1. Each position and candidate will be considered on a case-by-case basis.
2. HUF's Senior Management will make the final decision on whether a position is eligible for remote work and whether an employee can continue in this capacity based on management's approval and recommendation.
3. The supervisor will provide an employee with ongoing feedback on their performance including remote expectations.



4. Both parties should report any concerns immediately to HR.
5. HUF reserves the right to cancel remote work authorization at any time and have the employee perform their work at one of HUF's offices. HUF will provide reasonable notice for an employee to plan accordingly for long-term cancellations. A reasonable notice may be defined as up to two weeks' notice. Two weeks' notice may not be given in certain situations. This does not include off-site pre-planned program events/activities tied to an employee's designated department.

#### B. Work Schedule

1. Eligible employees are responsible for adhering to the agreed upon schedule.
2. Routine remote work must occur on the pre-approved days and times.
3. Irregular remote work which occurs episodically must be pre-approved by your supervisor.
4. Designated work from home days may not be exchanged or moved without prior approval of the supervisor.
5. An employee must adhere to HUF's policy of requesting use of vacation, personal, or sick time including but not limited to the times the employee is working remotely. A supervisor and an employee are both required to report use of vacation, personal, or sick time that falls into any extended leave that requires additional validations and medical clearance approvals. Some examples include but are not limited to, FMLA. An extended leave is defined as missing work for 3 or more days for medical reasons. If this should occur, the supervisor and the employees should coordinate with their immediate supervisor and human resources.
6. For exempt employees, it is imperative that these staff members meet their deadlines and goals within established timeframes of their position.

#### C. Job Performance

1. The employee working remotely is held to the same standard of performance as employees who work on-site.
2. Indicators of performance and productivity are established by the supervisor as a part of the *remote work arrangement and as outlined in an employee's job description*.

#### D. Intellectual Property and Proprietary and Confidential Information

1. As described in the HUF's Employee Handbook, all work prepared by the remote worker in any form is the sole and exclusive property of HUF.
2. All information and materials created or provided during remote and/on-site work are critical and valuable organizational resources, and constitute the intellectual property of HUF, including but not limited to databases, publications, business information, all electronic communications, and all information on the HUF website and servers (local or cloud-based).

#### E. Equipment and Software

1. HUF owned computer and software policies are applicable to all employees regardless of remote or in-person. This includes, but is not limited to, employees being responsible for safeguarding and securing all property being used at home, business travel or other remote location.
2. The Agency, through IT, may limit and/or monitor employee access and activity on any HUF assigned system while working under a remote or hybrid arrangement. To this end, the Agency may use remote administration software to examine stored files, review, or confirm system configurations, and install software to regularly monitor remotely connected systems. Employees connecting to Agency systems consent to such remote monitoring conducted and as such should not expect that connecting to the Agency systems under any arrangement entitles them to any expectation of privacy in anything that they access, view, create, store, transmit or receive on or through the Information Systems, including any personal messages.
3. Computer data files produced in the course of your work are the property of HUF. They should be organized and maintained in a manner that facilitates retrieval by others in the event such access is needed.
4. All work files should be stored based on HUF's IT policies and restricted to authorized use only. This includes but is not limited to HUF's network and third- party software platforms.
5. Saving documents that need to be accessed by other staff members to any employee's personal drive or external drive is prohibited.

#### F. Health and Safety

Employees must maintain safe conditions in the remote workspace and to practice no less than the same safety habits and rules as those applied on the Agency's premises. The employee is responsible for regularly checking their workspace to ensure it complies with all safety requirements and is liable for any injuries sustained by visitors to their remote workspace. Employees must notify the Agency of any injury that arises out of the course of employment in the remote workplace and the Agency may open a Workers' Compensation claim if applicable. All job-related accidents must be reported immediately (and no later than the next working day) to the employee's supervisor for investigation. Compensability for work-related injuries sustained by an employee in their remote workspace will be determined using the same factors as employees working on- site. See Workplace Safety policy for more information.

#### G. Important Information for Non-Exempt Employees

Non-exempt employees are responsible for keeping accurate records of their scheduled workday and actual hours worked. Employees will be required to clock in and clock out in accordance with applicable Agency policies and from their designated work location. All overtime worked must be authorized in advance by the employee's supervisor in accordance with the Agency policies. Falsifying or tampering with the recording of time may result in disciplinary action up to and including termination of employment. Employees may not work any hours outside of their designated work schedule without prior authorization from their supervisor.

## **Bulletin Boards**

All required governmental postings are posted on the boards located in the break room. These boards may also contain general announcements. This will assist employees in keeping up with what is current at HUF. To avoid confusion, employees should not post or remove any material from the bulletin board.

Nothing in this policy is meant to, nor should it be interpreted to, in any way limit your rights under any applicable federal, state, or local laws, including your rights under the NLRA to engage in protected concerted activities with other employees to improve or discuss terms and conditions of employment, such as wages, working conditions, and benefits. Employees have the right to engage in or refrain from such activities.

## **Solicitation**

Employees should be able to work in an environment that is free from unnecessary annoyances and interference with their work. To protect our employees and visitors, solicitation by employees is strictly prohibited while either the employee being solicited or the employee doing the soliciting is on “working time.” “Working time” is defined as time during which an employee is not at a meal, on break, or on the premises immediately before or after a shift.

Nonemployees may not trespass or solicit or distribute materials anywhere on Agency property at any time.

Nothing in this policy is meant to, nor should it be interpreted to, in any way limit your rights under any applicable federal, state, or local laws, including your rights under the NLRA to engage in protected concerted activities with other employees to improve or discuss terms and conditions of employment, such as wages, working conditions, and benefits. Employees have the right to engage in or refrain from such activities.

## **Computers, Internet, E-Mail, and Other Resources**

HUF provides a wide variety of communication tools and resources to employees for use in running day-to-day business activities. Whether it is the telephone, voicemail, scanner, Internet, intranet, e-mail, text messaging, portable electronic devices, or any other Agency-provided technology, use should be reserved for business-related matters during working hours. All communication using these tools should be handled in a professional and respectful manner.

Employees should not have any expectation of privacy in their use of Agency computers, phones, portable electronic devices, or other communication tools. All communications made using Agency-provided equipment or services, including e-mail and Internet activity, are subject to inspection by the agency. Employees should keep in mind that even if they delete an e-mail, a voicemail, or another communication, a copy may be archived on the Agency’s systems.

Employee use of Agency-provided communication systems, including personal e-mail and Internet use, that is not job-related has the potential to drain, rather than enhance, productivity and system performance. You should also be aware that information transmitted through e-mail and the internet is not completely secure or may contain viruses or malware, and information you transmit and receive could damage the Agency's systems, as well as the reputation and/or competitiveness of the Agency. To protect against possible problems, delete any e-mail messages before opening that are received from unknown senders and advertisers. It is also against Agency policy to turn off antivirus protection software or make unauthorized changes to system configurations installed on agency computers. Violations of this policy may result in termination for a first offense.

The Agency encourages employees to use e-mail only to communicate with fellow employees, suppliers, clients, or potential clients regarding Agency business. Internal and external e-mails are considered business records and may be subject to federal and state recordkeeping requirements, as well as to be discovered in the event of litigation. Be aware of this possibility when sending e-mails within and outside the Agency.

All use of Agency provided communications systems, including e-mail and internet use, should conform to our Agency guidelines/policies, including but not limited those related to Equal Opportunity, Harassment, Confidential Information, and Conflicts of Interest. So, for example, employees should not engage in harassing or discriminatory behavior that targets other employees or individuals because of their protected class status or make defamatory comments. Similarly, employees should not divulge confidential information such as trade secrets, client lists, or information restricted from disclosure by law on social media sites.

Because e-mail, telephone and voicemail, and internet communication equipment are provided for Agency business purposes and are critical to the Agency's success, your communications may be accessed without further notice by IT department administrators and Agency management ensure compliance with this guideline.

The electronic communication systems are not secure and may allow inadvertent disclosure, accidental transmission to third parties, etc. Sensitive information should not be sent via unsecured electronic means.

Employees should pay particular care to the use and security of portable electronic devices when used for business-related purposes, such as laptops, tablets, smartphones, and other data storage media, whether provided by the employer or the employee. Lost or stolen portable electronic devices containing Agency information may cause breaches of security that result in the loss of Agency confidential commercial data, the loss of vital research data, the unauthorized disclosure of sensitive employee data, lawsuits against the individual, and lawsuits against the Agency. Employees should use appropriate password protection for such devices and physically secure them as recommended by IT department administrators.

Office telephones are for business purposes. While the Agency recognizes that some personal calls are necessary, these should be kept as brief as possible and to a minimum. Personal use of the Agency's cell phones, long-distance accounts, or toll-free numbers is

strictly prohibited. Abuse of these privileges is subject to corrective action up to and including termination.

The Agency reserves the right to monitor client calls to ensure employees abide by Agency quality guidelines and provide appropriate levels of client service. Should the subject matter of any telephone conversation become personal while monitoring is taking place, monitoring of the call will immediately be discontinued.

Nothing in this policy is meant to, nor should it be interpreted to, in any way limit your rights under any applicable federal, state, or local laws, including your rights under the NLRA to engage in protected concerted activities with other employees to improve or discuss terms and conditions of employment, such as wages, working conditions, and benefits. Employees have the right to engage in or refrain from such activities.

### **Facilities, Equipment & Property, Including Intellectual Property**

Equipment essential in accomplishing job duties is often expensive and may be difficult to replace. When using property, employees are expected to exercise care, perform required maintenance, and follow all operating instructions, safety standards and guidelines.

Employees should notify their supervisor if any equipment, machines, or tools appear to be damaged, defective, or in need of repair. Prompt reporting of loss, damage, defects, and the need for repairs could prevent deterioration of equipment and possible injury to employees or others. The supervisor can answer any questions about an employee's responsibility for maintenance and care of equipment used on the job.

Employees also are prohibited from any unauthorized use of the Agency's intellectual property, such as audio and video tapes, print materials and software.

Improper, careless, negligent, destructive, or unsafe use or operation of equipment can result in discipline, up to and including discharge.

Further, the Agency is not responsible for any damage to employees' personal belongings unless the employee's supervisor provides advance approval for the employee to bring the personal property to work.

## **Time Off and Leave of Absence**

### **Paid Holidays**

Full-time employees will be paid for the following holidays:

- New Year's Day
- Martin Luther King, Jr. Day
- Memorial Day
- Juneteenth National Independence Day
- Independence Day
- Labor Day
- Veteran's day

- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day

Any additional holidays will be designated by the Agency at the start of each calendar year.

When holidays fall or are celebrated on a regular workday, eligible employees will receive one (1) day's pay at their regular straight-time rate. Eligible employees who are called in to work on a holiday will receive one (1) day's pay at their regular straight-time rate, and an additional payment of straight-time for the actual time they work that day.

If a holiday falls within an eligible employee's approved vacation period, the eligible employee will be paid for the holiday (at the regular straight-time rate) in addition to the vacation day, or the eligible employee will receive an additional vacation day at the option of the Agency.

If a holiday falls within a jury duty or bereavement leave, the eligible employee will be paid for the holiday (at the regular straight-time rate) in addition to the leave day, or the eligible employee will receive an additional day off at the option of the Agency.

If one of these holidays falls on a Sunday, it will be observed on the following Monday. If the holiday falls on a Saturday, the Agency will select the preceding Friday as a substitute holiday.

**Holiday Pay Eligibility.** Full-time regular employees are eligible for holiday pay. Hourly non-exempt employees become eligible after they have been actively employed with the Agency for 3 months. Exempt salaried employees may receive holiday pay immediately upon joining the Agency. Part-time and temporary employees, including summer employees, are not eligible for holiday pay.

Holiday pay shall be at the employee's regular straight-time rate, inclusive of shift premiums, times the employee's regularly scheduled hours (not to exceed 8 hours).

To receive holiday pay, an eligible non-exempt employee must be at work or taking an approved absence on the workdays immediately preceding and immediately following the day on which the holiday is observed. An approved absence is a day of vacation, personal time, or a sick day. If an employee is absent on one or both days because of an illness or injury, the Agency will require medical verification of the reason for the absence before approving holiday pay. **Religious observances.** Employees who need time off to observe religious practices or holidays not already scheduled by the Agency should speak with their supervisor. The employee may be able to use available time off or unpaid time. Depending upon business needs, the employee may be able to work on a day that is normally observed as a holiday and then take time off for another religious day. The Agency seeks to reasonably accommodate individuals' religious observances.

## Vacation

Hispanic Unity of Florida recognizes the importance of time off from work to relax, spend time with family, and enjoy leisure activities. The Agency provides paid vacation time to full-time employees for this purpose, and employees are encouraged to take vacation during the year. Part-time employees regularly scheduled to work 20 or more hours per week will be eligible for paid vacation on a pro rata schedule.

Employees will accrue vacation days based on the number of years with the Agency. Please see the chart below. A new allotment of vacation time will be available for an employee to use on their anniversary date. Vacation will be accrued by pay period. All new employees will be able to use their accrued time in the first year after they have reached their 90-day probationary period.

Years of Service	Vacation Days
0-1	11
2	12
3	13
4	14
5	15
6-10	16
11-15	21
15-20	22

Employees may not take paid vacation until they have earned or accrued the vacation time. New employees accrue paid vacation at the start of employment but may not take any vacation time until they have completed at least three (3) months of employment. New employees who are hired from October through December 31 may use their accrued PTO to cover days off during the Holiday Break.

Generally, employees should submit vacation plans to their supervisor at least two (2) weeks in advance of the requested vacation date. Vacation may be scheduled up to a maximum of two (2) weeks increments. Any leave requested beyond two weeks will be approved on a case-by-case basis by HR. Managers have the right to designate when some or all the vacation days must be taken.

Every effort will be made to grant the employee's vacation preference, consistent with our operating schedule. However, if too many people request the same period off, the Agency reserves the right to choose who may take vacation time during that period. Employees with the longest length of service generally will be given preference. Vacation time may be used in full hour increments. Vacation time should be used in the year it is earned. Vacation time does not carry over. Voluntary resignation for employees who have been with the Agency for 3 years or more may receive pay for accrued and unused vacation. Employees whose employment terminates involuntarily

will not be paid for unused vacation time that has accrued during the calendar year of the termination.

If you are unable to work because of a serious medical condition, you may be eligible for a Leave of Absence. If you are unable to work because of a work-related injury, you may be eligible for workers' compensation benefits. Please reach out to the Human Resources department for more information.

Vacation days cannot be used to extend your employment with the Agency or to cover an unapproved late arrival. If you schedule or take time off and then resign with or without notice, your resignation is effective on your last day of work.

## Personal Time

Along with vacation days, the Agency also provides employees with the opportunity to take time off for personal reasons that are not related to a vacation. This time can be used at the employee's discretion for doctor visits, car maintenance, or simply a mental health day. HUF expects their employees to let their manager or supervisor know at least 48 hours in advance when personal time will be taken off. Please see the chart below showing the amount of personal time given to each full-time employee. The chart below demonstrates personal time given to employees in their first year of employment. After the first year of employment all full-time employees receive their 7 days of personal time in January. For employees who are hired from October to December, they will be given an allotment of Personal time off as stated in the chart, however, **the new employee may only use these personal days to cover absences during the Holiday break.** Personal time cannot be carried over from year to year and will not be paid out at the end of employment.

Hired during month of "current year"	Personal Time
January - March	7 days
April - June	5 days
July - September	3 days
October	2 days
November	1 day
December	0 days

## Sick Days

HUF acknowledges that wellness plays an important part in the employee experience. Therefore, full-time employees are eligible to receive up to five (5) paid sick days each year. If an employee is out of work due to illness, they must call in and notify their supervisor as early as possible, but at least by the start of the workday.

Employees will have access to their sick days as of January in any calendar year. Sick days may not be used until after the first 90 days of employment. We realize that there may be situations that may come up in the first 90 days of employment, therefore HUF will allow up to three (3) unpaid time off days while waiting for the vacation, personal



time, and Sick Days benefit to be effective. This should be used for emergency situations and discussed and approved with your supervisor.

Employees unable to report to work due to illness or injury should notify their direct supervisor before the scheduled start of their workday if possible. The direct supervisor must also be contacted on each additional day of absence. Certification by your health care provider will be required for absences of three or more consecutive workdays or for intermittent absences due to the same reason. A health care provider's certification is also required prior to reinstatement after one of those absences. A health care provider's certification may also be required in other circumstances. It is your responsibility to apply for any disability benefits for which you may be eligible because of illness or disability, including workers' compensation insurance and/or any short-term disability insurance benefits for which you qualify.

Employees may carry sick days over from one year to the next. The maximum allowed for full-time employees is up to thirty (30) days. This is not an earned benefit which means, when you separate from the Agency, unused sick time is forfeited.

The carryover of sick days is another great benefit provided by HUF. The carryover of the sick days will remain in a separate time off category and may be used only for situations that arise from a medical condition. The medical condition may be for you and any qualified FMLA leave. All employees requesting to use the carryover sick time pay must first receive approval of FMLA leave.

If the need for sick leave is foreseeable, employees are required to give at least fourteen (14) days' advance notice (e.g., planned medical treatment) whenever possible. If you are unable to work because of a serious medical condition, you may be eligible for a Leave of Absence. If you are unable to work because of a work-related injury, you may be eligible for workers' compensation benefits. Please reach out to the HR department for more information.

If the need for sick leave is not foreseeable, employees are asked to notify their supervisor as soon as is practical.

Employees will not accrue sick leave during unpaid leaves of absence. Sick days must be used in at least half-day increments. Except as required by state law, unused sick days are forfeited when an employee's employment ends for any reason.

Hired "month" as Full Time Employee	Sick Days Available
January - March	5 days
April - June	4 days
July - September	3 days
October	2 days
November	1 days
December	0 days

## **Holiday Break**

As an additional benefit to all HUF employees, the Agency typically will close for the Holiday period between Christmas and New Year's Day. The specific dates will vary from year to year. The Agency reserves the right to not close for this period. All employees will be notified if the Agency will be closing for the holidays during the 3<sup>rd</sup> quarter of the previous year. When the Agency announces official closing dates, it will also let you know what dates count as Holiday pay and what days need to be used as vacation or personal days to cover the time off. For new employees that are hired after July 1<sup>st</sup>, we recommend you use your vacation or personal days during this time. If any employee does not have time off, the time will be unpaid.

## **Personal Leave**

To recognize the need of employees who require time off in addition to other types of leave, HUF may consider an unpaid personal leave of absence without pay for up to a maximum of thirty (30) days.

All regular employees employed by HUF for at least one year are eligible to apply for an unpaid personal leave of absence. Job performance, absenteeism, and departmental requirements will be considered before a request is approved. Approval by the immediate supervisor, department director and HR is required. Requests for unpaid personal leave may be denied or granted by the Agency for any reason or no reason and are within the sole discretion of the Agency. You may be required to use accrued vacation and personal days concurrently with an unpaid leave of absence. Sick leave benefits may be used during occupational medical leaves and pregnancy disability leaves. Any vacation or personal days or sick leave payments will be coordinated with any state disability, workers' compensation, or other wage reimbursement benefits for which you may be eligible, so that at no time will you be paid more than your regular compensation.

HUF reserves the right to terminate employment for any reason or no reason during the leave of absence.

If the request is approved, the supervisor will submit a (Personnel Action Form (PAF) to the Finance Department as soon as practicable. Once the employee returns, the supervisor should complete a PAF returning the employee to active status and submit it to the Finance Department. The Payroll Specialist is responsible for ensuring that no employee on an approved personal leave of absence is left unpaid.

An employee must return from unpaid personal leave on the originally scheduled return date. If the employee is unable to return, they must request an extension of the leave in writing. If HUF declines to extend the leave, the employee must then return to work on the originally scheduled return date or be considered to have voluntarily resigned from his or her employment. Extensions of leave will be considered on a case-by-case basis at the discretion of President and CEO and/or designee.

Employees are hereby notified that the Agency does not guarantee reinstatement following a personal leave of absence. However, the Agency will offer employees

returning from a leave of absence the same position, or a comparable position that the individual is qualified to perform, if either position is available.

## **Family and Medical Leave**

HUF complies with the Family and Medical Leave Act (FMLA), which requires employers to grant unpaid leaves of absence to qualified workers for certain medical and family-related reasons. The Agency also abides by any state and local leave laws. The more generous of the laws will apply to the employee if the employee is eligible under both federal and state laws.

Please note there are many requirements, qualifications, and exceptions under these laws, and each employee's situation is different. Contact the HR department to discuss options for leave.

**Basic leave entitlement.** The FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons: (1) for incapacity due to pregnancy, prenatal medical care, or childbirth; (2) to care for the employee's child after birth or placement for adoption or foster care; (3) to care for the employee's spouse, child, or parent who has a serious health condition; or (4) for a serious health condition that makes the employee unable to work.

**Military family leave entitlements.** Eligible employees with a spouse, child, or parent on active duty or called to active-duty status in the National Guard or Reserves in support of a contingency operation may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include addressing issues that arise from (1) short notice of deployment (limited to up to 7 days of leave); (2) attending certain military events and related activity; (3) arranging child care and school activities; (4) addressing certain financial and legal arrangements; (5) attending certain counseling sessions; (6) spending time with covered military family members on short-term temporary rest and recuperation leave (limited to up to 5 days of leave); (7) attending post deployment reintegration briefings; (8) arranging care for or providing care to a parent who is incapable of self-care; and (9) any additional activities agreed upon by the employer and employee that arise out of the military member's active duty or call to active duty.

The FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered servicemember during a single 12-month period. A covered servicemember is a current member of the armed forces, including a member of the National Guard or reserves, who has a serious injury or illness incurred in the line of duty on active duty that may render the servicemember medically unfit to perform the duties of the servicemember's office, grade, rank, or rating and for which the servicemember is undergoing medical treatment, recuperation, or therapy; is in outpatient status; or is on the temporary disability retired list.

**Benefits and protections during FMLA leave.** During FMLA leave, the Agency will maintain the employee's health coverage under any "group health plan" on the same terms as if the employee had continued to work. Upon return from FMLA leave, most employees will be restored to their original or equivalent positions with equivalent pay, benefits, and other employment terms. However, an employee on FMLA leave does not have any greater right to reinstatement or to other benefits and conditions of employment than if the employee had been continuously employed during the FMLA leave period.

Certain highly compensated key employees also may be denied reinstatement when necessary to prevent "substantial and grievous economic injury" to the Agency's operations. A "key" employee is an eligible salaried employee who is among the highest-paid 10 percent of the Agency's employees within 75 miles of the worksite. Employees will be notified of their status as key employees, when applicable, after they request FMLA leave.

Use of FMLA leave cannot result in the loss of any employment benefit that accrued before the start of an employee's leave.

**Employee eligibility.** The FMLA defines eligible employees as employees who (1) have worked for the Agency for at least 12 months; (2) have worked for the Agency at least 1,250 hours in the previous 12 months; and (3) work at or report to a worksite that has 50 or more employees or is within 75 miles of agency worksites that, taken together, have a total of 50 or more employees.

**Definition of "serious health condition."** A serious health condition is an illness, an injury, an impairment, or a physical or mental condition that involves either an overnight stay in a medical care facility or continuing treatment by a healthcare provider for a condition that either prevents the employee from performing the functions of the employee's job or prevents the qualified family member from participating in school, work, or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least 2 visits to a healthcare provider or 1 visit and a regimen of continuing treatment, incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of "continuing treatment."

**Use of leave.** An employee does not need to use this leave entitlement in one block. Leave can be taken intermittently or on a reduced work schedule when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the employer's operations. Leave due to qualifying exigencies also may be taken on an intermittent or a reduced work schedule basis.

**Substitution of paid leave for unpaid leave.** Employees may choose or employers may require the use of accrued paid leave while taking FMLA leave. Accordingly, the Agency

requires employees to use any accrued vacation, personal days, and sick days during an unpaid FMLA leave taken because of the employees' own serious health condition or the serious health condition of a family member or to care for a seriously ill or injured family member in the military. In addition, employees must use any accrued vacation, personal days, and sick days during FMLA leave taken to care for a newborn or newly placed child or for a qualifying exigency arising out of a family member's active duty or call to active-duty status in support of a contingency operation. To use paid leave for FMLA leave, employees must comply with the Agency's normal paid leave procedures found in its Vacation and Personal Days and Sick Leave policies.

**Employee responsibilities.** Employees must provide 30 days' advance notice of the need to take FMLA leave for HR when the need is foreseeable. When 30 days' notice is not possible, employees must provide notice to HR as soon as practical. The Agency may delay leave to employees who do not provide proper advance notice or appropriate medical documentation of the foreseeable need for leave, absent unusual circumstances preventing the notice.

Employees must provide sufficient information as required by HR for the Agency to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a healthcare provider, or circumstances supporting the need for military family leave. Employees also must inform the Agency of the requested leave is for a reason for which FMLA leave was previously taken or certified. Employees are also required to provide a certification and periodic recertification supporting the need for leave. The agency also may require a second and, if necessary, a third opinion (at the Agency's expense) when the leave is a result of the employee's own serious health condition, a fitness-for-duty report to return to work. The Agency also may delay or deny approval of leave for lack of proper medical certification.

### **Cooperate in the Scheduling of Planned Medical Treatment (Including Accepting Transfers to Alternative Positions) and Intermittent Leave or Reduced Leave Schedules**

When planning medical treatment, employees must consult with the Agency and make a reasonable effort to schedule treatment so as not to unduly disrupt the Agency's operations, subject to the approval of an employee's health care provider. Employees must consult with the agency prior to the scheduling of treatment to work out a treatment schedule that best suits the needs of both the Agency and the employees, subject to the approval of an employee's health care provider. If employees providing notice of the need to take FMLA leave on an intermittent basis for planned medical treatment neglect to fulfill this obligation, the Agency may require employees to attempt to make such arrangements, subject to the approval of the employee's health care provider.

When employees take intermittent or reduced work schedule leave for foreseeable planned medical treatment for the employee or a family member, including during a period of recovery from a serious health condition or to care for a covered servicemember, the Agency may temporarily transfer employees, during the period that the intermittent or reduced leave schedules are required, to alternative positions with equivalent pay and benefits for which the employees are qualified and which better accommodate recurring periods of leave.

When employees seek intermittent leave or a reduced leave schedule for reasons unrelated to the planning of medical treatment, upon request, employees must advise the Agency of the reason why such leave is medically necessary. In such instances, the agency and employee shall attempt to work out a leave schedule that meets the employee's needs without unduly disrupting the Agency's operations, subject to the approval of the employee's health care provider.

**Agency responsibilities.** The Agency will inform employees requesting leave whether they are eligible under the FMLA. If they are, the notice will specify any additional information required, as well as the employees' rights and responsibilities. If employees are not eligible, the Agency will provide a reason for the ineligibility.

The Agency will inform employees if leave will be designated as FMLA-protected and the amount of leave counted against the employees' FMLA leave entitlement. If the Agency determines that the leave is not FMLA-protected, the agency will Agency the employees.

Employees may not perform work for self-employment or for any other employer during an approved leave of absence, except when the leave is for military or public service or when the Agency has approved the employment under its Outside Employment policy and the employees' reason for FMLA leave does not preclude the outside employment.

**Unlawful acts by employers.** The FMLA makes it unlawful for any employer (1) to interfere with, restrain, or deny the exercise of any right provided under the FMLA or (2) to discharge or discriminate against any person for opposing any practice made unlawful by the FMLA or for involvement in any proceeding under or relating to the FMLA.

The FMLA does not affect any federal or state law prohibiting discrimination or supersede any state or local law or collective bargaining agreement that provides greater family or medical leave rights.

## **Military Leave**

HUF supports the military obligations of all employees and grants leaves for uniformed service in accordance with applicable federal and state laws. Any employee who needs time off for uniformed service should immediately notify the HR department and the employee's supervisor, who will provide details regarding the leave. If an employee is

unable to provide notice before leaving for uniformed service, a family member should notify the supervisor as soon as possible.

Upon return from military leave, employees will retain certain rights with respect to reinstatement, seniority, layoffs, compensation, length of service promotions, and length of service pay increases, as required by applicable federal or state law. Failure to report for work within the prescribed time after completion of military service will be considered a voluntary termination.

All employees who enter military service may accumulate a total absence of 5 years and still retain employment rights.

### **Domestic or Sexual Violence Leave**

An employee is eligible for domestic or sexual leave on the first day of employment. An employee who is a victim of domestic violence or sexual violence or has a family or household member who is a victim of domestic violence or sexual violence may, at the Agency's discretion, take up to three (3) days of unpaid leave time within a 12-month period. Employees must exhaust any available time off. Family or household members includes spouses, former spouses, persons related by blood or marriage, persons who are presently residing together as if a family or who have resided together in the past as if a family, and persons who are parents of a child in common regardless of whether they have been married.

#### **Domestic or Sexual Violence Leave May Be Used To:**

- Seek an injunction for protection against domestic violence or repeat violence, dating violence, or sexual violence.
- Obtain medical care and/or mental health counseling for the Employee or a family or household member to address physical or psychological injuries resulting from domestic violence or sexual violence.
- Obtain services from victim's services organizations including, but not limited to, a domestic violence shelter or program or a rape crisis center because of the act of domestic violence or sexual violence.
- Make the employee's home secure from the perpetrator of domestic violence or seek new housing to escape the perpetrator; and/or
- Seek legal assistance to address issues arising from domestic violence or sexual violence, or to attend or prepare for a related court proceeding.

The Domestic Violence Leave will be concurrent with FMLA, when applicable. Before an employee is entitled to take any Domestic Violence Leave, the employee must exhaust all available time off. If the employee has no time off available, any Domestic Violence Leave taken will be unpaid.

Except in cases of imminent danger to your health and safety or that of a family member, you must provide the Agency with advance notice when possible. The Agency may require you to provide certification of the purpose of the leave in the form of a letter from a volunteer services organization, an attorney, police report or court record, or other

corroborating evidence. The Agency will keep all information pertaining to this leave confidential to the extent required by law.

### **Bereavement Leave**

Employees with more than 3 months' service may take up to 3 days of paid bereavement leave upon the death of a member of their immediate family. "Immediate family members" are defined as an employee's spouse, domestic partner, parents, stepparents, siblings, children, stepchildren, grandparents, parent-in-law, brother-in-law, sister-in-law, son-in-law, daughter-in-law, or grandchild. All regular, full-time employees may take up to 1 day off with pay to attend the funeral of an extended family member (aunts, uncles, and cousins).

The Agency may require verification of the need for the leave. The employee's supervisor and HR will consider this time off on a case-by-case basis.

Payment for bereavement leave is computed at the regular hourly rate to a maximum of 8 hours for 1 day. Time off granted in accordance with this policy shall not be credited as time worked for the purpose of computing overtime.

### **Jury Duty/Court Appearance**

HUF realizes that it is the obligation of all U.S. citizens to serve on a jury when summoned to do so. All employees will be allowed time off to perform such civic service as required by law. Employees are expected, however, to provide proper notice of a request to perform jury duty and verification of their service.

Employees also are expected to keep management informed of the expected length of jury duty service and to report to work for the major portion of the day if excused by the court. If the required absence presents a serious conflict for management, employees may be asked to try to postpone jury duty.

Employees on jury duty leave will be paid for their jury duty service in accordance with state law; however, exempt employees will be paid their full salary for any week in which time is missed due to jury duty if work is performed for the Agency during such week.

Non-exempt employees will receive full pay while serving up to three days of jury duty. In addition, exempt employees will receive full pay while serving up to one entire week of absence due to jury duty. Any additional time off for this purpose will be without pay. Any payments for jury duty, such as mileage allowances, per diems, or other fees, will be credited against any payments made by the Agency. You will be required to provide verification from the court clerk confirming your service as a juror and you will be expected



to report or return to work for the remainder of your work schedule on any day you are dismissed from jury duty.

## **Time Off for Voting**

HUF recognizes that voting is a right and privilege of being a citizen of the United States and encourages employees to exercise their right to vote. In almost all cases, you will have sufficient time outside working hours to vote. If employees are unable to vote in an election during their nonworking hours, the Agency will grant up to one (1) hour of paid time off to vote. This time should be taken at the beginning or end of the regular work schedule. Where possible, your supervisor should be notified at least two days prior to the voting day.

## **Training Programs and Seminars**

During employment at HUF, employees may be required, or may request to attend a training seminar, conference, etc. When attendance at one of these functions is required by the Agency, the employee will be reimbursed for the reasonable expenses incurred for attending the function and will be compensated based on your exemption status. An employee must obtain supervisor's written approval prior to attending one of these functions.

You must also estimate your expenses for attending the function and submit them to your supervisor for approval. You will not be reimbursed for expenses without prior written approval from your supervisor. Please note that Employees' voluntary attendance at seminars or other educational forums is not subject to this policy. You will not be compensated for time spent in voluntary attendance in seminars and other programs conducted outside of normal business hours or not directly related to your current position.

## **Employee Benefits**

### **Benefits Overview**

In addition to good working conditions and competitive pay, it is HUF's policy to provide a combination of supplemental benefits to all eligible employees. In keeping with this goal, each benefit program has been carefully devised. These benefits include time-off benefits, insurance, and other plan benefits. We are constantly studying and evaluating our benefits programs and policies to better meet present and future requirements. These policies have been developed over the years and continue to be refined to keep up with changing times and needs.

The provisions of the plans, including eligibility and benefits provisions, are summarized in the summary plan descriptions ("SPDs") for the plans (which may be revised from time to time). In the determination of benefits and all other matters under each plan, the terms of the official plan documents shall govern over the language of any descriptions of the plans, including the SPDs and this handbook. HUF (including the officers and

administrators who are responsible for administering the plans) retains full discretionary authority to interpret the terms of the plans, as well as full discretionary authority regarding administrative matters arising in connection with the plans and all issues concerning benefit terms, eligibility, and entitlement.

While the Agency intends to maintain these employee benefits, it reserves the absolute right to modify, amend or terminate these benefits at any time and for any reason.

If employees have any questions regarding benefits, they should contact HR/CFO.

### **Medical, Dental, and Vision Insurance**

Full-time employees working 30 hours or more per week are eligible for insurance on the first of the month following 90 days of service. To keep coverage in force, every insured employee must work a minimum of 30 hours per week.

Full-time employees may participate in the Agency's insurance programs. Under these plans, eligible employees will receive comprehensive health and other insurance coverage for themselves and their families, as well as other benefits.

Upon becoming eligible to participate in these plans, employees will receive summary plan descriptions (SPDs) describing the benefits in greater detail. Please refer to the SPDs for detailed plan information. Of course, feel free to speak to HR if you have any further questions.

### **Employee Contributions**

The Agency's benefit package is contributory; that is, the employee is responsible for a portion of the premium for your benefits. A portion of the premium, up to a maximum per month, is contributed by the Agency. Employee's contributory cost is deducted from your pay.

### **Late Applicants**

At the time an employee is hired, they are given an opportunity to elect certain benefits. If an employee waives participation in any of these programs for either themselves or their eligible dependents, the employee will generally be allowed to apply for entry into the various plans only during Open Enrollment.

### **Open Enrollment**

The Open Enrollment period allows employees to add or change their benefits coverage. Open Enrollment takes place annually. Applications for [medical, dental, short-term disability (STD), long-term disability (LTD), life insurance and supplemental life insurance may be submitted during this period. Changes, additions, and other changes made during Open Enrollment will take effect on the effective date following the Open Enrollment period. Once an employee has made a change, employees generally cannot change that selection until the next Open Enrollment period (except in the case of certain life events).

### **Enrollment for Qualifying Events**

Enrollment for qualifying events allows individuals who previously declined coverage to enroll in the plan upon loss of eligibility for other coverage and upon certain life events, such as marriage and the birth, adoption, or placement for adoption of a child. Employees must generally request enrollment within 30 days of the loss of coverage or life event triggering this enrollment. For specific details regarding qualifying events, please refer to your Summary Plan Description.

### **Continuation of Health Coverage**

Federal law generally requires covered employers to give employees, spouses (including same-sex spouses) and dependent children the right to continue group health benefits for limited periods of time under certain circumstances, such as voluntary or some types of involuntary job loss, reduction in hours worked, death, divorce, and other life events. Employees ordinarily may continue their health coverage for up to 18 months when their employment is terminated.

### **Group Life Insurance**

HUF provides life insurance for full-time employees who work a minimum of 30 hours per week. Employees are eligible for this benefit on the first of the month following 90 days of service. The cost of this coverage is paid for in full by the Agency. Please refer to the Summary Plan Description (SPD).

### **Supplemental Life Insurance**

Full-time employees are eligible to purchase supplemental life insurance for themselves at group rates. Supplemental life insurance is a voluntary benefit and is employee specific. Enrollees should refer to the plan SPD for eligibility requirements, plan limitations and additional information.

### **Short-Term Disability**

Short-term disability is offered to full-time employees working a minimum of 30 hours per week. Employees are eligible for this benefit on the first of the month following 90 days of service. Short-term disability is meant to bridge the 90-day period until long-term disability can cover an employee. If an employee becomes disabled and cannot work for a short period of time, this coverage pays 60 percent of the employee's salary, up to the policy limits. **This is a voluntary benefit and is funded solely by the employee.** In addition, employees will not be paid vacation, personal days, or sick leave for approved absences covered by the Agency's program, except to supplement the short-term disability benefits.

Short-term disability benefits may run concurrently with FMLA leave and/or any other leave where permitted by state and federal law.

### **Long-Term Disability**

Long-term disability benefits are offered to full-time employees working a minimum of 30 hours per week. If an employee becomes totally disabled and cannot work for an extended period, this coverage pays 60 percent of the employee's salary, up to the policy limits. **This is a voluntary benefit and is funded solely by the employee.**

Long-term disability benefits will run concurrently with FMLA leave and/or any other leave where permitted by state and federal law.

### **401(k) Plan**

HUF recognizes the importance of saving for retirement and offers eligible employees a 401(k) plan.

Eligibility, vesting, and all other matters relating to these plans are explained in the SPD that can be obtained from HR.

### **Workers' Compensation**

Workers' compensation is a "no-fault" system that provides compensation for medical expenses and wage losses to employees who are injured or who become ill because of employment. HUF pays the entire cost of workers' compensation insurance. The insurance provides coverage for related medical and rehabilitation expenses and a portion of lost wages to employees who sustain an injury on the job.

The Agency abides by all applicable state workers' compensation laws and regulations. If an employee sustains a job-related injury or illness, it is important to notify the supervisor and HR immediately. The supervisor will complete an injury report with input from the employee and return the form to the HR department. HR will file the claim with the insurance Agency. In cases of true medical emergencies, report to the nearest emergency room.

To receive workers' compensation benefits, you must:

- a. Report any work-related injury to your supervisor immediately.
- b. Complete a written claim form and return it to the Supervisor.
- c. Seek medical treatment and follow-up care if required.

State law imposes legal consequences on the abuse of workers' compensation benefits. The Agency will report any concerns of false or fraudulent claims to the workers' compensation insurance carrier for investigation.

Any person who makes or causes to be made any material statement or representation, known to be false or fraudulent, for the purpose of obtaining or denying workers' compensation benefits or payments is guilty of a crime and subject to criminal and civil penalties.

Workers' compensation benefits (paid or unpaid) will run concurrently with FMLA leave, if applicable, where permitted by state and federal law. In addition, employees will not be paid vacation or sick leave for approved absences covered by the Agency's workers' compensation program, except to supplement the workers' compensation benefits such as when the plan only covers a portion of the employees' salary as allowed by state law.

Employees may be required to submit to a drug and alcohol test, post-accident or after first report of injury, at a location specified by the Agency or the workers' compensation insurance carrier's specified location. Determination to conduct a post incident drug and alcohol test will be made per the Agency's Drug and Alcohol-Free Workplace Policy. Workers' compensation benefits may be denied if an employee fails to submit to a drug and alcohol test after reasonable suspicion has been determined or if a positive test is confirmed.

Neither the Agency nor the insurance carrier will be liable for the payment of workers' compensation benefits for injuries that occur during an employee's voluntary participation in any off-duty recreational, social, or athletic activity sponsored by the Agency, or which are not part of the employee's work-related duties.

The Agency strictly prohibits retaliation against any employee for making a valid claim for workers' compensation benefits.

### **Employee Assistance Program**

The employee assistance program (EAP) is a resource designed to provide highly confidential and experienced help for employees in dealing with issues that affect their lives and the quality of their job performance. HUF wants employees to be able to maintain a healthy balance of work and family that allows them to enjoy life. The EAP is a confidential counseling and referral service that can help employees successfully deal with life's challenges.

The Agency encourages employees to use this valuable service whenever they have such a need. Employees who choose to use these counseling services are assured the information disclosed in their sessions is confidential and not available to the Agency and the Agency is not given any information on who chooses to use the services. For questions or additional information about this program, employees may contact the HR department.

## EMPLOYEE HANDBOOK ACKNOWLEDGMENT AND RECEIPT

I hereby acknowledge receipt of the employee handbook of HUF. I understand and agree that it is my responsibility to read and comply with the policies in the handbook.

I understand that the handbook and all other written and oral materials provided to me are intended for informational purposes only. The handbook, Agency practices, and other communications do not create an employment contract or term. I understand that the policies and benefits, both in the handbook and those communicated to me in any other fashion, are subject to interpretation, review, removal, and change by management at any time without notice.

I further understand that I am an at-will employee and that neither this document nor any other communication shall bind the Agency from employing me now or hereafter and that my employment may be terminated by me or the Agency without a reason at any time. I understand that no representative of the Agency has any authority to enter into any agreement for employment for any specified period or to assure any other personnel action or to assure any benefits or terms or conditions of employment or make any agreement contrary to the foregoing.

I also understand and agree that this agreement may not be modified orally and that only the President & CEO of the Agency or designated Agency representative may make a commitment for employment. I also understand that if such an agreement is made, it must be in writing and signed by the President & CEO or designated Agency representative.

---

Employee's Name in Print

---

Signature of Employee

---

Date Signed by Employee

**TO BE PLACED IN EMPLOYEE'S PERSONNEL FILE**

# Hispanic Unity of Florida 2024 **DRAFT** Policy Priorities & Recommendations



Empowering a  
New Generation  
of Americans

## Health

**All individuals have access to affordable, high quality, culturally, and linguistically appropriate care in a timely manner**

Hispanic Unity of Florida's (HUF) Health and Well-Being is a program designed to nurture physical, mental, and emotional health, promoting a thriving community that embodies vitality and resilience. From healthcare access and mental health support to wellness education and preventive programs, our offerings aim to empower individuals to lead healthy and fulfilling lives.

### Recommendations

- Support Culturally Appropriate Mental Health Counseling.
- Support the elimination of the five-year residency in Florida rule for Legal Permanent Residents to access Medicaid.
- Support access to affordable healthcare, as per the Affordable Care Act, to low-income adults under 138% of the Federal Poverty Line.

## Economic Development

**Strong, equitable, inclusive economies deliver broad-based prosperity to their residents.**

HUF assists clients through its Center for Working Families (CWF) program that uses a two-generation (2Gen) approach that builds family well-being and a legacy of educational and economic prosperity by intentionally and simultaneously working with children and the adults in their lives together.

### Recommendations

- Support Workforce Development: Support workforce, apprenticeship, skill building programs and family-sustaining employment opportunities that support low-income families in developing necessary skills to attain high-wage jobs.
- Support Affordable Housing: The significant growth of severely cost-burdened renters is most pressing problem due to three market conditions:
  1. The increasing demand for renter housing resulting in low vacancy rates and a spiraling increase in rent prices.
  2. The lack of affordable rental housing production.
  3. Rent prices are increasing faster than wages.

## Education **DRAFT**

**Each child receives what they need to develop to their full academic and social potential.**

### Recommendations

- Prioritize early childhood education. The Office of Early Learning (OEL) must engage with early learning stakeholders across the state to determine the plan they will submit to the Legislature and the Administration for Children and Families for use of these funds.
- Support boosting funding for both School Readiness and the Voluntary Pre-K program to better serve more families and buoy childcare operators.



## About HUF

Hispanic Unity of Florida (HUF) was founded in 1982 by community leaders to guide newcomers to the U.S. on their journey to their American dream. With 12 programs and 30+ services offered in up to four languages, HUF serves Florida's diverse community. Since its inception, HUF has helped more than 520,000 individuals.



**DRAFT**

## Mission

Empowering immigrants and others to become self-sufficient, productive, and civically engaged.

# Our 2022 Impact



## Center For Working Families

The Center for Working Families (CWF) Department aids low to middle-income families in achieving financial stability. Key to this approach is the coordination of three core service strands at a single, convenient location. HUF offers income support application assistance, workforce education, job placement, and money management sessions, along with strategies for building generational wealth, access to healthcare, and related support services to advance the wellbeing of individuals and families.



## Education

HUF is committed to creating a positive learning environment that promotes its values, such as compassion, respect, dignity, collaboration, and cultural awareness with the help of the Education Department HUF's education programs empower families, promote healthy behaviors and lead to a pathway of success. Our 2Gen approach provides resources that support academic, well-being, emotional and economic mobility for both students and their families.



## Civic Engagement

The Civic Engagement Department promotes self-sufficiency through civic participation, encourages voting involvement, and strengthens community capacity. It guides residents in learning about their new country, advocating for their needs, and pursuing citizenship. The Department offers diverse immigration services, now with official recognition and accreditation from the Department of Justice and Department of Homeland Security.



**For more information, please contact:**

**Felipe Pinzon** President/CEO

954.257.5473 • [fpinzon@hispanicunity.org](mailto:fpinzon@hispanicunity.org)

[www.hispanicunity.org](http://www.hispanicunity.org)



**Board of Directors**  
Meeting Minutes  
Tuesday, October 10, 2023 | 4:00 PM – Zoom Meeting

**Call to Order / Roll Call**

**Christina Paradowski and Felina Furer**

Began at 4:00pm

**Chair Welcome**

**Christina Paradowski**

During these challenging times of conflict in Israel, Christina conveyed her love and support to the Jewish Community.

Additionally, heartfelt birthday wishes were extended to Giselle Cushing, celebrating her birthday on October 20th.

Board Chair also remind everyone to complete their board assessment, link <https://forms.gle/oAsDsh3b3sdcMZRK9>

**CEO Report**

**Felipe Pinzon**

During Hispanic Heritage Month, HUF organized an award ceremony to honor Broward County Administrator, Monica Cepero, marking her as the first Latina to hold this position. Monica also engaged with our Unity4Kids by reading to them, followed by an intimate celebration in the HUF conference room.

In other updates, Felipe shared details of his out-of-town CEO meetings, including discussions in Tallahassee regarding an appropriation request for 2024. Additionally, he will be participating in Leadership Florida in River Ranch, FL, and is scheduled to attend an invite-only Kresge Foundation retreat in Memphis in early November.

Noteworthy achievements within the HUF team include Juliana Esguerra's completion and graduation from a NALCAB Leadership Cohort. Elizabeth Dorante is actively participating in two nationwide cohorts, and Otto Valenzuela has commenced the 2023-2024 Leadership Broward program, representing Hispanic Unity.

**Finance**

**Leonor Romero**

In the latest IRS 990 update, Leonor informed that there are a few pending review questions, which are set to be finalized with the Auditor on the 12th. Subsequently, the

Finance committee is scheduled to review and vote on it on the 19th. As an extension has been filed, the plan is for the board to vote on the 990 via email on the 24th. Furthermore, it's anticipated that in early November, the finalized 990 will be distributed to stakeholders.

**Strategic Plan Update**

**Christina Paradowski &  
Felipe Pinzon**

On October 25th, VeraCruz is slated to present the final draft of the strategic plan to the Strategic Plan Committee. The document is expected to be approximately 15 pages in length plus appendixes, complemented by a 2-page executive summary. Concurrently, staff members are actively engaged in defining priorities and formulating an implementation plan, with the goal of having a draft ready by the third week of November.

**Governance**

**Tony Abbate**

In response to Dan Schevis' resignation, a heartfelt appreciation was expressed for his dedicated service to HUF during two terms, with sincere recognition and the acknowledgment that he will be missed.

On a positive note, Lucia Rodriguez has graciously committed to an additional year on the board, opting back in after the initial opt-out.

Two proposed bylaw revisions were introduced for consideration. Firstly, a change in the wording regarding the annual/retreat meeting in May to state "an annual meeting shall be held" instead of specifying a particular time. Secondly, a proposal to replace "may extend term of 'treasurer'" with "officer" is under consideration.

These proposed changes are slated for a vote at the upcoming board meeting, as they will impact the 2024 slate of officers.

**2024 Proposed Slate of Officers:**

Chair: Tony Abbate

Chair Elect: Maritza Alvarez

Secretary: Carolina Cardozo

Treasurer: Lisette Rodriguez

Past Chair: Christina Paradowski

A vote for the slate of officers for 2024 will be initiated during the November board meeting.

2024 Board Meetings: Shifting the retreat to September is deemed beneficial for effective preparation for the following year, as opposed to May, which allows for planning the current year. Felipe proposed a reduction in the number of meetings from 10 to 8, with considerations on the preferred time of day—options include 8 am, 9 am,

or 4 pm start time. To enhance in-person engagement, there is a proposal to move meetings to the 3rd or 4th Tuesday of the month instead of the 2nd Tuesday. A doodle poll will be circulated to gather input on preferred days and times, including the addition of 4th Thursdays. The retreat is planned for a Saturday, except for the December meeting, which is scheduled for the 1st Tuesday of the month.

Alexandra Palau underwent an interview conducted by the Governance committee. Maria Barnard, in her feedback, emphasized Alexandra's strong marketing background and highlighted her data-driven approach. Maria expressed the belief that Alexandra would be a valuable addition to the Marketing committee as well.

**Lucia Rodriguez motioned to approve the nomination to the board of directors. The second was made by Francisco Rivera. Motion passed.**

<b>Operations</b>	<b>Felipe Pinzon</b>
-------------------	----------------------

Employee Handbook: The completion of the handbook is in its final stages, with a scheduled review by the finance committee on October 19th. A concise one-pager highlighting major updates and changes will be shared. Following approval by the finance committee, the handbook will be presented to the Board for their consideration. The official vote on the handbook is slated for the November meeting. The planned rollout to the staff is scheduled for January 2024.

<b>Public Policy &amp; Advocacy</b>	<b>Felipe Pinzon &amp; Otto Valenzuela</b>
-------------------------------------	--

2024 State Appropriations Request: Senator Lauren Book has committed to continuing sponsorship of our 2024 request, and Representative Griffitts will also sponsor the appropriations request. A special thank you was extended to Representative Danny Perez, the incoming Florida House Speaker.

Otto provided an overview of the advocacy schedule from October 2023 through January 2024, which includes three visits to Tallahassee, participation in United Way and Broward Days, among other activities. Notably, the legislative session is scheduled to take place from January 9th to March 8, 2024.

<b>Fund Development</b>	<b>Shani Wilson</b>
-------------------------	---------------------

10<sup>th</sup> Annual Entrepreneur Summit: Next week on Friday, October 20<sup>th</sup> at the Alan B. Levan, NSU Broward Center of Innovation, HUF will be hosting its 10<sup>th</sup> Entrepreneur Summit. This is HUF's first in-person event since 2019 connecting more than 250 aspiring and emerging business owners to information, networking, and resources.

The event will open with a plenary session on business resources in Broward with panelists representing SCORE Broward, Prospera, the Broward County Office of Economic & Small Business Development, and Small Business Development Center at FAU. Our keynote speaker, thanks to BOD member Giselle Cushing, is Liliam Lopez, the founder and President/CEO of the South Florida Hispanic Chamber of Commerce and its foundation.

The American Dreamer Award Presentation and Discussion will be moderated by 20-year veteran journalist, Sergio Bustos. And we'll end the event with a Marketing Class focused on digital marketing.

The sponsors include Amazon, JM Family Enterprises, JP Morgan Chase, and more. And additional sponsorships are available. Board members were invited to promote the event and attend.

End of Year Fundraising Activities: In the coming weeks, Shani Wilson will provide additional details on HUF's participation in Give Miami Day, and Giving Tuesday, as well as your personalized donation pages and scripts.

<b>Consent Agenda</b>	<b>Christina Paradowski</b>
-----------------------	-----------------------------

**Dan Herz motioned to approve the consent agenda. A second was made by Maria Barnard. Motion passed.**

<b>Executive Session</b>	<b>Christina Paradowski</b>
--------------------------	-----------------------------

Discuss annual review of the CEO/President.

<b>Adjourn</b>
----------------

At 6:07pm

**Next Meeting: Tuesday, November 14<sup>th</sup> @4pm (Zoom)**



**Finance Committee**  
Meeting Minutes  
Thursday, September 21, 2023 | 9:00 AM

**Call to Order / Roll Call**

**Lisette Rodriguez and Felina Furer**

Began at 9:03am

Present: Lisette Rodriguez, Christina Paradowski, Rodney Bacher and Christian Reyes

Excused: Myrna Monserrat, Arnold Nazur and Alejandro Loscher

Absent:

**Approval of August 2023 Minutes**

**Lisette Rodriguez**

**Rodney Bacher motioned to approve the August minutes. A second was made by Christian Reyes. Motion passed.**

**Program Performance – Scorecard Review**

**Felipe Pinzon**

All other programs are in good standing and working according to projections.

In the Economic Development Department, CWF is not on track to meeting goals or revenues. This contract will end September 30<sup>th</sup> and the percentages for both goals and revenues are in the red at approximately 62% and 51% respectively.

All other programs are in good standing and working according to projections.

Lastly the Civic Engagement department where the news is excellent. All contracts are well on their way to meeting and possibly surpass projections. Staff continue collaborating with Florida Blue partners by utilizing their retail center in Hialeah; this pilot is quickly proving to be very successful; a team of three staff works from that site every Thursday offering consultation, document clarification and orientation. The Miami Dade Contract (CIRCLES) might be renewed – at a meeting with Catholic Legal Services and the partners under this contract, we were informed that Mayor Daniella Levine Cava included this program in her discretionary funding (she does not want to draw attention to this line item because of the current situation). The County Mayor is committed to re-funding the program at the same level.

The county budget needs to be approved by 9/30 and there is a meeting scheduled for today 9/21 – Hopefully, we will know more after their meeting.

We are also waiting for the anticipated award answer due on 9/30 from the Innovation grant submitted to USCIS for \$250K for the next 2 years.

**Fund Development Update****Shani Wilson**

Our budget for 2023 is just over \$8.7M. This year, we are tasked with raising nearly \$1.7M, including \$560,000 in unrestricted funds and \$1.1M in restricted or grant funding. To date, we have secured \$222,356 (or 40%) of our \$560,000 unrestricted fundraising goal. This is up about \$13,400 from last month. With respect to our \$1.1M grant revenue goal, we have secured \$898,791 (or 80%) of our goal for this year. This is up \$125,500 from last month.

As a point of reference, this time last year, we secured 53% of our unrestricted revenue (\$294,248 of \$560,000), and 112% of our grant revenue (\$1,269,853 of \$1,133,000).

There are no changes in revenue for emergency assistance, nor funds secured for 2024 and beyond. We raised an additional \$1,000 towards the Miniaci Family's Challenge. We recently met with the Community Foundation of Broward to bring them up to date on our plan for this matching grant opportunity. We are planning to recognize Beatriz and Albert Miniaci during an upcoming board meeting and will have a chance to present our case for support to other fundholders at the Community Foundation in February.

We are pending responses from 20 grant proposals totaling \$2.3M, including a \$403K request from the Children's Services Council of Broward for VITA. And we are planning to submit at least another \$402K in requests by the end of the year. In addition, our team regularly seeks and receives grant opportunities, so we fully expect this number to be higher through the last quarter.

Lastly, our in-person Entrepreneur Summit is taking place on Friday, October 20, 2023, at the Alan B. Levan | NSU Broward Center of Innovation from 8AM to 1PM. We have secured \$23,000 out of \$75,500 in sponsorships (30%); dollars raised from this event go to our unrestricted goal. Feel free to share sponsorship opportunities and promote the event among your networks.

**July 2023 Financial Statements****Leonor Romero**

Leonor shared growth highlights from 2022 to 2023, we are in a better posture than previous year. We are in a good position with our cash with a higher differential. We are receiving interest payments of about \$4K a month, which is going to the bottom line. We are fully paid with our line of credit. We are at \$89K deficit bottom line, releasing prior year payment schedules. We will have a surplus from Education units.

Employees get reimbursed now through our payroll. We have been fully paid back by the bank for past fraud. We are working to protect our account and rarely pay by check; we try to pay by ACH. We bank with Truist and have a small account with Bank of America.

**Lisette Rodriguez motioned to approve the July financial statements, pending updated links made by Leonor (emailed to Finance Committee on 9/23/23 correction). A second was made by Rodney Bacher Motion passed.**

**Updates**

**Leonor Romero**

**990:** Draft is being finalized by vendor. Leonor expects to receive a copy this week. We are still within extension timeline. Leonor will share with the committee when she has a clean copy and would like an email vote in the interest of time.

**Employee Handbook Update:** Leonor shared it has been updated and reviewed by our attorney. The highlights will be shared with this committee next month. Staff are very excited to have the new handbook by next year; training will commence by staff level starting in October with the Management Team for the rollout for start of 2024.

Lisette suggests having all employees sign that they acknowledge receipt of it in future.

**Strategic Plan:** Felipe Pinzon shared we reviewed a first draft of our plan last week. It will all be reviewed this Saturday at our Board Retreat. By November we will have a plan for the next three years.

**Other Business:** Leonor Romero shared Miami-Dade County lags with contracts. We most likely will not know about Citizenship contract in full by February 2024.

It was shared, we will limit doing things manually and use a ticketing system (customized by Web Author), starting with Facilities, then IT and Marketing. That way we are more efficient and ability to track all requests. This will occur after first phase of implementation with programs.

**Adjourn**

**Lisette Rodriguez**

At 9:51am

**Next Meeting: Thursday, October 19, 2023 @9am**

**HISPANIC UNITY OF FLORIDA, INC.**

**FINANCIAL STATEMENTS**

For the Eight Months Ending August 31, 2023  
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

Prepared by: L. Romero 10/11/23  
FOR REVIEW BY CEO/FINANCE COMMITTEE  
SOURCE: SAGE PEACHTREE @ 08/31/23 / TR SCHEDULE



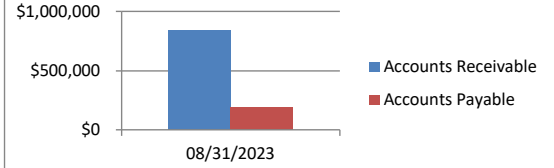
# 08/31/2023 Dashboard

## Revenue YTD Compared to Previous YTD

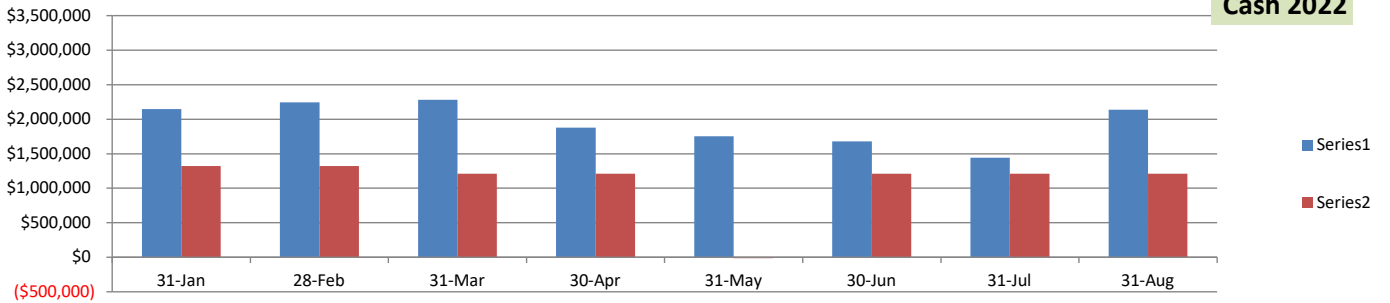
08/31/2023

	Revenue YTD as of 8/31/2023	Revenue YTD as of 8/31/2022	Year Over Year Chng
Unrestricted Revenue	\$5,607,260	\$2,471,740	\$3,135,519
Restricted Revenue	(\$166,856)	(\$545,913)	\$379,057
<b>Total Revenue</b>	<b>\$5,440,403</b>	<b>\$1,925,827</b>	<b>\$3,514,576</b>

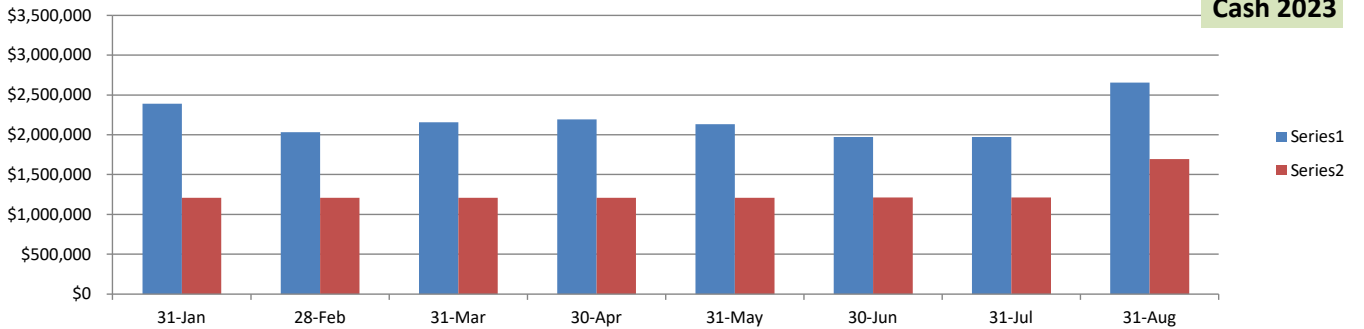
## Accounts Receivable Vs Payables August 2023



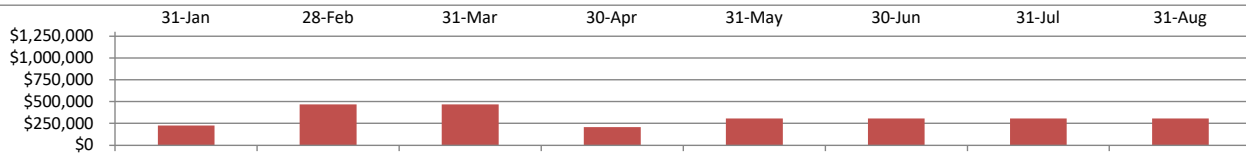
### Cash 2022



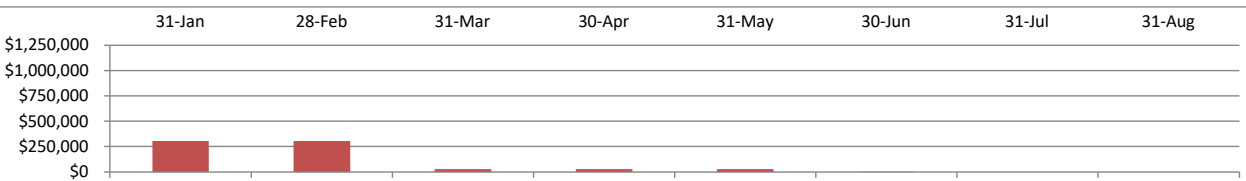
### Cash 2023



### Line of Credit Usage 2022



### Line of Credit Usage 2023



**Hispanic Unity of Florida, Inc.**  
Notes to Financials  
08/31/2023

UNR Net Assets

Preliminary

Reconciliation of UNR Net Assets:

1 Gain/(Loss) From Program Operations	1,714,145
2 Gain/(Loss) from Support Services	(56,943)
<b>Inc(Dec) in UNR Net Assets</b>	<b><u><u>\$ 1,657,202</u></u></b>

**Includes:**

From Net Assets "Released Prior Year"	(1,276,333) for current year operations
From Net Assets "Released Current Year"	(209,255)
Subtotal Released PY & CY	(1,485,589)
<b>YTD Actual Agency Over (Under)</b>	<b>171,613</b>

*The year-to-date projected operating deficit was \$11K. Our year-to-date actual was \$172K - includes prior year releases*

- 1) Development YTD had a unfavorable budget variance \$86K
- 2) Programs YTD had a favorable variance of \$1366K, includes Donor with Restrictions released totaling \$1.267M  
*includes New TR secured in 2023 for future years approx \$671K from: Community Foundation of Broward \$300K and Citifund \$500K.*
- 3) Admin YTD had a favorable budget variance of \$389K, includes Donor with Restrictions released totaling \$219K  
**Pending impact on revenues (net)**  
Review more releases for capitalized equipment

Cash

*Year to date increase (decrease) in cash by \$ 24,813 as a result of the following activities:*

\$ 171,613 Inc/(Dec) in Net Assets	
204,952 Adjustments to reconcile increase (decrease) in net assets	
376,565 Net cash provided (consumed) by operating activities	
(37,386) Investing Activities	
(314,366) Financing Activities	
\$ 24,813 increase (decrease) in cash	

**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF FINANCIAL POSITION**  
For the Eight Months Ending August 31, 2023  
(WITH COMPARATIVE TOTALS AS OF DECEMBER 31, 2022)

<u>ASSETS</u>	<u>2023</u>	<u>2022</u>
<b>Current Assets</b>		
Cash	2,653,827	\$ 2,629,014
Grants receivable, net	567,179	816,742
Unconditional promises to give, net	278,142	244,028
Prepaid expenses	80,991	31,666
<b>Total Current Assets</b>	<b>3,580,139</b>	<b>3,721,450</b>
<b>Non-Current Assets</b>		
Long term conditional promises to give	1,156,944	1,156,944
Property and equipment, net	1,119,604	1,181,560
Deposits and Other Assets	32,930	33,249
<b>Total Non-Current Assets</b>	<b>2,309,479</b>	<b>2,371,753</b>
<b>Total Assets</b>	<b>5,889,617</b>	<b>\$ 6,093,203</b>
<u>LIABILITIES AND NET ASSETS</u>		
<b>Current Liabilities</b>		
Accounts payable and accrued expenses	193,886	\$ 254,719
Mortgage payable, current	17,889	19,705
Line of credit	-	306,339
<b>Total Current Liabilities</b>	<b>211,774</b>	<b>580,763</b>
<b>Noncurrent Liabilities</b>		
Mortgage payable, net of current portion	731,153	737,365
<b>Total Non-Current Liabilities</b>	<b>731,153</b>	<b>737,365</b>
<b>Total Liabilities</b>	<b>942,928</b>	<b>1,318,128</b>
<b>Net Assets</b>		
Without Donor Restrictions	2,143,847	1,805,376
With Donor Restrictions	2,802,842	2,969,699
<b>Total Net Assets</b>	<b>4,946,689</b>	<b>4,775,075</b>
<b>Total Liabilities and Net Assets</b>	<b>5,889,617</b>	<b>\$ 6,093,203</b>

**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES**  
For the Eight Months Ending August 31, 2023  
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

					2022
		Without	With	Total	Total
		Donor Restrictions	Donor Restrictions		
<b>Revenues and Other Support:</b>					
Contributions	Contributions, with donor r \$	214,526	\$ 1,318,732	\$ 1,533,259	\$ 3,495,781
Special events		10,000	-	10,000	-
Grants from government agencies		3,325,101	-	3,325,101	4,575,834
Other grants and fees		291,941	-	291,941	534,236
Miscellaneous	Miscellaneous, with donor	279,623	\$ 480	280,103	277,239
Donations, in-kind		-	-	-	20,454
<b>Net assets released from restrictions:</b>					
	Satisfaction of time restrictions	1,485,589	(1,485,589)	-	-
	Satisfaction of program and purpose restrictions	480	(480)	-	-
<b>Total Revenues and Other Support</b>		<b>5,607,260</b>	<b>(166,856)</b>	<b>5,440,403</b>	<b>8,903,544</b>
<b>Expenses (Functional)</b>					
Program services		4,847,289	-	4,847,289	7,338,223
Management and general		368,812	-	368,812	368,317
Fundraising		52,688	-	52,688	42,657
<b>Total Expenses</b>		<b>5,268,789</b>	<b>-</b>	<b>5,268,789</b>	<b>7,749,197</b>
<b>Change in Net Assets</b>		<b>338,471</b>	<b>(166,856)</b>	<b>171,614</b>	<b>1,154,347</b>
Net Assets - Beginning of Year		1,805,376	2,969,699	4,775,075	3,620,728
Net Assets - End of Year		2,143,847	2,802,843	4,946,689	4,775,075

**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF CASH FLOWS**  
For the Eight Months Ending August 31, 2023  
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	<u>2023</u>	<u>2022</u>
Cash Flows from Operating Activities		
Increase (decrease) in net assets	\$ 171,613	\$ 1,154,347
Adjustments to reconcile increase (decrease) in net assets to cash provided by operating activities:		
Depreciation	99,660	140,009
Provision for uncollectible promises to give	-	-
Changes in assets and liabilities		
(Increase) decrease in grants receivable	249,564	19,249
(Increase) decrease in unconditional promises to give	(34,114)	(951,059)
(Increase) decrease in prepaid expenses	(49,326)	(6,446)
(Increase) decrease in security deposits and other assets	-	476
Increase (decrease) in accounts payable and accrued expenses	<u>(60,833)</u>	<u>52,658</u>
Total adjustments	<u>204,952</u>	<u>(745,113)</u>
Net Cash Provided by Operating Activities	<u>376,565</u>	<u>409,234</u>
Cash Flows from Investing Activities		
Acquisition of property and equipment, net of retirements	<u>(37,386)</u>	<u>(23,311)</u>
Net Cash (Used In) Investing Activities	<u>(37,386)</u>	<u>(23,311)</u>
Cash Flows from Financing Activities		
Net Advance (Repayment) of LOC	(306,339)	295,000
Borrowing (Repayment) of mortgage	<u>(8,028)</u>	<u>(18,656)</u>
Net Cash Provided by Financing Activities	<u>(314,366)</u>	<u>276,344</u>
Increase (decrease) in Cash	24,813	662,267
Cash - Beginning of Year	<u>2,629,014</u>	<u>1,966,747</u>
Cash - End of Year	<u>\$ 2,653,827</u>	<u>\$ 2,629,014</u>

**Cash Detail**  
**As of 08/31/2023**

***Without Donor Restrictions and With Donor Restrictions Cash:***

1010-000AAAS	Bank of America	Operating	51,880	
1025-000AAAS	BB&T	Payroll	13,614	
1026-000AAAS	BB&T	Operating	5,133	*Old
1000-000AAAS	Petty Cash	Imprest	500	
1028-000AAAS	BB&T	Operating	637,223	*New
1023-000AAAs	BB&T	Asset Reserve Fund	134,075	
1022-000AAAS	BB&T	Reserve Fund	118,155	<b>960,581</b> Without Donor Restrictions
1021-000AAAS	BB&T - Money Market	Opportunity Fund	513,697	
1024-000AAAS	BB&T - Money Market	Grantor Funding	1,179,549	<b>1,693,246</b> With Donor Restrictions

<b>\$</b>	<b>2,653,827</b>	<b>TOTAL CASH</b>
-----------	------------------	-------------------

Temp Restricted Schedule  
For the Eight Months Ending August 31, 2023

Awards Brought Forward to 2022	AREA	CC	December 31, 2022	Increase/ (Decrease)	Additions	Increase/ (Decrease)	August 31, 2023
TK Orange County Community Foundation	CFWP	508	90,055	(90,055)			(0)
The Wawa Foundation - To Support the Comprando Rico y Sano	PBWP	537	1,000	(1,000)			0
Unidos Medic Grant	AAAS	013	4,000	(4,000)			0
Community Foundation of Broward - Mitigating Data Issues Program	CFWP	506	17,399	(17,399)			(0)
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0422-3	PBWP	537	3,500	(3,500)			0
Unidos COV 19 Rapid Relief - COVID-19: 8/21- 12/21-2	EFWP	332	3,050	(3,050)			0
Kresge Foundation (The) - Kresge Foundation - Database	YDEP	004	186,000	(85,550)			100,450
Bank of America - Bank of America Grant for Vita	VSWP	301	20,000	-			20,000
Share Our Strength - No Kid Hungry (Marketing/Advocacy)	CFWP	547	36,702	(15,829)			20,873
UnidosUS - Comprando Rico y Sa - UnidosUS-RICOYS 1120 - 0622-923	PBWP	537	39,243	(39,243)			(0)
NALEO Educational Fund - 50% Grant - Final pymt	CZZP	606	22,348	(22,348)			0
Florida Blue Foundation - GRANT   Comp Rico y Sano (7/15/22-7/14/26)	PMWP	551	331,934	(64,036)			267,898
Health Foundation Te Ayudo 11-1-2021 - 10-31-2024 Due 1-5-2024	PBW	550	194,838	(55,925)			138,913
American Heart Assoc- Voices for Healthy Kids Travel 2023	EFWP	333	2,000	(2,000)			0
UnidosUS Comcast Digital Innov - 3rd final pmt Digital Innov Citizenship	CZZP	608	23,015	(11,127)			11,888
American Heart Assoc- Voices for Healthy Kids Travel 2024	EFWP	333	2,000	-			2,000
WeCount! - Florida Protecting Immigrant Families (4060)	PBWP	975	10,000	(10,000)			0
UnidosUS - Citizenship Savings - Grant Civic Engagement Citizenship	CZZP	156	3,750	(3,750)			0
Unidos US (Housing)	HCWP	574	43,846	(34,593)			9,252
Wells Fargo Foundaton - CWF Grant to support Financial	CFWP	500	35,000	(23,333)			11,667
Unidos Policy & Advocacy Medic - ACA final report due 8/8/22	AAAS	013	19,500	(19,500)			0
JP Morgan Chase Foundation - Workforce 2022-2023 General Ops	CFWP	510	140,146	(140,146)			0
American Health Healthy for Life: Initiative	PMWP	535	2,000	-			2,000
Unidos US HUD (Housing) 512 575	-	512	32,500	(11,446)			21,054
The William R. Watts Foundatio - Grant - FSP	FFEP	676	5,000	(5,000)			0
City of Hollywood Police Depart - LETF - U4T High School Grant	ODEP	167	10,000	(10,000)			0
Third Federal Bank (4060) - General	UUDES	000	50,000	(50,000)			0
Third Federal Bank (4060) - VITA	VSWP	302	15,000	(15,000)			0
Truist - IT/Technology Funding	CFWP	500	75,000	(37,569)			37,431
Comcast Foundation - Comcast U4T/STEM (4060)	STEP	440	20,000	(20,000)			0
Jim Moran Foundation - \$1,144,500 - \$381.5/3yrs 23,24,25	CFWP	503	1,092,786	(185,093)			907,693
Tate Foundation 2023,24,25 Com Fdt	UKEP	173	57,287	(20,000)			37,287
Florida Blue Foundation - GRANT   Citizenship	CZZP	610	100,000	(64,823)			35,177
Frederick Delucca Original Dates 9-1-2020 to 8-31-21. Started in Jan 2021 thru April 2022	ST	514	0	(0)			(0)
Jim Moran Foundation Research Grant 1-1-21 to 12-31-22	CFWP	531	19,024	(111)			18,913
TJMF - 9-01-18 - 8-31-23	Admin	000	130,170	(79,300)			50,870
Frederick Delucca 9/22-8/23	CFWP	514	114,939	(114,939)			0
Protecting Immigrant Families	VITA	302	-	-	15,000	(15,000)	0
Early Learning Coalition - ARP - ARPA Grant U4K	UKEP	173	-	-	17,887	(17,887)	0
Broward County Sheriff's Office - U4T GRANT - LETF	ODEP	167	-	-	-	-	0
UnidosUS-Robert Wood Johnson F -	PBWP	561	-	-	62,000	(32,585)	29,415
TD Charitable Foundation - Grant to Support FinCap Program	CFWP	500	-	-	7,500	-	7,500
Jim Moran - Flood Emergency	EFWP	340	-	-	30,000	(19,899)	10,101
Community Broward Fdn	CFWP	506	-	-	300,000	(11,850)	288,150
Wawa - CRS	PBWP	537	-	-	1,500	(1,500)	0
Fort Lauderdale Rotary Foundation	UKEP	171	-	-	2,500	(2,500)	0
Community Broward Fdn	EFWP	339	-	-	20,000	-	20,000
Citigroup-Citi Community Devel - Workforce development & financial inclusion CWF	CFWP	570	-	-	20,000	-	20,000
Early Learning Coalition - ARP - ARPA Grant U4K	UKEP	173	-	-	14,147	(14,147)	0
Bank of America - Bank of America Grant for Vita	VSWP	301	-	-	20,000	(20,000)	0
TIAA Bank - Grant from TIAA Bank for CWF	CFWP	500	-	-	5,000	(5,000)	0
Wells Fargo Foundaton - CWF Grant to support Financial	CFWP	500	-	-	35,000	(35,000)	0
Capital One - Grant for CWF- Financial Capability and Wealth Building	HCWP	570	-	-	25,000	(25,000)	0
Unidos Medic Grant	AAAS	013	-	-	42,000	-	42,000
NALEO Educational Fund - 50% Grant - Final pymt	CZZP	606	-	-	68,750	(6,834)	61,916
Global Innovation Challenge- Citi Foundation 10/23-9/25 2 yrs	PBWP	509	-	-	500,000	-	500,000
Prosperity Now	VSWP	304	-	-	11,000	(605)	10,395
NAC - Citizenship : 8/7/23-7/31/24	CZZP	156	-	-	15,000	-	15,000
Unidos US - EE Travel Stipend	CFWP	500	-	-	1,448	(1,448)	0
UnidosUS - Citizenship Savings - Grant Civic Engagement Citizenship 2022-2023	CZZP	156	-	-	5,000	-	5,000
Florida Panthers Community Foundation - U4T - Middle School	STEP	441	-	-	15,000	-	15,000
Comcast Foundation - Comcast U4T/STEM (4060)	STEP	440	-	-	20,000	-	20,000
Third Federal Bank (4060) - General	UUDES	000	-	-	50,000	-	50,000
Third Federal Bank (4060) - VITA	VSWP	302	-	-	15,000	-	15,000
			2,969,699	(1,276,333)	1,318,732	(209,255)	2,802,842

YTD Satisfaction of Time Restrictions \$ (1,485,589)

Breakout	
Prior Year Carry over Restrictions	2,969,699
CY Restricted contributions revenues - FROM TB	1,318,732
CY Restricted Miscellaneous revenue - FROM TB	480
Available restricted revenues	4,288,911
Release of Restrictions	(1,485,589) FS
Remaining Available Restricted Net Assets	2,803,322
Temp Restricted Net Assets @ Y/E	(2,802,842)
Satisfaction of program and purpose restrictions	480 FS

**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES - TOTAL**  
For the Eight Months Ending August 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
<b>Revenues</b>						
Donations - UNR	\$ 21,217	\$ 39,167	\$ (17,950)	\$ 214,526	\$ 313,333	\$ (98,807)
Donations - TR	632,448	91,637	540,811	1,318,732	733,111	585,621
Satisfaction of Restrictions	236,562	118,478	118,084	1,485,588	947,813	537,775
Fundraising Events	-	6,667	(6,667)	10,000	53,333	(43,333)
Grant Income	198,533	443,028	(244,495)	3,615,567	3,544,222	71,345
Interest Income	5,551	0	5,551	22,510	0	22,510
Rental Income	4,707	0	4,707	36,970	0	36,970
Voluntary Pre-K	4,690	0	4,690	44,224	0	44,224
Fees & Miscell Income	23,627	26,650	(3,023)	177,874	213,200	(35,326)
<b>Total Revenues</b>	<b>1,127,335</b>	<b>725,627</b>	<b>401,708</b>	<b>6,925,991</b>	<b>5,805,012</b>	<b>1,120,979</b>
<b>Expenses</b>						
Salaries and benefits	416,242	567,112	(150,870)	3,659,410	4,536,826	(877,416)
Advertising	8,972	3,624	5,348	29,398	29,004	394
Bank service charges	966	750	216	10,655	6,000	4,655
Building repairs/maint	26,128	10,076	16,052	189,775	80,602	109,173
Depreciation	12,417	12,083	334	99,341	96,667	2,674
Dues Subscriptions	617	1,400	(783)	11,675	11,196	479
Information Technology	11,720	11,692	28	123,647	93,537	30,110
Database Management System	3,500	4,848	(1,348)	35,586	38,789	(3,203)
Insurance	5,742	6,921	(1,179)	48,683	55,372	(6,689)
Interest expense	3,469	5,200	(1,731)	37,709	41,600	(3,891)
Licenses and permits	315	403	(88)	5,209	3,220	1,989
Mileage reimbursement	1,324	2,849	(1,525)	18,742	22,778	(4,036)
Travel/Conference	941	1,337	(396)	15,304	10,696	4,608
Miscellaneous	273	141	132	4,293	1,304	2,989
Office expense	7,346	5,501	1,845	43,514	44,016	(502)
Postage and shipping	546	413	133	3,072	3,298	(226)
Printing	2,823	3,126	(303)	35,601	25,000	10,601
Professional fees	35,023	18,977	16,046	246,023	151,803	94,220
Program expenses	44,470	45,358	(888)	405,330	362,804	42,526
Public relations	259	583	(324)	7,671	4,667	3,004
Rent	7,698	2,233	5,465	35,354	17,867	17,487
Staff events/meetings	0	663	(663)	8,716	5,303	3,413
Special fundraising events	13,305	2,292	11,013	16,370	18,333	(1,963)
Staff training and development	6,003	5,011	992	48,459	40,092	8,367
Telephone - all	11,546	10,845	701	98,783	86,749	12,034
Utilities	3,729	3,578	151	30,467	28,626	1,841
Administrative Cost (net)	(1)	3	(4)	2	1	1
<b>Total Expenses</b>	<b>625,373</b>	<b>727,019</b>	<b>(101,646)</b>	<b>5,268,788.94</b>	<b>5,816,150</b>	<b>(547,361)</b>
<b>Increase (Decrease) in UNR Assets</b>	<b>\$ 501,962</b>	<b>(\$ 1,392)</b>	<b>\$ 503,354</b>	<b>1,657,202</b>	<b>(\$ 11,138)</b>	<b>\$ 1,668,340</b>

Programs	\$ 1,714,145
Support	\$ (56,943)
<b>Total</b>	<b>\$ 1,657,202</b>

**Increase (Decrease) in UNR Assets \$ 1,657,202 subtotal**

**Less:**  
**Net Assets "Released Prior Year"** Without Donor Restrictions (1,276,333)  
**Net Assets "Released Current Year"** Without Donor Restrictions (209,255)  
**YTD Actual Agency Deficit 171,613** includes Depreciation \$ **167**



**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES - PROGRAMS**  
For the Eight Months Ending August 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
<b>Revenues</b>						
Donations - UNR		-	-	33,557	-	33,557
Donations - TR	582,448	81,837	500,611	1,226,732	654,714	572,018
Satisfaction of Restrictions	216,088	92,760	123,328	1,260,300	742,069	518,231
Grant Income	198,533	443,028	(244,495)	3,617,042	3,544,222	72,820
Rental Income	4,707	-	4,707	36,970	-	36,970
Voluntary Pre-K	4,690	-	4,690	44,224	-	44,224
Fees & Miscell Income	23,627	26,650	(3,023)	175,819	213,200	(37,381)
<b>Total Revenues</b>	<b>1,030,093</b>	<b>644,275</b>	<b>385,818</b>	<b>6,394,644</b>	<b>5,154,205</b>	<b>1,240,439</b>
<b>Expenses</b>						
Salaries and benefits	338,824	454,768	(115,944)	3,050,980	3,638,078	(587,098)
Advertising	8,972	2,416	6,556	28,823	19,337	9,486
Building repairs/maint	16,719	362	16,357	135,369	2,893	132,476
Depreciation	11,022	-	11,022	88,178	-	88,178
Dues Subscriptions	117	-	117	1,521	-	1,521
Information Technology	12,284	182	12,102	104,825	1,457	103,368
Database Management System	-	208	(208)	-	1,667	(1,667)
Insurance	5,673	-	5,673	45,384	-	45,384
Interest expense	3,022	-	3,022	27,933	-	27,933
Licenses and permits	-	403	(403)	-	3,220	(3,220)
Mileage reimbursement	1,219	2,707	(1,488)	16,798	21,645	(4,847)
Miscellaneous	-	162	(162)	-	1,297	(1,297)
Travel/Conference	-	-	-	1,549	-	1,549
Office expense	5,445	5,493	(48)	33,627	43,949	(10,322)
Postage and shipping	326	151	175	2,484	1,208	1,276
Printing	4,592	512	4,080	39,579	4,090	35,489
Professional fees	4,276	6,494	(2,218)	54,278	51,943	2,335
Program expenses	44,470	45,069	(599)	401,330	360,493	40,837
Rent	13,607	-	13,607	46,215	-	46,215
Software	5,000	-	5,000	35,586	672	34,914
Staff training and development	2,864	2,845	19	31,863	22,758	9,105
Telephone	6,207	1,731	4,476	47,037	13,852	33,185
Telephone - Cell/HotSpots	6,352	2,109	4,243	49,765	16,857	32,908
Utilities	2,894	-	2,894	26,710	-	26,710
Administrative Cost (net)	27,228	75,037	(47,809)	410,665	600,275	(189,610)
<b>Total Expenses</b>	<b>521,113</b>	<b>600,649</b>	<b>(79,536)</b>	<b>4,680,499</b>	<b>4,805,691</b>	<b>(125,192)</b>
<b>Increase (Decrease) in UNR Assets</b>	<b>508,980</b>	<b>43,626</b>	<b>465,354</b>	<b>1,714,145</b>	<b>348,514</b>	<b>1,365,631</b>

Toward Administrative and Fixed Costs

\$ 2,277,859

**HISPANIC UNITY OF FLORIDA, INC.**  
**STATEMENT OF ACTIVITIES - SUPPORT**  
For the Eight Months Ending August 31, 2023

	Month Actual	Month Budget	Over (Under)	Year to Date Actual	Year to Date Budget	Over (Under)
<b>Revenues</b>						
Donations - UNR	\$ 20,957	\$ 39,167	(\$ 18,210)	\$ 180,969	\$ 313,333	(\$ 132,364)
Donations - TR	50,000	9,800	40,200	92,000	78,397	13,603
Satisfaction of Restrictions	20,474	25,718	(5,244)	225,288	205,744	19,544
Fundraising Events	0	6,667	(6,667)	10,000	53,333	(43,333)
Grant Income	0	0	0	0	0	-
Interest Income	5,551	0	5,551	22,510	0	22,510
Rental Income	0	0	0	0	0	-
Voluntary Pre-K	0	0	0	0	0	-
Fees & Miscell Income	0	0	0	580	0	580
<b>Total Revenues</b>	<b>96,982</b>	<b>81,352</b>	<b>15,630</b>	<b>531,347</b>	<b>650,807</b>	<b>(119,460)</b>
<b>Expenses</b>						
Salaries and benefits	77,418	112,344	(34,926)	608,430	898,748	(290,318)
Advertising	0	1,208	(1,208)	575	9,667	(9,092)
Bank service charges	966	750	216	10,655	6,000	4,655
Building repairs/maint	9,409	9,714	(305)	54,406	77,709	(23,303)
Depreciation	1,395	12,083	(10,688)	11,163	96,667	(85,504)
Dues Subscriptions	500	1,400	(900)	10,154	11,196	(1,042)
Information Technology	(564)	11,510	(12,074)	18,822	92,080	(73,258)
Database Mgmt System	0	4,500	(4,500)	0	36,000	(36,000)
Database Management System	0	56	(56)	0	450	(450)
Insurance	69	6,921	(6,852)	3,299	55,372	(52,073)
Interest expense	447	5,200	(4,753)	9,776	41,600	(31,824)
Licenses and permits	315	0	315	5,209	0	5,209
Lobbying	0	0	0	0	0	0
Mileage reimbursement	105	142	(37)	1,944	1,133	811
Travel/Conference	941	1,337	(396)	13,755	10,696	3,059
Miscellaneous	273	(21)	294	4,293	7	4,286
Office expense	1,901	8	1,893	9,887	67	9,820
Postage and shipping	220	262	(42)	588	2,090	(1,502)
Printing	(1,769)	2,614	(4,383)	(3,978)	20,910	(24,888)
Professional fees	30,747	12,483	18,264	191,745	99,860	91,885
Program expenses	0	289	(289)	4,000	2,311	1,689
Public relations	259	583	(324)	7,671	4,667	3,004
Rent	(5,909)	2,233	(8,142)	(10,861)	17,867	(28,728)
Special fundraising events	13,305	2,292	11,013	16,370	18,333	(1,963)
Staff events/meetings	0	663	(663)	8,716	5,303	3,413
Staff training and development	3,139	2,166	973	16,596	17,334	(738)
Telephone	117	5,792	(5,675)	1,514	46,336	(44,822)
Telephone - Cell/HotSpots	(1,130)	1,213	(2,343)	467	9,704	(9,237)
Utilities	835	3,578	(2,743)	3,757	28,626	(24,869)
Administrative Cost (net)	(27,229)	(75,034)	47,805	(410,663)	(600,274)	189,611
<b>Total Expenses</b>	<b>105,760</b>	<b>126,286</b>	<b>(20,526)</b>	<b>588,290</b>	<b>1,010,459</b>	<b>(422,169)</b>
<b>Increase (Decrease) in UNR Assets</b>	<b>(\$ 8,778)</b>	<b>(\$ 44,934)</b>	<b>\$ 36,156</b>	<b>(\$ 56,943)</b>	<b>(\$ 359,652)</b>	<b>\$ 302,709</b>

**Governance Committee**  
Meeting Minutes  
Friday, October 6, 2023 | 9:00 AM

**Call to Order / Roll Call**

**Tony Abbate and Felina Furer**

Began at 9am

**Attending:** Tony Abbate, Maria Elena Ferrer, Angie Stone, Maria Barnard, Christina Paradowski and Maritza Alvarez

**Excused:** Giselle Cushing

**Absent:** Lucia Rodriguez, and Melida Akiti

**Approval of June & August 2023 Minutes**

**Tony Abbate**

**Maria Barnard motioned to approve June and August 2023 minutes. A second was made by Angie Stone. Motion passed.**

**Dan Schevis**

**Felipe Pinzon**

Dan Schevis submitted his resignation from the Board, citing personal reasons. Committee members were encouraged to express gratitude to him for his dedicated service and significant advocacy for HUF. Members are urged to reach out and convey appreciation for his contributions.

**Lucia Rodriguez**

**Tony Abbate**

Lucia Rodriguez has committed to extending her tenure on the HUF board for an additional year, concluding in 2024.

**2024 Slate of Officers**

**Tony Abbate**

A change to the bylaws was suggested: to remove “treasurer” in bylaws and replace for “officer”, to be more inclusive.

**Christina Paradowski motioned to recommend the strike of treasurer to officer word in bylaws. A second was made by Maria Elena Ferrer. Motion passed.**

**Slate of Officers 2024**

After careful consideration and thoughtful deliberation with committee members, Tony Abbate presented the much-anticipated 2024 slate of officers.

Chair: Tony Abbate

Chair Elect: Maritza Alvarez

Treasurer: Lisette Rodriguez

Secretary: Carolina Cardozo

Past Chair: Christina Paradowski

**Maria Barnard motioned to recommend the 2024 Slate of Officers to the Board. A second was made by Maria Elena Ferrer. Motion passed.**

The recommendation for the 2024 Slate of Officers will be presented to the Board during the October board meeting. Subsequently, the voting process for the slate is scheduled to take place during the November BOD meeting.

<b>2024 Board Meetings</b>	<b>Tony Abbate</b>
----------------------------	--------------------

- a) Day and Time: 8 -10am, 9 -11am or keep 4 - 6pm was proposed. The regular Tuesday meetings will be rescheduled to the 3rd and 4th of each month. To facilitate the board vote, options will be presented using either Survey Monkey or Doodle, with further details to be provided in the next days.
  
- b) Number of Meetings: Tony advocates for maintaining a minimum number of in-person meetings, emphasizing the success of the board retreat as a notable example. An option under consideration is reducing the annual meetings from 10 to 8. A specific suggestion is to eliminate meetings in March and October, as well as the usual break in July and August. The proposal encourages a careful examination of Advocacy and Finance calendars. Notably, December, January, April, and May are identified as mission-critical months.

Christina proposed a schedule adjustment, recommending the elimination of meetings in March and October. Additionally, she suggested a hiatus during June and July to allow for a summer break. To compensate, there's a proposal to hold the August meeting on the 3rd or 4th Tuesday instead.

- c) Board Retreat: Scheduling a meeting in Quarter 3 is deemed sensible to facilitate budgeting for the subsequent year. The proposition is to retain the board retreat in September to align with this objective.

Tony is urging committees to consider a blend of in-person and virtual meetings, suggesting that quarterly meetings might suffice instead of monthly. He's requested all committee Chairs to furnish a 2024 schedule to the incoming Chair, with a finalized date and time agreed upon by December for better coordination with staff.

The notion of a minimum of 4 in-person and 4 virtual or hybrid meetings is up for further discussion, and Tony is against mandating in-person meetings.

Additionally, the proposal to amend the bylaws, shifting the annual meeting from May, with Christina tasked to handle the update.

**Recruitment**

**Tony Abbate**

- a) Alexandra Palau: Maria Barnard highlighted that Alexandra possesses a robust marketing background with a data-driven approach. She emphasized that she would make a valuable addition to the Marketing committee.

**Angie Stone motioned to recommend Alexandra Palau to HUF BOD. A second was made by Maria Barnard. Motion passed.**

**Finance Committee**

**Felipe Pinzon**

Felipe has pinpointed a recurring quorum issue within the committee, emphasizing that Christina Paradowski's consistent attendance has played a crucial role in maintaining quorum. Without Christina's consistent attendance, the quorum would not have been met on numerous occasions. In response, a plan has been suggested, and both Tony and Felipe have agreed to meet with Lissette to address the matter. Please continue recruiting additional members to this committee.

Furthermore, Felina Furer has volunteered to facilitate the scheduling of a coffee meeting in November with Lissette, Felipe, and Tony.

**Adjourn**

At 10:03am

**Next Meeting: Friday, November 3rd @9am**

**Hispanic Unity of Florida**  
**Public Policy & Advocacy**  
**Committee Meeting**  
**MINUTES**  
**Friday, September 8, 2023**

**Present:** Carolina Cardozo, Robby Holroyd, Dr. Jeff Nasse, Dr. Maria Bernard, Kersti Myles, Nazbi Chowdhury, Nicholas Hessing, Otto Valenzuela, Felina Rosales-Furer, and Felipe Pinzon

**Excused:** Christina Paradowski, Maggie Zalamea, Dick Blattner

**Absent:** Dan Schevis and Megan Turetsky

**Roll Call**

Began at 9:05am

**Approve July 2023 Minutes**—Presented by Otto Valenzuela

**Motion**

**Carolina Cardozo moved to approve the July 2023 minutes. Kersti Myles gave a second. Motion passed.**

**HUF's PP&A Activities Update**—Presented by Otto Valenzuela & Felipe Pinzon

- 2024 Appropriations Request: In 2024, our collaborative efforts will involve working closely with Ashley Boxer to submit another request. Our strategy will continue to leverage the HEAL program, seamlessly integrating it with the resources and support offered by the Center for Working Families. This partnership aims to maximize our impact and effectively address the multifaceted needs of our community, reaffirming our commitment to holistic well-being and sustainable progress.
- Tallahassee Visits/Important Dates: On October 16th and 17th, 2023, Felipe and Ashley Boxer will conduct the first visit to Tallahassee. Otto will visit with United Way on November 7-8 and Felipe will return in the second week of December. Additionally, our presence will be maintained as we will be represented at Broward Days in January 2024 and Felipe is scheduled for another visit in mid-January 2024. We will continue maintaining a presence in Tallahassee as much as possible to show our continued active participation and visibility in Tallahassee,
- Otto shared that on August 7<sup>th</sup>, Rep. Chip LaMarca came and read to our Unity4Kids. Soon we have Broward County Administrator Monica Cepero and Reps. Hillary Cassell and Marie Woodson scheduled to read too.
- Sign-on letters:
  - Naturalization Working Group; National Association of Latino Elected and Appointed Officials (NALEO) Educational Fund: sign on public comment letter regarding request to lower U.S. Citizenship and Immigration Services (USCIS) fees for individuals applying for citizenship.
  - Florida Immigrant Coalition (FLIC): Sign on letter requesting to County Mayors to enact and widely publicize policies to protect immigrant communities in the recovery efforts of Hurricane Idalia.

**HUF Strategic Planning Update**--Presented by Otto Valenzuela

- Committee's Results: This Committee voted on the top three next steps to further the original objectives related to public policy and advocacy put forth by HUF's strategic planning committee.
- Next Steps: HUF's Strategic Planning committee is scheduled to convene for vetting on October 16, followed by the Board of Director's comprehensive review during the board retreat on October 23rd. The Board's objective during this retreat will be to thoroughly assess the plan, suggest the most pertinent next steps to complete original objectives, and provide approval. Elements of this strategic plan will be seamlessly integrated into the upcoming 2024 fiscal year budget, ensuring a cohesive and aligned approach to our organizational goals and initiatives.

## **HUF 2024 Public Policy Agenda: First Draft**

Otto presented the first draft of HUF's annual Public Policy Agenda, that includes: Economic Development, Health, and Education. Once again, the agenda has a strong emphasis on state-wide issues. The discussion revolved around the format of the agenda, with Nazbi Chowdhury advocating for a concise one-pager to engage effectively with representatives, preventing information overload. To align with this approach, there were considerations about placing the Health section either at the top or bottom of the agenda, based on its priority for appropriations. Robby Holroyd suggested moving appropriation items to the top and including associated numbers to highlight their significance.

Further deliberation focused on restructuring the Health section, with the proposal to relocate the bullet point related to "close access gap" to the third position, recognizing the sensitivity of the topic of expanding Medicaid. Additionally, given the Senate President's theme for the year, "Live Healthy," it was suggested to include contact information on the one-pager for enhanced communication.

In a separate update, Otto mentioned that the E-Verify workshops had a turnout of 20 business owners. Robby added that enforcement for E-Verify would commence in 2024, but there was awareness that this could be subject to changes in upcoming legislative sessions.

### **Adjourn**

At 9:50am

**Next Meeting: Friday, October 13<sup>th</sup> @ 9am**

**Hispanic Unity of Florida  
Public Policy & Advocacy  
Committee Meeting  
MINUTES  
Friday, October 13, 2023**

**Present:** Carolina Cardozo, Nic Hessing, Nazbi Chowdhury, Dick Blattner, Dr. Maria Bernal, Kersti Myles, Felipe Pinzon, Felina Furer and Otto Valenzuela

**Excused:** Dr. Jeff Nasse and Maggie Zalamea

**Absent:** Megan Turetsky and Robby Holroyd

**Roll Call**

Began at 9:00 AM

**Approve September 2023 Minutes** — Presented by Carolina Cardozo

**Motion**

**Nazbi Chowdhury moved to approve the September 2023 minutes. Kersti Myles gave a second. Motion passed.**

**HUF's PP&A Activities Update**— Presented by Otto Valenzuela

Throughout Hispanic Heritage Month, which spans from September 15th to October 15th, HUF has been actively engaged in celebratory activities; HUF is informally extending its celebration through October with more activities. On September 28th, Broward County Administrator Monica Cepero was honored with a recognition from HUF as the first Hispanic County Administrator during a small event at HUF where she also read to Unity4Kids. Several elected officials were in attendance and was used to highlight Hispanic Heritage month at HUF.

Representative Hillary Cassel visited Unity4Kids to read to the kids where she received a recognition for her work on HUF's 2024 Appropriations Request. Additionally, she witnessed a cooking demonstration for our Te Ayudo program.

Looking ahead, HUF will hold its 10<sup>th</sup> annual Entrepreneur Summit on October 20th at NSU. This event is open to the public and free, and everyone is encouraged to share information within their network.

In committee news, Otto shared that Dan Schevis has stepped down from both the HUF's PP&A committee and the HUF Board of Directors. His departure was acknowledged with well wishes and gratitude for his many years of dedicated service.

**Appropriations Request Update:**

The 2024 request is strategically centered on HUF's HEAL mental health program and the Center for Working Families (workforce development), emphasizing the crucial link between mental wellness and a productive workforce. The House sponsor for our request is Rep. Griff Griffiths, and Senator Lauren Book will once again lend her sponsorship to our bill, showcasing bipartisan support. Incoming House Speaker Danny Perez helped secure the support of Rep. Griffiths who is from the Panama City area but despite the distance from South Florida has pledged support for HUF. Otto shared key dates to enhance the success of our appropriation request.

Carolina Cardozo proposed the idea of inviting Rep. Griff Griffiths to HUF to witness our programs in action, and there's a hope to facilitate a meeting with a client during the visit.

There is an invitation for others to join Otto at Broward Days in January, as in years past. HUF also plans on bringing the Director of the HEAL program, Dr. Maritza Torres to Tallahassee to speak on the program directly with elected officials.

**HUF Strategic Planning**

The top three suggestions, which emerged from discussions at the HUF board retreat held last month, have paved the way for the next strategic steps over the next three-five years. The focus will be on increasing HUF's visibility within the community, facilitating discussions on PP&A matters with corporate partners and HUF client families, establishing HUF's leadership development program, and crafting an engagement plan for staff, committee members, and clients. A final report on these initiatives will be presented to the board by December.



In response to a query from Commissioner Dick Blattner, Otto will explore the possibility of having the Citizenship program attendees host their swear-in ceremony at City Hall in Hollywood.

**HUF 2024 Public Policy Agenda: Second Draft**

Otto presented a one-pager for sharing information about HUF, featuring a graphic to enhance visual appeal. The plan includes a website linked to a QR code, connecting users to both our website and the United Way ALICE report. In response to feedback, Nazbi recommended replacing the term "recommendation" with a stronger call to action. Additionally, Nic Hessing suggested incorporating specifics, possibly in the form of a white paper or dedicated section.

Upon discussion and questions regarding point number one on the Health section that addressed HUF's appropriation request, it was decided that it was best to separate the appropriations request info from the policy agenda. HUF will now work on two separate documents, similar to what was done last year.

To refine the document further, Felipe will seek feedback from Ashley Boxer and Robby Holroyd for the second draft. Simultaneously, Otto will collaborate with the Marketing department on a secondary document, with the aim of finalizing and voting on it at the November meeting.

**November Meeting Change:**

The options for scheduling were narrowed down to either Friday, November 3rd, or Thursday, November 9th.

The Committee decided to meet on Friday, November 3rd.

**Adjourn**

At 10am

**Next Meeting: Friday, November 3<sup>rd</sup> @ 9am**

**Hispanic Unity of Florida**  
**Public Policy & Advocacy**  
**Committee Meeting**  
**MINUTES**  
**Friday, October 13, 2023**

**Present:** Carolina Cardozo, Nic Hessing, Nazbi Chowdhury, Dick Blattner, Dr. Maria Bernal, Kersti Myles, Felipe Pinzon, Felina Furer and Otto Valenzuela

**Excused:** Dr. Jeff Nasse and Maggie Zalamea

**Absent:** Megan Turetsky and Robby Holroyd

**Roll Call**

Began at 9:00 AM

**Approve September 2023 Minutes** — Presented by Carolina Cardozo

**Motion**

**Nazbi Chowdhury moved to approve the September 2023 minutes. Kersti Myles gave a second. Motion passed.**

**HUF's PP&A Activities Update**— Presented by Otto Valenzuela

Throughout Hispanic Heritage Month, which spans from September 15th to October 15th, HUF has been actively engaged in celebratory activities; HUF is informally extending its celebration through October with more activities. On September 28th, Broward County Administrator Monica Cepero was honored with a recognition from HUF as the first Hispanic County Administrator during a small event at HUF where she also read to Unity4Kids. Several elected officials were in attendance and was used to highlight Hispanic Heritage month at HUF.

Representative Hillary Cassel visited Unity4Kids to read to the kids where she received a recognition for her work on HUF's 2024 Appropriations Request. Additionally, she witnessed a cooking demonstration for our Te Ayudo program.

Looking ahead, HUF will hold its 10<sup>th</sup> annual Entrepreneur Summit on October 20th at NSU. This event is open to the public and free, and everyone is encouraged to share information within their network.

In committee news, Otto shared that Dan Schevis has stepped down from both the HUF's PP&A committee and the HUF Board of Directors. His departure was acknowledged with well wishes and gratitude for his many years of dedicated service.

**Appropriations Request Update:**

The 2024 request is strategically centered on HUF's HEAL mental health program and the Center for Working Families (workforce development), emphasizing the crucial link between mental wellness and a productive workforce. The House sponsor for our request is Rep. Griff Griffiths, and Senator Lauren Book will once again lend her sponsorship to our bill, showcasing bipartisan support. Incoming House Speaker Danny Perez helped secure the support of Rep. Griffiths who is from the Panama City area but despite the distance from South Florida has pledged support for HUF. Otto shared key dates to enhance the success of our appropriation request.

Carolina Cardozo proposed the idea of inviting Rep. Griff Griffiths to HUF to witness our programs in action, and there's a hope to facilitate a meeting with a client during the visit.

There is an invitation for others to join Otto at Broward Days in January, as in years past. HUF also plans on bringing the Director of the HEAL program, Dr. Maritza Torres to Tallahassee to speak on the program directly with elected officials.

**HUF Strategic Planning**

The top three suggestions, which emerged from discussions at the HUF board retreat held last month, have paved the way for the next strategic steps over the next three-five years. The focus will be on increasing HUF's visibility within the community, facilitating discussions on PP&A matters with corporate partners and HUF client families, establishing HUF's leadership development program, and crafting an engagement plan for staff, committee members, and clients. A final report on these initiatives will be presented to the board by December.

In response to a query from Commissioner Dick Blattner, Otto will explore the possibility of having the Citizenship program attendees host their swear-in ceremony at City Hall in Hollywood.

**HUF 2024 Public Policy Agenda: Second Draft**

Otto presented a one-pager for sharing information about HUF, featuring a graphic to enhance visual appeal. The plan includes a website linked to a QR code, connecting users to both our website and the United Way ALICE report. In response to feedback, Nazbi recommended replacing the term "recommendation" with a stronger call to action. Additionally, Nic Hessing suggested incorporating specifics, possibly in the form of a white paper or dedicated section.

Upon discussion and questions regarding point number one on the Health section that addressed HUF's appropriation request, it was decided that it was best to separate the appropriations request info from the policy agenda. HUF will now work on two separate documents, similar to what was done last year.

To refine the document further, Felipe will seek feedback from Ashley Boxer and Robby Holroyd for the second draft. Simultaneously, Otto will collaborate with the Marketing department on a secondary document, with the aim of finalizing and voting on it at the November meeting.

**November Meeting Change:**

The options for scheduling were narrowed down to either Friday, November 3rd, or Thursday, November 9th.

The Committee decided to meet on Friday, November 3rd.

**Adjourn**

At 10am

**Next Meeting: Friday, November 3<sup>rd</sup> @ 9am**

**Hispanic Unity of Florida**  
**Public Policy & Advocacy**  
**Committee Meeting**  
**MINUTES**  
**Friday, October 13, 2023**

**Present:** Carolina Cardozo, Nic Hessing, Nazbi Chowdhury, Dick Blattner, Dr. Maria Bernal, Kersti Myles, Felipe Pinzon, Felina Furer and Otto Valenzuela

**Excused:** Dr. Jeff Nasse and Maggie Zalamea

**Absent:** Megan Turetsky and Robby Holroyd

**Roll Call**

Began at 9:00 AM

**Approve September 2023 Minutes** — Presented by Carolina Cardozo

**Motion**

**Nazbi Chowdhury moved to approve the September 2023 minutes. Kersti Myles gave a second. Motion passed.**

**HUF's PP&A Activities Update**— Presented by Otto Valenzuela

Throughout Hispanic Heritage Month, which spans from September 15th to October 15th, HUF has been actively engaged in celebratory activities; HUF is informally extending its celebration through October with more activities. On September 28th, Broward County Administrator Monica Cepero was honored with a recognition from HUF as the first Hispanic County Administrator during a small event at HUF where she also read to Unity4Kids. Several elected officials were in attendance and was used to highlight Hispanic Heritage month at HUF.

Representative Hillary Cassel visited Unity4Kids to read to the kids where she received a recognition for her work on HUF's 2024 Appropriations Request. Additionally, she witnessed a cooking demonstration for our Te Ayudo program.

Looking ahead, HUF will hold its 10<sup>th</sup> annual Entrepreneur Summit on October 20th at NSU. This event is open to the public and free, and everyone is encouraged to share information within their network.

In committee news, Otto shared that Dan Schevis has stepped down from both the HUF's PP&A committee and the HUF Board of Directors. His departure was acknowledged with well wishes and gratitude for his many years of dedicated service.

**Appropriations Request Update:**

The 2024 request is strategically centered on HUF's HEAL mental health program and the Center for Working Families (workforce development), emphasizing the crucial link between mental wellness and a productive workforce. The House sponsor for our request is Rep. Griff Griffiths, and Senator Lauren Book will once again lend her sponsorship to our bill, showcasing bipartisan support. Incoming House Speaker Danny Perez helped secure the support of Rep. Griffiths who is from the Panama City area but despite the distance from South Florida has pledged support for HUF. Otto shared key dates to enhance the success of our appropriation request.

Carolina Cardozo proposed the idea of inviting Rep. Griff Griffiths to HUF to witness our programs in action, and there's a hope to facilitate a meeting with a client during the visit.

There is an invitation for others to join Otto at Broward Days in January, as in years past. HUF also plans on bringing the Director of the HEAL program, Dr. Maritza Torres to Tallahassee to speak on the program directly with elected officials.

**HUF Strategic Planning**

The top three suggestions, which emerged from discussions at the HUF board retreat held last month, have paved the way for the next strategic steps over the next three-five years. The focus will be on increasing HUF's visibility within the community, facilitating discussions on PP&A matters with corporate partners and HUF client families, establishing HUF's leadership development program, and crafting an engagement plan for staff, committee members, and clients. A final report on these initiatives will be presented to the board by December.

In response to a query from Commissioner Dick Blattner, Otto will explore the possibility of having the Citizenship program attendees host their swear-in ceremony at City Hall in Hollywood.

**HUF 2024 Public Policy Agenda: Second Draft**

Otto presented a one-pager for sharing information about HUF, featuring a graphic to enhance visual appeal. The plan includes a website linked to a QR code, connecting users to both our website and the United Way ALICE report. In response to feedback, Nazbi recommended replacing the term "recommendation" with a stronger call to action. Additionally, Nic Hessing suggested incorporating specifics, possibly in the form of a white paper or dedicated section.

Upon discussion and questions regarding point number one on the Health section that addressed HUF's appropriation request, it was decided that it was best to separate the appropriations request info from the policy agenda. HUF will now work on two separate documents, similar to what was done last year.

To refine the document further, Felipe will seek feedback from Ashley Boxer and Robby Holroyd for the second draft. Simultaneously, Otto will collaborate with the Marketing department on a secondary document, with the aim of finalizing and voting on it at the November meeting.

**November Meeting Change:**

The options for scheduling were narrowed down to either Friday, November 3rd, or Thursday, November 9th.

The Committee decided to meet on Friday, November 3rd.

**Adjourn**

At 10am

**Next Meeting: Friday, November 3<sup>rd</sup> @ 9am**

**Hispanic Unity of Florida  
Public Policy & Advocacy  
Committee Meeting  
MINUTES  
Friday, October 13, 2023**

**Present:** Carolina Cardozo, Nic Hessing, Nazbi Chowdhury, Dick Blattner, Dr. Maria Bernal, Kersti Myles, Felipe Pinzon, Felina Furer and Otto Valenzuela

**Excused:** Dr. Jeff Nasse and Maggie Zalamea

**Absent:** Megan Turetsky and Robby Holroyd

**Roll Call**

Began at 9:00 AM

**Approve September 2023 Minutes** — Presented by Carolina Cardozo

**Motion**

**Nazbi Chowdhury moved to approve the September 2023 minutes. Kersti Myles gave a second. Motion passed.**

**HUF's PP&A Activities Update**— Presented by Otto Valenzuela

Throughout Hispanic Heritage Month, which spans from September 15th to October 15th, HUF has been actively engaged in celebratory activities; HUF is informally extending its celebration through October with more activities. On September 28th, Broward County Administrator Monica Cepero was honored with a recognition from HUF as the first Hispanic County Administrator during a small event at HUF where she also read to Unity4Kids. Several elected officials were in attendance and was used to highlight Hispanic Heritage month at HUF.

Representative Hillary Cassel visited Unity4Kids to read to the kids where she received a recognition for her work on HUF's 2024 Appropriations Request. Additionally, she witnessed a cooking demonstration for our Te Ayudo program.

Looking ahead, HUF will hold its 10<sup>th</sup> annual Entrepreneur Summit on October 20th at NSU. This event is open to the public and free, and everyone is encouraged to share information within their network.

In committee news, Otto shared that Dan Schevis has stepped down from both the HUF's PP&A committee and the HUF Board of Directors. His departure was acknowledged with well wishes and gratitude for his many years of dedicated service.

**Appropriations Request Update:**

The 2024 request is strategically centered on HUF's HEAL mental health program and the Center for Working Families (workforce development), emphasizing the crucial link between mental wellness and a productive workforce. The House sponsor for our request is Rep. Griff Griffiths, and Senator Lauren Book will once again lend her sponsorship to our bill, showcasing bipartisan support. Incoming House Speaker Danny Perez helped secure the support of Rep. Griffiths who is from the Panama City area but despite the distance from South Florida has pledged support for HUF. Otto shared key dates to enhance the success of our appropriation request.

Carolina Cardozo proposed the idea of inviting Rep. Griff Griffiths to HUF to witness our programs in action, and there's a hope to facilitate a meeting with a client during the visit.

There is an invitation for others to join Otto at Broward Days in January, as in years past. HUF also plans on bringing the Director of the HEAL program, Dr. Maritza Torres to Tallahassee to speak on the program directly with elected officials.

**HUF Strategic Planning**

The top three suggestions, which emerged from discussions at the HUF board retreat held last month, have paved the way for the next strategic steps over the next three-five years. The focus will be on increasing HUF's visibility within the community, facilitating discussions on PP&A matters with corporate partners and HUF client families, establishing HUF's leadership development program, and crafting an engagement plan for staff, committee members, and clients. A final report on these initiatives will be presented to the board by December.

In response to a query from Commissioner Dick Blattner, Otto will explore the possibility of having the Citizenship program attendees host their swear-in ceremony at City Hall in Hollywood.

**HUF 2024 Public Policy Agenda: Second Draft**

Otto presented a one-pager for sharing information about HUF, featuring a graphic to enhance visual appeal. The plan includes a website linked to a QR code, connecting users to both our website and the United Way ALICE report. In response to feedback, Nazbi recommended replacing the term "recommendation" with a stronger call to action. Additionally, Nic Hessing suggested incorporating specifics, possibly in the form of a white paper or dedicated section.

Upon discussion and questions regarding point number one on the Health section that addressed HUF's appropriation request, it was decided that it was best to separate the appropriations request info from the policy agenda. HUF will now work on two separate documents, similar to what was done last year.

To refine the document further, Felipe will seek feedback from Ashley Boxer and Robby Holroyd for the second draft. Simultaneously, Otto will collaborate with the Marketing department on a secondary document, with the aim of finalizing and voting on it at the November meeting.

**November Meeting Change:**

The options for scheduling were narrowed down to either Friday, November 3rd, or Thursday, November 9th.

The Committee decided to meet on Friday, November 3rd.

**Adjourn**

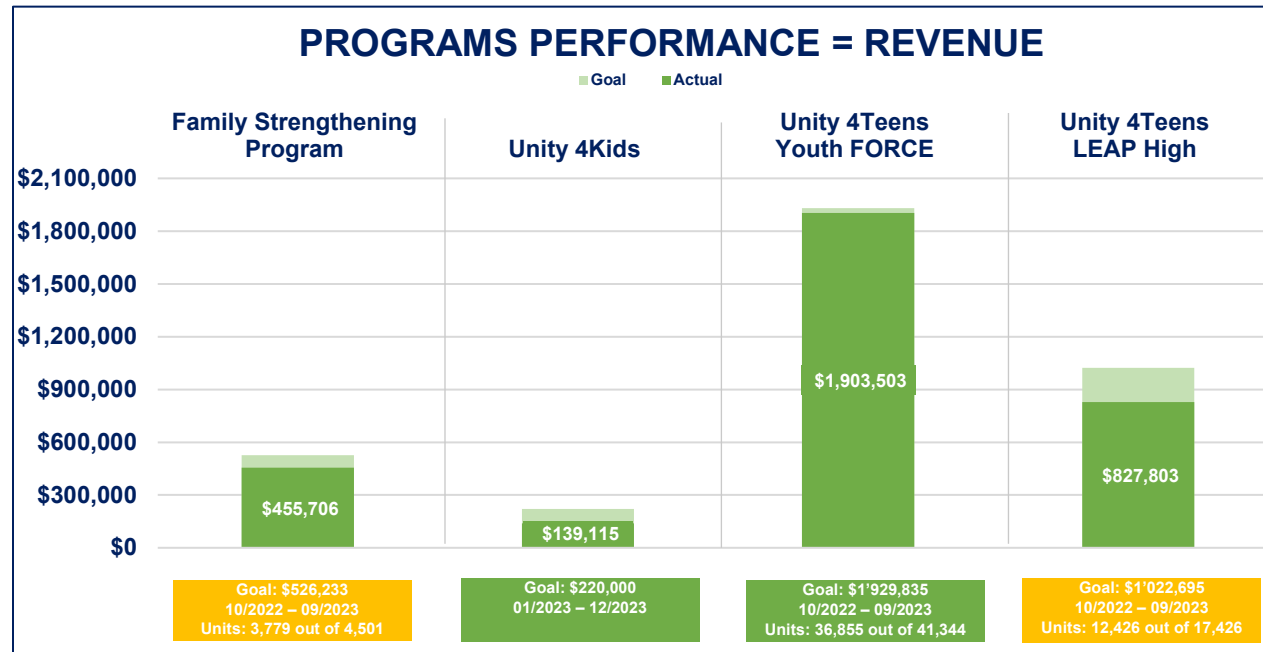
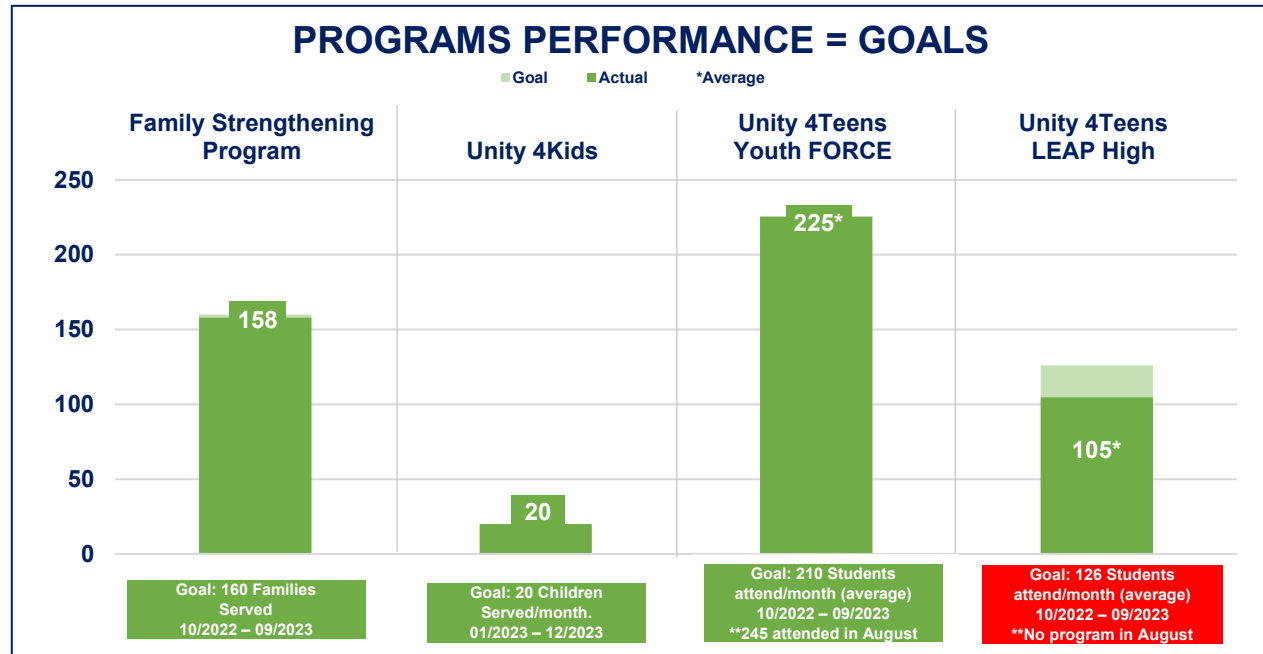
At 10am

**Next Meeting: Friday, November 3<sup>rd</sup> @ 9am**



Empowering a  
New Generation  
of Americans

# EDUCATION AUGUST 2023



Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal

\*Unity 4Teens Program Performance Goals are based on the average students that attend daily.





Empowering a New Generation of Americans

# ECONOMIC DEVELOPMENT AUGUST 2023

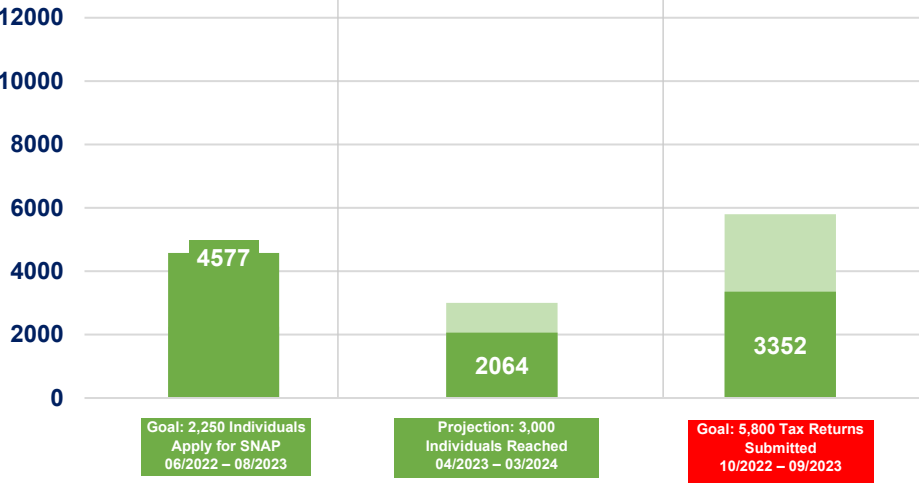
## PROGRAMS PERFORMANCE = GOALS

■ Goal ■ Actual

Comprando Rico y Sano

Health Literacy

VITA



## PROGRAMS PERFORMANCE = GOALS

■ Goal ■ Actual

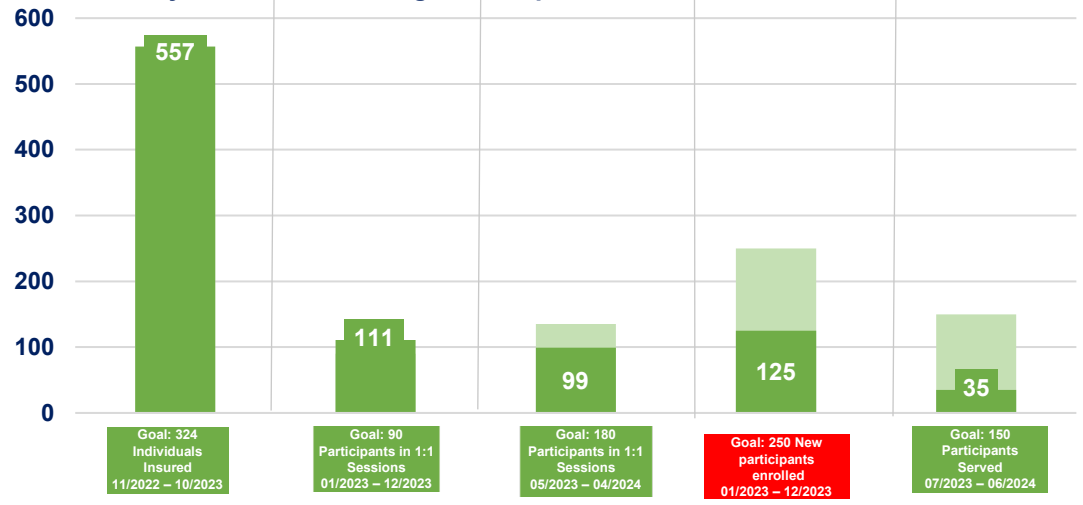
Te Ayudo

Housing

Financial Capabilities

CWF

HEAL

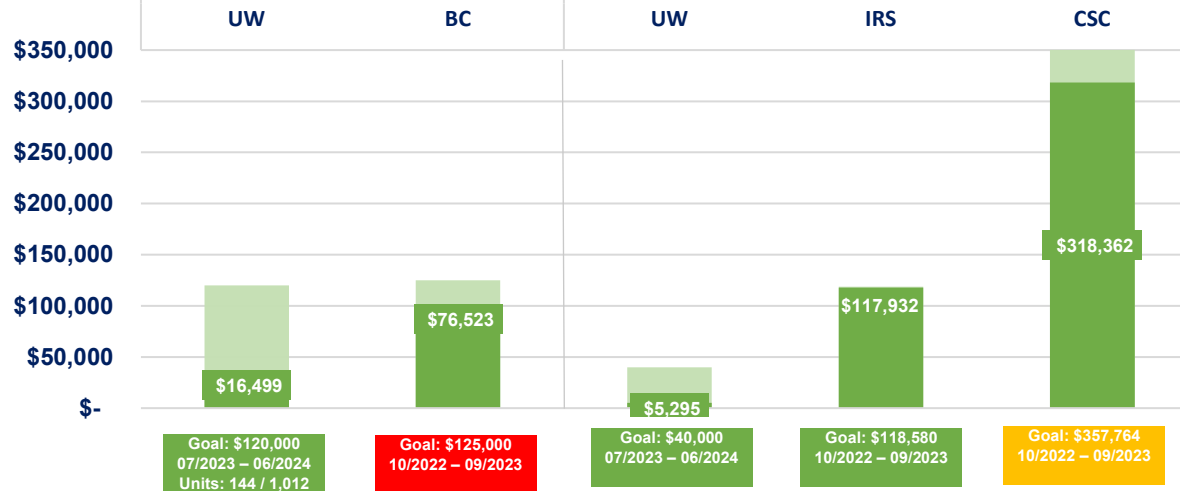


## PROGRAMS PERFORMANCE = REVENUE

■ Goal ■ Actual

CWF

VITA



Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

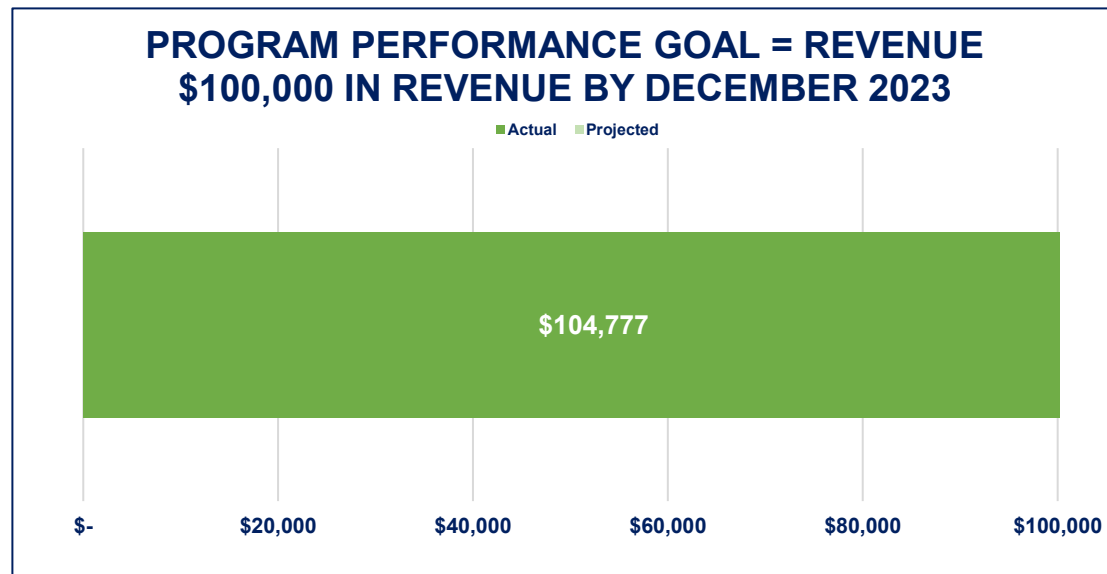
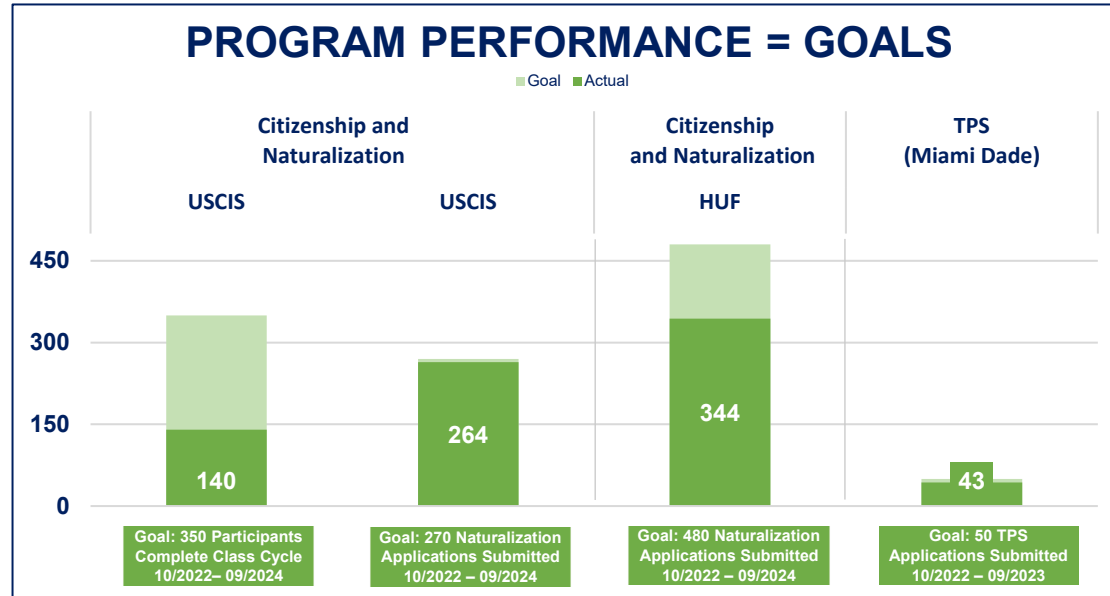
Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal



Empowering a New Generation of Americans

# CIVIC ENGAGEMENT AUGUST 2023

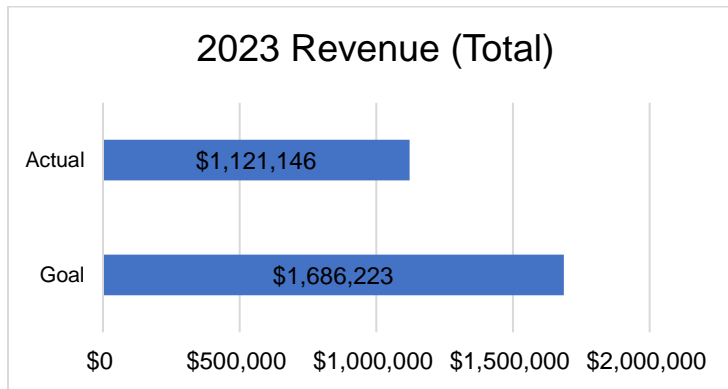


Based on current results and if future projections are met:

On track to meet goals/projections > 95% of the goal

Close to being on track to meet goals/projections 85% > 94% of the goal

Not on track to meet goals/projections <85% of the goal



### Breakdown of Revenue

Unrestricted	Goal	Actual	Variance
Annual Campaign	\$14,000	\$4,860	(\$9,140)
Circle of Friends	\$50,000	\$42,356	(\$7,644)
Corporate	\$310,000	\$126,907	(\$183,093)
Events	\$80,000	\$10,000	(\$70,000)
Major Gifts	\$70,000	\$37,000	(\$33,000)
Major Gifts (MY)	\$35,000	\$0	(\$35,000)
Miscellaneous	\$1,000	\$1,232	\$232
<b>UNR Total</b>	<b>\$560,000</b>	<b>\$222,356</b>	<b>(\$337,644)</b>
<b>Temporarily Restricted</b>	<b>\$1,126,223</b>	<b>\$898,791</b>	<b>(\$227,432)</b>
<b>TR Total</b>	<b>\$1,126,223</b>	<b>\$898,791</b>	<b>(\$227,432)</b>
<b>GRAND TOTAL</b>	<b>\$1,686,223</b>	<b>\$1,121,146</b>	<b>(\$565,077)</b>

### Other Revenue

Secured for Other FY	2024	2025	2026
<b>Total</b>	\$1,254,834 <sup>1</sup>	\$307,500 <sup>2</sup>	\$33,333 <sup>3</sup>

Miniaci Match	Goal	Actual	Variance
<b>Total</b>	\$50,000	\$11,500	\$(39,500.00)

Rose Miniaci Family Fund – Match Grant Challenge (Year 1 = July 1, 2023 – June 30, 2024, Goal = \$50,000)

Emergency Assistance	Actual
<b>Total</b>	<b>\$50,000</b>

Financial assistance for clients and staff impacted by April 2023 rainfall & flood.

<sup>1</sup> Children’s Services Council of Broward (FSP), Community Foundation of Broward (CWF), Urban Institute (AHL), Tate Family (U4K), and Citi Foundation (CRYS)

<sup>2</sup> Community Foundation of Broward (CWF), Tate Family (U4K), and Citi Foundation (CRYS)

<sup>3</sup> Community Foundation of Broward (CWF)

Grant Pipeline (Conservative)			Grant Pipeline (Aggressive)		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Requests	Value of Requests
9/2023	2	\$ 35,000	11/2023	2	\$ 170,000
12/2023	1	\$ 50,000	12/2023	1	\$ 15,000
10/2023	7	\$ 96,688	9/2023	2	\$ 35,000
<b>Grand Total</b>	<b>10</b>	<b>\$ 181,688</b>	<b>Grand Total</b>	<b>5</b>	<b>\$ 220,000</b>

Grants Submitted			Grants Awarded		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Awards	Value of Awards
12/2022	1	\$ 25,000	12/2022	2	\$15,000
2/2023	1	\$ 25,000	1/2023	3	\$83,167
5/2023	6	\$ 575,753	2/2023	6	\$218,395
6/2023	1	\$ 200,000	3/2023	2	\$240,030
7/2023	4	\$ 269,936	6/2023	3	\$60,000
8/2023	7	\$ 1,223,158	4/2023	5	\$204,167
<b>Grand Total</b>	<b>20</b>	<b>\$ 2,318,847</b>	7/2023	1	\$15,000
			8/2023	2	\$78,750
			<b>Grand Total</b>	<b>24</b>	<b>\$914,508</b>

Pitch Pipeline			Pitches Awarded		
Month/Year	# of Requests	Value of Requests	Month/Year	# of Awards	Value of Awards
9/2023	1	\$ 100,000	1/2023	1	\$ 10,000
<b>Grand Total</b>	<b>1</b>	<b>\$ 100,000</b>	12/2022	1	\$ 9,800
			3/2023	13	\$ 10,835
			4/2023	2	\$ 34,000
			7/2023	1	\$ 50,000
			8/2023	1	\$ 10,000
			<b>Grand Total</b>	<b>19</b>	<b>\$ 124,635</b>

Pitches Submitted		
Month/Year	# of Requests	Value of Requests
3/2023	6	\$ 6,000
5/2023	1	\$ 200,000
8/2023	3	\$ 204,880
<b>Grand Total</b>	<b>10</b>	<b>\$ 410,880</b>

## NOTE

- Walmart Note - \$125K UNR pitched in March; \$1,000 awarded to date (\$500 - 03/27/2023; \$500 - 07/06/2023). Submitted amount does not appear in pipeline since partially awarded.