

Donation

Version 2.4 released on 7/24/23

Updated RFA for donations including travel donations (use employee reimbursement process for travel approvals)



CITY COUNCIL USE ONLY		CITY CLERK USE ONLY	
Date Received: _____	Tracking #: _____	<input type="checkbox"/> Scanned	Date: <u>08.23.2023</u>
Committee Date: _____	Committee: _____	<input type="checkbox"/> Posted	Item #: <u>2308.01883</u>
1 st Agenda Date: _____	Hearing Date: _____		
	2 nd Agenda Date: _____		

All department items requiring Council approval must be submitted through the Mayor's Office.

Primary Details

Board Approval		Other Board Name	City Council Approval
_____		_____	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Department	Contact Name	Email	Phone
Human Resources	Kathleen Underwood	kunderwood@cityoftulsa.org	918-596-7445
Bid/Project Number	Project Title	Donator	Type of Donation
_____	_____	Tulsa FOP93 Health and Welfare Trust	Other
<i>Enter a Bid or Project Number (not a Title or Description)</i>		Event Date	Donation Amount/Value
_____		9/29/23 - 10/05/2023	\$6,725.00
Travel Event Title	Traveler's Name	<i>City Council requires a dollar value</i>	
Training at IFEBP	Kathleen Underwood	<u>Boston, Massachusetts</u>	

Budget

Funding Source(s)

TOTAL:

Enter the funding source(s) using the appropriate Munis funding format: Org (Allocation Code)-Object-Amount (1001211-531401-\$10.00) or Project String-Amount (144104.Abst>Title5413102.6001-4043122-541102-\$30,000.01)

Approvals

Department:	<u>Erica Felix-Warwick</u>	Date:	<u>8/18/2023</u>
Legal:	_____	Date:	_____
Board:	_____	Date:	_____
Mayor:	_____	Date:	_____
Other:	_____	Date:	_____

Policy Statement

Background Information

Kathleen Underwood was appointed by the Mayor to sit on the FOP 93 Health and Trust Board. She is a voting member pursuant to the Tulsa FOP 93 CBA.

Provide background information on the requested action.

Summation of the Requested Action

The Board will collectively be attending the Trustee Master's Program and the Certificate of Achievement in Public Plan Policy-Health (CAPPP-Health) programs. There will also be various training modules throughout the week. Not only will this training be beneficial for Kathleen in her role on the FOP board but this training and certification(s) will also be valuable in her current role as Employee Benefits Manager for the City of Tulsa.

Summarize the pertinent details of the requested action

Other Pertinent Details

All training and travel cost are covered by the Tulsa FOP 93 Health and Welfare Trust. Requesting that Kathleen's attendance be considered 'time worked' for September 29, 2023 through October 5, 2023.

Provide any additional information that should be considered when considering approval of this contract document

Processing Information for City Clerk's Office

Post Execution Processing

- Mail vendor copy (addtl signature copies attached)
- Must be filed with other governmental entity
- Addtl governmental entity approval(s) required

Additional Routing and Processing Details



Tulsa FOP 93 Health and Welfare Trust

August 15, 2023

City of Tulsa: Mayor's Office
Attn: Mayor G.T. Bynum
175 E. 2nd Street
Tulsa, OK 74103

In Reference: Tulsa FOP93 Health and Welfare Trust Training at IFEBP- Boston 2023

As part of our ongoing business of operating the Tulsa FOP93 Health and Welfare Trust we must attend training. This year we will be attending training September 30, 2023 through October 4, 2023. The course is sponsored by the International Foundation of Employee Benefit Plans and board members will be attending the Trustee Master's Program and the Certificate of Achievement in Public Plan Policy- Health (CAPP-Health) program.

Kathleen Underwood is the City of Tulsa appointee, and voting member for the Health Trust pursuant to the Tulsa FOP 93 Collective Bargaining Agreement.

All training and travel costs are covered by the Tulsa FOP93 Health and Welfare Trust. We only request that Kathleen Underwood's attendance be considered "time worked" and for September 29, 2023 and October 5, 2023 to be considered travel days.

Thank you in advance for your help.

Sincerely,

Cory Crosier, Chairman

Tulsa FOP93 Health and Welfare Trust

Mailing Address: P.O. Box 691764 Tulsa, OK 74169-1764