



## MEMORANDUM OF AGREEMENT

24-004

BETWEEN

THE ABLE TRUST AND

POLICYWORKS

This MEMORANDUM OF AGREEMENT (“Agreement”), by and between The Able Trust (“Foundation”) and PolicyWorks (“Organization”), each individually a “Party” and collectively “the Parties”.

IT IS THEREFORE agreed between The Able Trust and PolicyWorks:

**I. Purpose:**

To fund the Arts to Competitive Integrated Employment (ArtCIE) program in **Florida**, in the amount of Five Hundred Ninety-Four Thousand Three Hundred Forty-Three dollars (\$594,343.00) Funds disbursed are contingent upon the continuing availability of legislative funding.

**II. Scope of Work**

**A. Project Background**

The Florida Arts to Competitive Integrated Employment (ArtCIE) Project’s primary goals are to increase the number of adults with disabilities transitioning from subminimum wage employment to competitive integrated employment and the percentage of students and youth with disabilities contemplating subminimum wage employment that enter competitive integrated employment. ArtCIE will offer opportunities to at least 1,000 individuals with disabilities; create a dual customer career exploration model with innovations in peer mentoring, work experience, virtual reality modules, and business engagement; and provide training for 14(c) certificate holders, individuals, families, school personnel and employers. ArtCIE will expand partnerships with Florida’s WIOA core partners, Employment First partners, the University of South Florida, Kennedy Center’s VSA Arts, Griffin-Hammis, The Able Trust, PolicyWorks, The Arc of Florida Chapters, ServiceSource, and the Institute for Community Inclusion.

**B. Project Description**

The Organization shall develop and coordinate peer mentoring for adults; and develop guides, materials, and resources for new services. The Organization will specifically support the development and delivery of a replicable, sustainable and expandable model supporting the

provision of peer mentoring support to persons transitioning from contemplating SW (C-SW) employment.

In year 2, the Organization will focus on the plan, outline and development of training and direct service provision support for peer mentors and provide direct support and training including access to training and tools and community of practice support at the three demonstration model sites. The Organization will work throughout the first year to ensure that they achieve the following objectives.

1. Develop timeline and scope of deliverables FL ArtCIE Edition training plan and program protocol for demonstration sites for the direct provision of peer mentoring services as outlined in the FL ArtCIE program work plan.
2. Participate in FL ArtCIE activities as directed for project planning and implementation activities supporting the provision of peer mentoring services to persons with disabilities in SW or C-SW employment in the arts.
3. Support, participate and coordinate with the FL ArtCIE Project Team through team meetings and project activities as required to support the successful design and implementation of the FL ArtCIE program objectives.
4. Modify, produce and provide the **Peer Mentoring Works (PMW) Learn CTR Modules & Tool Suite** resources including the **PMW Field Guide Mobile App (FL ArtCIE Edition)** and **PMW YouTube Channel (FL ArtCIE Playlist)** to support FL ArtCIE project and program scope of work activities.
5. Participate, produce and provide documentation and reporting deliverables to maintain program progress and meet FL ArtCIE project requirements.

By focusing on these objectives during the design phase in year 2, the Organization will lay a strong foundation for the successful implementation of the peer mentoring program, supporting individuals transitioning from SW or C-SW employment.

### **C. ArtCIE Program Outcomes (Year 2)**

1. Program Evaluation: Coordinate and collaborate with project partners and the project evaluators to develop processes for reporting program outcomes.
2. Program Evaluation: Finalize the model for implementation in the pilot sites and provide feedback on the model fidelity. Design strategies to recruit participants and facilitate application and eligibility for VR services, including those who are unserved and underserved. Additionally, provide feedback on tools that will be used to assess model fidelity.
3. Program Evaluation: Provide feedback on the ICI developed satisfaction survey for ArtCIE participants and businesses.
4. Program Evaluation: Participate in training on model service delivery and how to participate in data collection per the evaluation requirements. The training will be recorded and able to be accessed on demand. Complete pre- and post-training assessments.
5. Program Evaluation: Support VR to respond to requests from RSA and/or Mathematica regarding the national level evaluation.

6. Advisory Workgroups: Establish and convene the advisory workgroups to consult on implementation and evaluation of ArtCIE.
7. Individualized Services: Participate with project partners on identifying how ArtCIE program participants will be provided information and support services to assist in exercising informed choice regarding CIE options, including but not limited to participation in on-the-job training, job shadowing, and internships, to ensure that opportunities are identified based on ArtCIE program participants' choices and experiences toward achieving CIE outcomes.
8. Organization Engagement: Participate in Steering Group consisting of all MOU partners and relevant stakeholders to meet on a quarterly basis.
9. Organization Engagement: Participate in Partner Working Group consisting of key personnel from core partners to meet on an annual basis.
10. Outreach to Unserved and Underserved Individuals with Disabilities: Collaborate with partners and stakeholders to participate in outreach to unserved and underserved individuals with disabilities and their families.
11. Participant Outreach and Training: Collaborate and provide feedback on outreach and training to ArtCIE program participants and, as appropriate, their parents or guardians to address social inclusion, supported decision-making and alternatives to guardianship, fair wages and hours, skills development, safe and healthy workplaces, and supports necessary for success ( e.g., transportation, financial planning).

### **III. Reporting Requirements:**

- A. The total payment shall be paid as scheduled progress payments in accordance with Section IV, below, which prescribes the amount of each payment, the specified Deliverable(s) that must be received and approved prior to each payment, and the projected payment date.
- B. The Organization is required to report outcomes at regular intervals during the term of the Contract. Failure to provide progress reports as requested will result in a delay of future payments, and may result in a reduction of the contract award.
- C. A monthly project status report shall be submitted by the Organization to the Foundation ten (10) calendar days after the end of each month.
- D. Project reports to document comprehensive project activities and program measures and finance reports shall be submitted by the Organization to the Foundation on a quarterly basis. Both reports are due by October 10, 2023, January 10, 2024, April 10, 2024, and July 10, 2024.
- E. Supplemental materials with all quarterly, fiscal, and programmatic reports such as copies of receipts, invoices, salary paid, photographs and other listed materials.
- F. Financial Consequences: Noncompliance of the above reporting requirements will result in the following financial consequences:
  1. \$250 for each report and requirement not met timely.
  2. Invoices will not be accepted until the reporting requirement is met.
- G. The Organization shall submit monthly/quarterly project reports, invoices, and all required documentation into the Foundation's online grants system. Further instruction on invoicing and

reporting, along with a copy of the invoice template, will be provided upon execution of the Agreement.

#### **IV. Terms:**

- A. This Agreement shall become effective upon execution by both parties. The agreement will continue to be in effect for the period identified in Section VI. below unless terminated by either party upon sixty (60) days written notice to the other party at the stated address below. Further modifications, changes or amendments to this Agreement may be made by the Foundation and presented in writing and signed by the parties hereto.
- B. Compliance - The Foundation may perform on-site inspections of the project anytime during regular business hours or scheduled functions. The on-site visit may be completed by a board or staff member of the Foundation, or any representative designated by the Foundation. The Foundation may conduct an audit of the project at any time during or after the completion of the project described in this Contract. Such audit shall include, but is not limited to financial records relating to the project funded and time/work completed on the project. Audits may include interviews with recipients of services.

The Organization understands that s. 20.055, F.S., requires every contractor and subcontractor to cooperate with the Inspector General of the funding agency in any investigation, audit, inspection, review, or hearing; and the Organization shall comply with this requirement. The Organization shall grant access to all records pertaining to the Contract to the Department of Education's Inspector General, General Counsel and other agency representatives, the State Auditor General, the Office of Program Policy and Government Accountability, and the Chief Financial Officer.

- C. In the event of a breach of any promise, representation, warranty, or agreement made by Organization under this Contract, or in the event that the Foundation believes that the Organization has not attempted to or cannot or will not complete the project described in this Contract, the Foundation shall be released from any and all obligation to provide the Funds or any undelivered portion thereof to the Organization. Upon any such occurrence, the Foundation shall be entitled to the immediate delivery of any unused funds by the Organization, as well as to the delivery of any personal property purchased with the funds by the Organization and shall be entitled to pursue any other legal remedy available to it, resulting from the Organization's breach of this Contract.
- D. If any provision of this Agreement is amended by the parties or held to be void or unenforceable in a court of competent jurisdiction, all other provisions shall remain in full force and effect.
- E. The Organization shall not use any funds for expenses incurred before the date of execution nor shall it encumber any liability related directly to the project being funded prior to the initial disbursement of funds.
- F. Governing Statutory and Administrative Requirements. The statutes and administrative rules or regulations governing this project include, but are not limited to, the following:
- State: Section 215.97, Florida Statutes, (Florida Single Audit Act); Chapters 216, 287 and 413 (Part II), Florida Statutes; Section 112.061, Florida Statutes; the State of Florida, Department of Financial

Services, Reference Guide to State Expenditures; and any other state laws that may be applicable.

- Federal: The Rehabilitation Act of 1973, as amended, and Public Law 108-364. Other applicable regulations include the Education Department General Administration Regulations (EDGAR); the Federal State Plan; Title 34, Code of Federal Regulations Part 345; and 2 CFR Part 200; other federal laws as may be applicable.

- G. The Organization further warrants that the Organization shall not disclose to any third party, without the express, prior, written approval of the Foundation, any personally identifiable information about any student. This applies to information which came from any record or report of a Florida public education institution or from any education record which is subject to the Family Educational Rights and Privacy Act, 20 U.S.C. Section 1232g. The terms “record a report” and “student” shall have the meanings prescribed in s. 1002.22(2)(c) and (d), F.S. The term “educational record” shall have the meaning prescribed in 20 U.S.C. Section 1232g(a)(4).
- H. In the event that the Governor and Cabinet are required to impose a mandatory reserve on appropriations, the Foundation shall amend this Contract to place in reserve the amount determined by the Department of Education to be necessary because of the mandatory reserve. Such amendments may provide for adjustments in the Deliverable products and services as may be necessary.
- I. Pursuant to s. 216.347, F.S., no funds awarded under this Contract may be used for the purpose of lobbying the Legislature, the judicial branch, or a state agency.
- J. This Contract shall be governed by the laws of the State of Florida, and venue for purposes of any action brought to enforce or construe the Contract shall lie in Leon County, Florida.

**V. Other Contract Conditions**

- A. The Organization acknowledges that the Organization is not an agent or employee of the Foundation. The Organization agrees to indemnify and hold harmless the Foundation, its Board members, and employees from any and all cost, loss, damage or expense (including reasonable attorney’s fees) which may occur by virtue of the Organization’s implementation of the proposed project to the extent authorized by law and without waving any rights under the State of Florida Sovereign Immunity Statute, Chapter 768 F.S.
- B. The Organization will acknowledge existing Foundation grants and/or those that will operate concurrently to this grant prior to the execution of this Contract.
- C. In fulfilling its obligations under this Contract and Chapter 119, F.S., Organization must comply with the requirements outlined in s. 119.0701, F.S. If Organization fails to comply with a public records request pursuant to Chapter 119, F.S., the Foundation may take any action under this Contract necessary to ensure compliance with Florida’s public records laws, including, but not limited to, demanding compliance with a public records request, seeking indemnification from Organization regarding an action brought to enforce a public records request sent to Organization, or terminating the Contract. Pursuant to s. 119.0701, F.S., Organization must:
  - 1. Keep and maintain public records required by the Foundation to perform the service;

2. Upon request from the Foundation's custodian of public records, provide the Foundation with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in chapter 119, F.S., or as otherwise provided by law;
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Organization does not transfer the records to the Foundation; and
4. Upon completion of the Contract, transfer, at no cost, to the Foundation all public records in possession of the Organization or keep and maintain public records required by the Foundation to perform the service. If the Organization transfers all public records to the Foundation upon completion of the Contract, the Organization shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Organization keeps and maintains public records upon completion of the Contract, the Organization shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the Foundation, upon request from the Foundation's custodian of public records, in a format that is compatible with the information technology systems of the Foundation.

**IF THE ORGANIZATION HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE ORGANIZATION'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 850-224-4493 & [info@abletrust.org](mailto:info@abletrust.org), The Able Trust, Attn: Contract Custodian 1709 Hermitage Blvd., Suite 100, Tallahassee, FL 32308.**

- D. Intellectual property is subject to following additional provisions:
1. Anything by whatsoever designation it may be known, that is produced by, or developed in connection with, this Contract shall become the exclusive property of the of the State of Florida and may be copyrighted, patented, or otherwise restricted as provided by Florida or federal law. Neither the Organization nor any individual employed under this Contract shall have any proprietary interest in the product.
  2. With respect to each Deliverable that constitutes a work of authorship within the subject matter and scope of U.S. Copyright Law, 17 U.S.C. Sections 102-105, such work shall be a "work for hire" as defined in 17 U.S.C. Section 101 and all copyrights subsisting in such work for hire shall be owned exclusively by the Department of Education pursuant to s. 1006.39, F.S., on behalf the State of Florida.
  3. In the event it is determined as a matter of law that any such work is not a "work for hire", Organization shall immediately assign to the Department of Education all copyrights subsisting therein for the consideration set forth in the Contract and with no additional compensation.
  4. The foregoing shall not apply to any preexisting software, or other work of authorship used by Organization, to create a Deliverable but which exists as a work independently of the Deliverable, unless the preexisting software or work was developed by Organization pursuant to a previous Contract with the Department of Education or a purchase by the Department of Education under a State Term Contract.
  5. The Department of Education shall have full and complete ownership of all software developed pursuant to the Contract including without limitation:
    - a. The written source code;

- b. The source code files;
  - c. The executable code;
  - d. The executable code files;
  - e. The data dictionary;
  - f. The data flow diagram;
  - g. The work flow diagram;
  - h. The entity relationship diagram; and
  - i. All other documentation needed to enable the Department of Education to support, recreate, revise, repair, or otherwise make use of the software.
- E. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017, F.S., for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.
- F. The employment of unauthorized aliens by any contractor is considered a violation of Section 274A(e) of the Immigration and Nationality Act. If the Organization knowingly employs unauthorized aliens, such violation shall be cause for unilateral cancellation of the contract. In addition, pursuant to State of Florida Executive Order No. 11-116, Organization shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment of all new employees hired by the Organization during the contract term. Also, Organization shall include in related subcontracts a requirement that subcontractors performing work or providing services pursuant to the Contract utilize the E-Verify system to verify employment of all new employees hired by the subcontractor during the contract term.
- G. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion – Lower Tier Covered Transactions
- 1. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
  - 2. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal. The Foundation may cancel this contract if an attached explanation is not acceptable to the Foundation, Department of Education, or the Federal government.
- H. Publications, printed reports, videos, websites or other materials must include the following statement.
- “The contents of this (insert type of publication, e.g., book, report, film, PPT, etc.) were developed under a grant # H421D220005 from the Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and grantees should not assume endorsement by the Federal Government. (Authority: 20 U.S.C. 1221e-3 and 3474).”

**VI. Contract Service Dates:** The contract begins upon execution by both Parties and ends June 30, 2027.

**VII. Payments**

- A. Foundation agrees to provide \$594,343.00 to Organization as Agreement# 24-004 subject to the terms and conditions as stated. The Foundation shall disburse the funds to the Organization as stated below.
- B. Prior to payment, the Foundation shall accept, review, and approve completed deliverables. Payments will only be processed for deliverables that meet the minimum performance criteria as established below. Any deliverables that do not meet the minimum performance standards must be assessed applicable financial consequences.
- C. The schedule of progress payments, the Deliverable(s) required to be received and approved, and the projected payment dates are set forth below. The actual date of payment shall be governed by the receipt and approval of the Deliverable(s), not by the projected payment date which is included to assist in planning the Contract activities and managing the project. Projected dates are tied to the overall ArtCIE project work plan. The Project phase(s) and deliverable timelines are captured at quarterly intervals, during each contract performance year. Year 1 refers to October 1, 2022 - September 30, 2023; Year 2 refers to contract period Date of execution - September 30, 2024; Year 3 refers to contract period October 1, 2024 - September 30, 2025; Year 4 refers to contract period October 1, 2025 – September 30, 2026; Year 5 refers to final contract period October 1, 2026 - September 30, 2027. The agreement will be amended annually to include deliverables for Years 3-5.

**Year 2 Deliverables & Tasks**

<b>Deliverable</b>	<b>Deliverable Price</b>	<b>Performance Measure (minimum performance criteria)</b>	<b>Projected Completion Date</b>
Develop ArtCIE Peer Mentoring Training Protocol Plan and Develop Template, outline for LearnCTR Product Development Templates for at least 6 ArtCIE PMW	\$1,500	Submission and Approval of ArtCIE Peer Mentoring training protocol plan and ArtCIE training template to supplement existing PMW LearnCTR Modules for the training of Peer Mentoring providers.	Beginning Quarter 2 and continuing through Quarter 3 (January 1, 2024 - June 30, 2024)
LearnCTR Supplemental Training Modules for provision of training for Peer Mentoring Service Providers	\$500 each	Development and Provision of Module 6 content draft outlines for 6 training modules using template and draft outlines.	
	\$4,000 each	Completion and delivery of 4 of 6 final PMW LearnCTR Training Modules.	



Develop ArtCIE Plan and product template for to 2 of 4 ArtCIE ActivityGuides available to peer mentoring service providers through the PMW FieldGuide FL ArtCIE Edition.	\$1,500	Development and provision of PMW LearnCTR ARTCIE Training Protocol & Plan.	Beginning Quarter 2 and continuing through Quarter 3 (January 1, 2024 - June 30, 2024)
	\$500 each.	Provision of 2 Activity Guide Drafts Outlines	
	\$4000 each	Completion of 2 final PMW ActivityGuides and integration into PMW ToolSuite.	
Develop ArtCIE Peer Mentoring Provision MultitMedia Support to include Video Content for PMW ArtCIE Playlist. Pre-Production and Post-production of Video and Multimedia Content for PMW ArtCIE YouTube Channel.	\$1,000	Identify Subject Matter Influencers and playlist topics for Multimedia production plan. Video content draft plan aligned with project messaging objectives.	Beginning Quarter 3 and continuing through Quarter 4 - (April 1, 2024 - September 30, 2024)
	Develop Content Outline (\$1,000 each) and produce 2 instructional videos for PMW ArtCIE YouTube Playlist. (\$9,000 each)	Develop script and plain language content and produce and edit video content for YouTube channel.	
Technology support for the development of the customized PMW Field Guide (FL ArtCIE Edition) with integrated activity guides and resources	Up to \$15,000 YR1 billed at \$100/HR for technical support in the development of the PMW FieldGuide ArtCIE Edition and integrated activity guides.	Provision of Tech and Accessible support for PMW LearnCTR and ToolSuite FieldGuide with ActivityGuides.	Beginning Quarter 2 and continuing through Quarter 4 (January 1, 2024 - September 30, 2024)
Develop, plan and create training content for demonstration model sites to be delivered through on-site and web-based training workshops with integrating evaluation support and feedback	\$1,000.00	Model Site Peer Mentoring Training Plan Document with schedule.	Beginning Quarter 2 and continuing through Quarter 4 (January 1, 2024 - September 30, 2024)

loops for program enhancements.			
Unlimited License to access existing and ArtCIE Edition PMW LearnCTR Training Modules for PMC/PM Fee (Prepaid License - \$800/monthly YR 2-6)	Fee for prepaid unlimited license - \$800/monthly YR 2-6)	On-demand training to all ArtCIE project wide program partners, PMC/PM.	Beginning Quarter 3 and continuing through Quarter 4 - (April 1, 2024 - September 30, 2024)
Onsite Training Workshops with virtual support and content at 3 demonstration model site -Virtual Tech Support	(4 HR @ \$100/hour at 3 sites- \$400 each)	Training and Program Support for the delivery of Peer Mentoring.	During Quarter 3 or Quarter 4 (April 1, 2024 - September 30, 2024)
Host and deliver PM/PMC KSA Workshops - Live web-based training	(4 HR @ \$80/hour)	Monthly live webinar training workshops available to FL ArtCIE program PMC/Peer Mentors	Beginning Quarter 3-and continuing monthly through Quarter 4 - (April 1, 2024 - September 30, 2024)
In-state travel to Demonstration Model Site Locations and team meeting per proor FL ArtCIE Meetings.	\$3,000.00	Travel and attendance at ArtCIE Team Meeting (tbd) and Demo-model site visits with training agenda /Travel Report as required.	Dates to be determined

- D. Financial Consequences: In addition to financial consequences identified in Section III.F., if the Organization fails to meet and comply with the activities/deliverables established in the Agreement or to make appropriate progress on the activities and/or towards the deliverables and they are not resolved within two (2) weeks of notification, the Contract Manager shall approve a reduced payment.
1. The Foundation will withhold payment proportionate to the deficient activity or performance until the deficiency is cured.
  2. Request the Organization redo or otherwise cure the work.
  3. A financial consequence of \$500.00 shall be applied for each occurrence of non-compliance and/or lack of performance related to timeliness of quarterly activity and report submission for the ArtCIE Project.

**VIII. Insurance**

During the Agreement, including any renewals and extension, the Organization shall maintain at its expense, insurance coverage of such types and with such terms and limits as may be reasonably associated with the Agreement. Evidence of such insurance shall be provided to the Foundation in writing from the covering insurance company, within 30 days of the effective date of the Agreement. The following types of insurance are required:

- A. Commercial General Liability Insurance
- B. Workers’ Compensation
- C. Employer’s Liability (100,000/100,000/500,000 as minimum limits) or other coverage limits if established by Florida statutes.

**IX. Project Management:**

The Foundation and the Organization designate their respective representatives, identified below for program reporting, coordination, communication, and management of the Project.

**FOUNDATION:**

Name: Joey D’Souza Position: Program Manager  
Address: 1709 Hermitage Blvd., Suite 100, Tallahassee, FL 32308  
Telephone: (850) 224-4493 Email: joseph@abletrust.org

Name: Dornecia Allen Position: Grant Manager  
Address: 1709 Hermitage Blvd., Suite 100, Tallahassee, FL 32308  
Telephone: (850) 544-4899 Email: dornecia@ovidsolutions.net

**CONTACT INFORMATION FOR ORGANIZATION:**

Name: Steven Allen Position: Project Coordinator  
Address: 1204 Gulf Ave, Carrabelle, FL 32322  
Telephone: (850) 879-2631 Email: 1.steven.allen@gmail.com

Name: Sherrie Buchanan Position: Fiscal Representative  
Address: PO Box 5136 Tallahassee FL 32322  
Telephone: (850) 251-6482 Email: admin@disabilitypolicyworks.com

Name: Steven Allen Position: Chief Executive  
Address: 1204 Gulf Ave, Carrabelle, FL 32322  
Telephone: (850) 879-2631 Email: 1.steven.allen@gmail.com


**X.** This Agreement is non-transferable by Organization unless agreed in writing by Foundation.

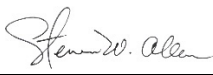
Organization and Foundation accept the terms of this contract by signing below. Organization states it is authorized to enter into this contract by the signature below. Any and all required approvals, consents, and corporate actions have been taken or obtained by the Organization to allow it to enter into and perform this contract.

IN WITNESS WHEREOF, the parties have signed this Memorandum of Agreement on the dates set forth below.

**The Able Trust**

**Organization**

By:   
Allison Chase, President & CEO

By:   
Title: PolicyWorks President

Date: 12/22/2023

Date: 12/20/23