

July 31, 2017

**Memorandum of Understanding
between
Rollins College Edyth Bush Institute
for Philanthropy & Nonprofit Leadership
and
The Able Trust**

The Rollins College Edyth Bush Institute for Philanthropy & Nonprofit Leadership ('EBI') will work with the Able Trust ('Able Trust') to provide a four training sessions ('*Leadership for Innovation*'; '*Program Evaluation Basics*'; '*Volunteer Management*'; and, '*Program Marketing*').

1. **Attendees:** Approximately 50 individuals throughout the day
2. **Location:**
Saddlebrook Resort
5700 Saddlebrook Way
Wesley Chapel, Florida 33543
3. **Date and Time:** Thursday, September 7, 2017; 8:30am to 5:00pm
4. **Instructors:**



Dr. Bahíyyah Maroon, Ph.D. is the Senior Director of Research and Design at Eripio Institute. She oversees funding development and evaluation services delivered to non-profits, municipalities, and school districts throughout the United States. Dr. Maroon's grant-writing and program design work has brought over 12 Million dollars in funding to non-profit organizations and educational institutions throughout the United States. Her experience includes initiatives focused on workforce development, green economic development, education, and civic arts. She specializes in promoting partnerships between institutions, businesses, and diverse constituencies that lead to robust programs with sustainable funding sources. Organizations she has worked with include among others, the Gulfcoast Legal Services, the Holocaust Memorial Resource & Education Center of Florida, Intel Corporation, and Institute for the Future. Dr. Maroon holds an M.A. and Ph.D. in Social Science from the University of California, Santa Cruz.



Andrea Hendry is an instructor for the Certificate in Volunteer Management program at Rollins College Edyth Bush Institute for Philanthropy & Nonprofit Leadership. Andrea developed and managed the City of Orlando's Cities of Service projects known as Orlando Cares. These include five unique and varied educational volunteer-led programs. She

has worked in volunteer management throughout the Central Florida community since 2006. She managed volunteers for Give Kids the World Village and lead the volunteer activities for the Heart of Florida United Way. Andrea specializes in "volun-tourism" and excels at engaging corporate volunteers and donors. She also has served as an aid to a US congressman assisting nonprofit organizations in accessing government funding. Previously, Andrea served as president of the Council of Volunteer Managers of Central Florida. She is a graduate of Rollins College.



Carolyn Capern is the co-founder and Digital Storyteller at CT Social, a digital marketing agency offering website development and social marketing services for corporate, government, and nonprofit organizations across the United States.

The daughter of a librarian and an IBM consultant, Carolyn developed an early appreciation for the parallel worlds of storytelling and technology. Since 2013, Carolyn has served as social media strategist for the Rethink Homelessness campaign of the Central Florida Commission on Homelessness, helping to drive the advocacy effort for the fight to end homelessness in across the region.

Carolyn has been published by the Orlando Business Journal, the International Association of Business Communicators, HostDime, Central Florida Top 5, and more. In 2015, Carolyn co-authored *Finding Their Way Home: Rethinking Homelessness for Veterans in Central Florida*, a report released by trisect and the Central Florida Commission on Homelessness to announce a historic reduction in unhoused Veterans.



Greg Trujillo is the co-founder and Chief Marketing Technologist at CT Social, a digital marketing agency offering website development and social marketing services for corporate, government, and nonprofit organizations across the United States.

Tech-minded from his early years, Greg built his first computer at age 10 and is trained as a Computer Engineer. Since co-founding CT Social, Greg has developed responsive interactive websites for a wide variety of organizations, and serves as social media strategist and analyst for the Rethink Homelessness campaign and other digital marketing campaigns.

Greg served as the Interactive Project Manager at GoConvergence Digital in the summer of 2012. In his role there, Greg oversaw and developed interactive projects for major clients including BJC Hospitals, Cirrus Aircraft, and the USS Intrepid museum in New York City.

5. Training:

Leadership for Innovation - Half Day (Dr. Bahiyyah Maroon)

Workshop Description: Attendees will gain inspiring insights to apply principles of leadership to promote innovation and programmatic success.

Learning Outcomes:

- Gain an understanding of the key principles of high impact leadership;
- Learn about applying leadership principles to establish and promote innovative programming;
- Understand how to expand critical thinking and solution creation skills in others with attention to cognitive and physical diversity.

Program Evaluation Basics – 2 hour (Dr. Bahiyyah Maroon)

Workshop Description: Attendees will learn the importance of program evaluation utilizing data to drive new ideas and create enhanced financial opportunity.

Learning Outcomes:

- Expand participants' knowledge of evaluation and its importance;
- Gain an understanding of evaluation fundamentals & planning;
- Increase awareness of how to utilize evaluation data for improved programming, policy impact and greater funding opportunities.

Volunteer Management – 2 hour (Andrea Hendry)

Workshop Description with Learning Outcomes: For so many nonprofit, government and educational organizations, engaging volunteers throughout an organization is what makes everything possible! This jam-packed two-hour session will give participants an overview of operational best practices for agency and advisory groups who manage and work with volunteers. We will discuss how to allocate volunteer time for the good of an organization. Discussion will include best practices for establishing a volunteer position description and how this tool can be the most powerful recruitment tool for an organization. We will review appropriate volunteer policies and procedures, on-boarding, orientation and job-specific training. Finally, we will cover how technology plays an impact on volunteerism.

Program Marketing – 2 hour (Carolyn Capern and Greg Trujillo)

Workshop Description: Want to inspire supporters? Or raise awareness about your programs? Successful marketing is based on discipline, grasp of communications and a keen understanding of what resonates with audiences. Statements like “Nobody knows who we are or what we do” and “Why don’t people understand how good we are?” indicate problems with effective marketing. A great marketing plan can help you stand out from other programs and stand out amid day-to-day life in the noisy modern world (both online and offline). This workshop will explore some of the essential factors in modern marketing.

Learning Outcomes: Participants completing the workshop will be able to:

- Understand how to get better acquainted with their audience and how to better resonate with them;
 - Craft a meaningful message and use attention-grabbing tactics to engage supporters;
 - Consider the value of various means of communication for an organization and identify the ones that work best for their group;
 - Evaluate the importance of customer experience to their brand and identify opportunities for improvement.
6. **Confidentiality:** EBI recognizes and acknowledges that Able Trust has developed, and continues to develop and use, commercially valuable proprietary technical and non-technical information which is vital to the success of the organization's mission. Furthermore, EBI recognizes and acknowledges that Able Trust utilizes trade secrets in formulating, promoting, financing, and marketing its programs, which are entitled to protection from disclosure.

EBI shall hold, and shall cause the Instructor to hold, in strict confidence forever, and shall not disclose to any third party (except to authorized persons in the course of this agreement) or use in any way (other than in connection with EBI's performances hereunder) any information of a confidential nature not generally available to the public which becomes known to EBI in the scope of EBI's engagement with Amerigroup relating to the business operations of the organization, or any private warrior information or data acquired by EBI.

7. **Insurance:** Both EBI and Able Trust shall maintain comprehensive general liability insurance in the amount of no less than one million dollars (\$1,000,000.00) per occurrence and two million dollars (\$2,000,000.00) in the aggregate to protect itself against any claims arising from any activities conducted under this agreement.
8. **Indemnification:** EBI and Able Trust shall indemnify, hold harmless, and defend each other and its directors, officers, employees, agents, and affiliates from and against all claims, demands, actions, suits, damages, liabilities, losses, settlements, judgments, costs, and expenses (including, but not limited to, reasonable attorney's fees and costs), whether or not involving a third party claim, which arise out of or relate to EBI or Able Trust negligence or willful misconduct and to EBI or Able Trust breach of this agreement.
9. **Third Party Intellectual Property:** EBI agrees that it is solely responsible for obtaining any licenses, permissions, consents, or releases necessary to use any EBI trademarks or any other trademark, service mark, trade name, trade dress, slogan, photograph, writing, artwork, name, voice, likeness, or other intellectual property (collectively, "Third Party Intellectual Property") that may be used by EBI in association with the Training.

10. **Publicity and Publications:** No publicity releases (including news releases and advertising or solicitation materials) or other public statements relating to this agreement or the services to be performed hereunder shall be issued or made by EBI without the prior written approval of Able Trust. No technical paper, article, or documentary, or oral or visual presentation, by EBI concerning any aspect of Trust business shall be presented or disclosed by EBI to any person without the prior consent and approval of Able Trust. Able Trust may withhold such written approval at its sole discretion.
11. **Training Materials:** Training materials are solely owned by EBI. Upon completion of the workshop, Able Trust will not use or share the training materials for their own use or the use of others.
12. **Equipment and Other Requirements:** Upon request of the instructor(s), Able Trust shall provide an easel, flip-chart paper, and markers; and, if necessary, a projector and screen for PowerPoint and video presentations; and, access to the internet.
13. **Catering:** All catering needs shall be arranged and provided by Able Trust.
14. **Compensation:**

The Able Trust agrees to pay an honorarium to EBI in the amount of one thousand, three hundred, seventy-five dollars and 00/100 cents, for a half day training (\$1,375). In addition, the Able Trust will pay EBI a fee of five hundred dollars and 00/100 cents, for each of three two-hour sessions (\$500).

The total compensation for four sessions is two thousand, eight hundred, seventy-five dollars and 00/100 cents (\$2,875). This compensation includes all pre-work, facilitation, instruction and materials.

Dr. Maroon will receive one night of accommodation at the conference hotel rate as negotiated by The Able Trust. She will also receive a meal allowance not to exceed one hundred dollars and 00/100 cents (\$100.00). Dr. Maroon is welcome to join the Able Trust at dinner on November 6 and lunch on November 7. Ms. Hendry, Ms. Capern and Mr. Trujillo will each receive a meal allowance not to exceed fifty dollars and 00/100 cents (\$50.00). They are welcome to join The Able Trust at lunch on November 7. All meal reimbursement is subject to the delivery of original receipts to The Able Trust.

Dr. Maroon, Ms. Hendry, Ms. Capern and Mr. Trujillo will be compensated for actual round trip mileage to the event from their base location in Orange County, Florida. Reimbursement will be at the current IRS rate (.535 cents per mile). All payment is due to the Edyth Bush Institute within 30 days from the receipt of an invoice, which will be delivered after the conference.

Checks are payable to Rollins College and mailed to:

Rollins College
Edyth Bush Institute
1000 Holt Avenue, #2755
Winter Park, FL 32789

15. **Cancellation:** Either party may cancel the Training without obligation upon written notice to the other five (5) days prior to the date of the session. If cancelled by Able Trust after the agreed upon date, Able Trust must reimburse EBI for any expenses incurred.

If you have any questions, please contact:

Jim Moody, Custom Program Manager
407-975-6417 or jmoody@rollins.edu

Margaret S. Linnane

Margaret S. Linnane
Executive Director
Rollins College Edyth Bush Institute for
Philanthropy & Nonprofit Leadership

July 31, 2017

Date

Suzanne F. Nant

Customer Name: THE ABLE TRUST
Customer Title: PRESIDENT/CEO

8/8/17

Date