

Donation

Version 2.6 released on 7/1/25
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>08.27.2025</u>
Committee Date: _____	Committee: _____	<input type="checkbox"/> Posted	Item #: <u>2508.02168</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="radio"/> Yes <input type="radio"/> No
Department	Contact Name	Email	Phone
Human Resources	Kathleen Underwood	kunderwood@cityoftulsa.org	9185967445
Bid/Project Number	Project Title	Donator	Type of Donation
_____	_____	Tulsa FOP93 Health and Welfare Trust	_____
<i>Enter a Bid or Project Number (not a Title or Description)</i>		Event Date	Donation Amount/Value
Travel Event Title	Traveler's Name	<u>Nov 16 - 13</u>	\$7,000.00
Training at IFEBP	Kathleen Underwood	<u>Honolulu, Hawaii</u>	<i>City Council requires a dollar value</i>

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>8/22/2025</u>
Legal:	_____	Date:	_____
Board:	_____	Date:	_____
Mayor:	<u>[Signature]</u>	Date:	<u>AUG 27 2025</u>
Other:	_____	Date:	_____

Policy Statement

Background Information

Kathleen Underwood was appointed by the Mayor to sit on the FOP93 Health and Welfare Trust Board. She is a voting member pursuant to the Tulsa FOP93 CBA.

Provide background information on the requested action.

Summation of the Requested Action

The Board will collectively be attending the IFEBP Conference. Kathleen will be attending New Trustee Level 1: Core Concepts Training at the Conference. 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 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 will be donated by the Tulsa FOP93 Health and Welfare Trust. Approval of donation is requested.

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



Tulsa FOP 93 Health and Welfare Trust

August 13, 2025

City of Tulsa: Mayor's Office
Attn: To Whom it May Concern
175 E. 2nd Street
Tulsa, OK 74103

In Reference: Tulsa FOP93 Health and Welfare Trust Annual Training at IFEBP Conference 2025

As part of our ongoing business of operating the Tulsa FOP93 Health and Welfare Trust we must conduct yearly training. This year we will be attending training November 7, 2025 through November 12, 2025. The course is sponsored by the International Foundation of Employee Benefit Plans and board members will be attending the New Trustees Level I: Core Concepts.

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

All training costs are covered by the Tulsa FOP 93 Health and Welfare Trust. Our only request from the City of Tulsa is that Kathleen Underwood's time spent at the meeting be considered "time worked", and for November 6, 2025 and November 13, 2025 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