

73 Eglin Parkway NE, Suite 111  
Fort Walton Beach, FL 32548

101 James Lee Boulevard  
Crestview, FL 32536

506 Highway 85 North  
Niceville, FL 32578

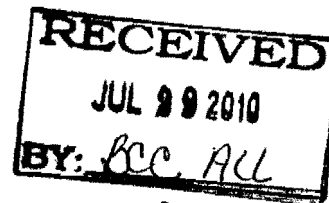


4012 Commons Dr. West, Unit 122  
Destin, FL 32541

310 Van Matre Ave.  
Suite 155, Building 210  
Eglin AFB, FL 32542

(850) 689-5700 (850) 651-7300

**CHRIS HUGHES**  
**OKALOOSA COUNTY TAX COLLECTOR**  
www.okaloosatax.com



*cc: Gary Stanford*

July 28, 2010

Ms. Cathy Galavis, Budget Supervisor  
Property Tax Oversight  
2450 Shumard Oak Boulevard  
Room 2-3214  
Tallahassee, Florida 32399-0100

Dear Ms. Galavis,

In compliance with Section 195.087, Florida Statutes, please find attached the proposed budget for the Okaloosa County Tax Collector's office for the period of October 1, 2010 through September 30, 2011. This budget conforms to the requirements and specifications in the Tax Collector's Instruction Workbook which is provided annually by the Department.

I certify that the information contained herein is a true and accurate presentation of our work program during this period and of our expenditures indicated during prior periods.

Sincerely,

Chris Hughes  
Okaloosa County Tax Collector

Enclosures

cc: Board of County Commissioners

**OKALOOSA**

**TAX COLLECTOR'S**

DR-584 TC

**COUNTY**

**SUMMARY OF THE 2010-2011 BUDGET BY APPROPRIATION CATEGORY**

R 3/01

**EXHIBIT A**

OBJECT CODE	ACTUAL EXPENDITURES 2008-09	APPROVED BUDGET 2009-10	ACTUAL EXPENDITURES 6/30/2010	REQUEST 2010-11	INCREASE/(DECREASE)		AMOUNT APPROVED 2010-11
					AMOUNT	%	
(1)	(2)	(3)	(4)	(5)	(6)	(6a)	(7)
PERSONAL SERVICES (Sch. 1-1A)	\$ 3,961,117	\$ 4,186,612	\$ 3,034,479	\$ 4,768,203	\$ 581,591	13.89%	
OPERATING EXPENSES (Sch. II)	\$ 1,050,536	\$ 1,171,633	\$ 686,644	\$ 1,160,126	\$ (11,507)	-0.98%	
OPERATING CAPITAL OUTLAY (Sch. III)	\$ 112,075	\$ 105,000	\$ 90,968	\$ 199,500	\$ 94,500	90.00%	
TOTAL EXPENDITURES	\$ 5,123,728	\$ 5,463,245	\$ 3,812,091	\$ 6,127,829	\$ 664,584	12.16%	
NUMBER OF POSITIONS		68		81	13.00	19.12%	
					COL (5) - (3)	COL (6) / (3)	

DOR USE ONLY

Pos. No.	Position Classification	Annual Rate 9/30/2010	Position Designation	REQUESTED INCREASES			Annual Rate 9/30/2011	APPROVED INCREASES			Annual Rate 9/30/2011
				Guideline	Other	Funding		Guideline	Other	Funding	
(1)	(2)	(3)	(3a)	(4a)	(4b)	(5)	(6)	(7a)	(7b)	(8)	(9)
1	Tax Collector	\$ 125,254				\$ 125,254	\$ 125,254				
2	Assistant Tax Collector	\$ 104,000	S			\$ 104,000	\$ 104,000				
3	Director of Finance	\$ 96,000	S			\$ 96,000	\$ 96,000				
4	Chief Technology Officer	\$ 70,000	S			\$ 70,000	\$ 70,000				
5	Asst Dir. of Finance for Collections	\$ 68,675	S			\$ 68,675	\$ 68,675				
6	Clerk	\$ 27,818				\$ 27,818	\$ 27,818				
7	Director of Operations	\$ 90,000	S			\$ 90,000	\$ 90,000				
8	Branch Manager	\$ 52,000				\$ 52,000	\$ 52,000				
9	Director of Licenses & Taxes	\$ 77,000	S			\$ 77,000	\$ 77,000				
10	Branch Manager	\$ 52,215	D			\$ 52,215	\$ 52,215				
11	Branch Manager	\$ 58,500	D			\$ 58,500	\$ 58,500				
12	Branch Manager	\$ 46,000				\$ 46,000	\$ 46,000				
13	Tax Administrator	\$ 42,000				\$ 42,000	\$ 42,000				
14	Field Staff Manager	\$ 45,000				\$ 45,000	\$ 45,000				
15	Bookkeeper II	\$ 52,814	D			\$ 52,814	\$ 52,814				
16	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
17	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
18	Assistant Branch Manager	\$ 40,160				\$ 40,160	\$ 40,160				
19	Assistant Branch Manager	\$ 39,000				\$ 39,000	\$ 39,000				
20	Assistant Branch Manager	\$ 39,160				\$ 39,160	\$ 39,160				
21	Assistant Branch Manager	\$ 34,488				\$ 34,488	\$ 34,488				
22	Branch Manager	\$ 54,000				\$ 54,000	\$ 54,000				
23	Director of Community Relations	\$ 50,000				\$ 50,000	\$ 50,000				
24	Assistant Branch Manager	\$ 39,160				\$ 39,160	\$ 39,160				
25	Processing Administrator	\$ 38,000				\$ 38,000	\$ 38,000				
26	Training Facilitator	\$ 35,000				\$ 35,000	\$ 35,000				
27	Branch Supervisor	\$ 33,000				\$ 33,000	\$ 33,000				
28	Branch Supervisor	\$ 33,548				\$ 33,548	\$ 33,548				
29	Branch Supervisor	\$ 29,484				\$ 29,484	\$ 29,484				
30	Branch Supervisor	\$ 32,400				\$ 32,400	\$ 32,400				
31	Senior Clerk	\$ 32,240				\$ 32,240	\$ 32,240				
32	Senior Clerk	\$ 28,560				\$ 28,560	\$ 28,560				
33	Senior Clerk	\$ 28,000				\$ 28,000	\$ 28,000				
34	Branch Supervisor	\$ 32,000				\$ 32,000	\$ 32,000				
35	Clerk	\$ 28,065				\$ 28,065	\$ 28,065				
36	Senior Clerk	\$ 28,000				\$ 28,000	\$ 28,000				
37	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				

DOR USE ONLY

Pos. No.	Position Classification	Annual Rate 9/30/2010	Position Designation	REQUESTED INCREASES			Annual Rate 9/30/2011	APPROVED INCREASES			Annual Rate 9/30/2011
				Guideline	Other	Funding		Guideline	Other	Funding	
(1)	(2)	(3)	(3a)	(4a)	(4b)	(5)	(6)	(7a)	(7b)	(8)	(9)
38	Senior Clerk	\$ 28,195				\$ 28,195	\$ 28,195				
39	Clerk	\$ 27,312				\$ 27,312	\$ 27,312				
40	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
41	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
42	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
43	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
44	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
45	Executive Assistant	\$ 48,150				\$ 48,150	\$ 48,150				
46	Field Agent	\$ 34,000				\$ 34,000	\$ 34,000				
47	Field Agent	\$ 36,075				\$ 36,075	\$ 36,075				
48	Field Agent	\$ 32,000				\$ 32,000	\$ 32,000				
49	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
50	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
51	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
52	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
53	Asst Dir. of Finance for Operations	\$ 61,200	S			\$ 61,200	\$ 61,200				
54	Director of Human Resources	\$ 53,000				\$ 53,000	\$ 53,000				
55	Assistant IT Coordinator	\$ 30,500				\$ 30,500	\$ 30,500				
56	Branch Supervisor	\$ 34,180				\$ 34,180	\$ 34,180				
57	Branch Manager	\$ 47,000				\$ 47,000	\$ 47,000				
58	Assistant Branch Manager	\$ 35,000				\$ 35,000	\$ 35,000				
59	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
60	Chief Deputy Tax Collector	\$ 104,000	S			\$ 104,000	\$ 104,000				
61	Senior Clerk	\$ 28,000				\$ 28,000	\$ 28,000				
62	Senior Clerk	\$ 28,000				\$ 28,000	\$ 28,000				
63	Senior Clerk	\$ 28,984				\$ 28,984	\$ 28,984				
64	Senior Clerk	\$ 32,664				\$ 32,664	\$ 32,664				
65	Senior Clerk	\$ 28,560				\$ 28,560	\$ 28,560				
66	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
67	Clerk	\$ 27,000				\$ 27,000	\$ 27,000				
68	Superintendent of Maintenance	\$ 32,000				\$ 32,000	\$ 32,000				
<b>New Positions:</b>											
69	Manager					\$ 47,000	\$ 47,000				
70	Clerk					\$ 27,000	\$ 27,000				
71	Clerk					\$ 27,000	\$ 27,000				
72	Clerk					\$ 27,000	\$ 27,000				

OKALOOSA COUNTY

DETAIL OF SALARIES (CONT.)

SCHEDULE 1

DOR USE ONLY

Pos. No.	Position Classification	Annual Rate 9/30/2010	Position Designation	REQUESTED INCREASES			Annual Rate 9/30/2011	APPROVED INCREASES			Annual Rate 9/30/2011
				Guideline	Other	Funding		Guideline	Other	Funding	
(1)	(2)	(3)	(3a)	(4a)	(4b)	(5)	(6)	(7a)	(7b)	(8)	(9)
73	Clerk					\$ 27,000	\$ 27,000				
74	Clerk					\$ 27,000	\$ 27,000				
75	Clerk					\$ 27,000	\$ 27,000				
76	Clerk					\$ 27,000	\$ 27,000				
77	Clerk					\$ 27,000	\$ 27,000				
78	Clerk					\$ 24,750	\$ 27,000				
79	Clerk					\$ 24,750	\$ 27,000				
80	Clerk					\$ 24,750	\$ 27,000				
81	Manager					\$ 42,167	\$ 46,000				
<b>SUMMARY</b>											
1	Official	\$ 125,254		\$ -	\$ -	\$ 125,254	\$ 125,254				
67	Current Employees	\$ 2,710,107		\$ -	\$ -	\$ 2,710,107	\$ 2,710,107				
13	New Positions					\$ 379,417	\$ 390,000				
81	<b>TOTAL</b>	<b>\$ 2,835,361</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,214,778</b>	<b>\$ 3,225,361</b>				

\* includes \$2,000 bonus

## OKALOOSA COUNTY

## DETAIL OF PERSONAL SERVICES

## SCHEDULE 1A

OBJECT CODE	ACTUAL EXPENDITURES 2008-09	APPROVED BUDGET 2009-10	ACTUAL EXPENDITURES 6/30/2010	REQUEST 2010-11	INCREASE/(DECREASE)		AMOUNT APPROVED 2010-11
					AMOUNT	%	
(1)	(2)	(3)	(4)	(5)	(6)	(6a)	(7)
<b>PERSONAL SERVICES:</b>							
11 OFFICIAL	\$ 125,139	\$ 125,254	\$ 92,141	\$ 125,254	\$ -	0.00%	
12 EMPLOYEES (REGULAR)	\$ 2,608,777	\$ 2,710,107	\$ 1,985,015	\$ 3,089,524	\$ 379,417	14.00%	
13 EMPLOYEES (TEMPORARY)	\$ 42,457	\$ 52,350	\$ 20,098	\$ 52,350	\$ -	0.00%	
14 OVERTIME	\$ -	\$ -	\$ -	\$ -	\$ -	-	
15 SPECIAL PAY	\$ 97,770	\$ 61,945	\$ 43,061	\$ 59,695	\$ (2,250)	-3.63%	
<b>21 FICA</b>							
2152 REGULAR 7.65%	\$ 207,493	\$ 225,648	\$ 206,982	\$ 254,502	\$ 28,854	12.79%	
2153 OTHER	\$ -	\$ -	\$ -	\$ -	\$ -	-	
<b>22 RETIREMENT</b>							
2251 OFFICIAL 18.64%	\$ 20,686	\$ 21,368	\$ 15,231	\$ 23,347	\$ 1,979	9.26%	
2252 EMPLOYEE 10.77%	\$ 191,397	\$ 199,100	\$ 139,410	\$ 251,153	\$ 52,053	26.14%	
2253 SMSC 14.57%	\$ 80,744	\$ 92,255	\$ 66,756	\$ 102,328	\$ 10,073	10.92%	
2254 DROP 12.25%	\$ 14,310	\$ 18,819	\$ 13,533	\$ 20,492	\$ 1,673	8.89%	
23 LIFE & HEALTH INSURANCE	\$ 549,311	\$ 660,266	\$ 434,684	\$ 770,558	\$ 110,292	16.70%	
24 WORKER'S COMPENSATION	\$ 21,894	\$ 16,000	\$ 15,227	\$ 15,500	\$ (500)	-3.13%	
25 UNEMPLOYMENT COMP.	\$ 1,139	\$ 3,500	\$ 2,340	\$ 3,500	\$ -	0.00%	
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 3,961,117</b>	<b>\$ 4,186,612</b>	<b>\$ 3,034,478</b>	<b>\$ 4,768,203</b>	<b>\$ 581,591</b>	<b>13.89%</b>	

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Col. (5) Ex. A

Col. (5) - (3)

Col. (6) / (3)

OKALOOSA COUNTY		DETAIL OF OPERATING EXPENSES					SCHEDULE II	
OBJECT CODE	ACTUAL EXPENDITURES 2008-09	APPROVED BUDGET 2009-10	ACTUAL EXPENDITURES 6/30/2010	REQUEST 2010-11	INCREASE/(DECREASE)		AMOUNT APPROVED 2010-11	
					AMOUNT	%		
(1)	(2)	(3)	(4)	(5)	(6)	(6a)	(7)	
<b>OPERATING EXPENSES:</b>								
<b>31 PROFESSIONAL SERVICES</b>								
3151 E.D.P.	\$ 47,406	\$ 37,455	\$ 12,194	\$ 30,705	\$ (6,750)	-18.02%		
3154 LEGAL	\$ 83,432	\$ 60,900	\$ 26,078	\$ 58,100	\$ (2,800)	-4.60%		
3159 OTHER	\$ -	\$ -	\$ -	\$ -	\$ -	-		
32 ACCOUNTING & AUDITING	\$ 128	\$ 35,000	\$ 14,200	\$ 20,000	\$ (15,000)	-42.86%		
33 COURT REPORTER	\$ -	\$ -	\$ -	\$ -	\$ -	-		
34 OTHER CONTRACTUAL	\$ -	\$ -	\$ -	\$ -	\$ -	-		
40 TRAVEL	\$ 50,525	\$ 51,323	\$ 22,399	\$ 59,255	\$ 7,932	15.46%		
41 COMMUNICATIONS	\$ 21,407	\$ 27,360	\$ 16,190	\$ 24,504	\$ (2,856)	-10.44%		
<b>42 TRANSPORTATION</b>								
4251 POSTAGE	\$ 106,797	\$ 156,744	\$ 46,566	\$ 159,889	\$ 3,145	2.01%		
4252 FREIGHT	\$ -	\$ -	\$ -	\$ -	\$ -	-		
43 UTILITIES	\$ 40,276	\$ 42,300	\$ 28,962	\$ 35,700	\$ (6,600)	-15.60%		
<b>44 RENTALS &amp; LEASES</b>								
4451 OFFICE EQUIPMENT	\$ 14,582	\$ 14,680	\$ 11,348	\$ 15,460	\$ 780	5.31%		
4452 VEHICLES	\$ -	\$ -	\$ -	\$ -	\$ -	-		
4453 OFFICE SPACE	\$ 185,814	\$ 195,000	\$ 165,504	\$ 215,500	\$ 20,500	10.51%		
4454 E.D.P.	\$ 44,890	\$ 80,000	\$ -	\$ 40,000	\$ (40,000)	-50.00%		
45 INSURANCE & SURETY	\$ 64,406	\$ 68,570	\$ 59,902	\$ 62,960	\$ (5,610)	-8.18%		

## OKALOOSA COUNTY

## DETAIL OF OPERATING EXPENSES (CONT.)

## SCHEDULE II

OBJECT CODE (1)	ACTUAL EXPENDITURES 2008-09 (2)	APPROVED BUDGET 2009-10 (3)	ACTUAL EXPENDITURES 6/30/2010 (4)	REQUEST 2010-11 (5)	INCREASE/(DECREASE)		AMOUNT APPROVED 2010-11 (7)
					AMOUNT (6)	% (6a)	
<b>46 REPAIR &amp; MAINTENANCE</b>							
4651 OFFICE EQUIPMENT	\$ 1,607	\$ 3,000	\$ -	\$ 3,620	\$ 620	20.67%	
4652 VEHICLES	\$ 4,304	\$ 10,000	\$ 3,321	\$ 9,600	\$ (400)	-4.00%	
4653 OFFICE SPACE	\$ 1,663	\$ 6,000	\$ 1,535	\$ 3,590	\$ (2,410)	-40.17%	
4654 E.D.P.	\$ 180,784	\$ 240,000	\$ 188,581	\$ 232,250	\$ (7,750)	-3.23%	
47 PRINTING & BINDING	\$ -	\$ -	\$ -	\$ -	\$ -	-	
48 PROMOTIONAL	\$ -	\$ -	\$ -	\$ -	\$ -	-	
<b>49 OTHER CURRENT CHARGES</b>							
4951 LEGAL ADVERTISEMENTS	\$ 19,597	\$ 20,000	\$ 20,648	\$ 24,650	\$ 4,650	23.25%	
4959 OTHER	\$ -	\$ -	\$ -	\$ -	\$ -	-	
51 OFFICE SUPPLIES	\$ -	\$ -	\$ -	\$ -	\$ -	-	
52 OPERATING SUPPLIES	\$ 154,330	\$ 90,608	\$ 51,248	\$ 125,464	\$ 34,856	38.47%	
<b>54 BOOKS &amp; PUBLICATIONS</b>							
5451 BOOKS	\$ -	\$ -	\$ -	\$ -	\$ -	-	
5452 SUBSCRIPTIONS	\$ -	\$ -	\$ -	\$ -	\$ -	-	
5453 EDUCATION	\$ 19,837	\$ 21,101	\$ 9,632	\$ 29,192	\$ 8,091	38.34%	
5454 DUES / MEMBERSHIPS	\$ 8,753	\$ 11,592	\$ 8,336	\$ 9,687	\$ (1,905)	-16.43%	
<b>TOTAL OPERATING EXPENSES</b>	\$ 1,050,536	\$ 1,171,633	\$ 686,644	\$ 1,160,126	\$ (11,507)	-0.98%	\$ -

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## OKALOOSA COUNTY

## DETAIL OF OPERATING CAPITAL OUTLAY

## SCHEDULE III

OBJECT CODE	ACTUAL EXPENDITURES 2008-09	APPROVED BUDGET 2009-10	ACTUAL EXPENDITURES 6/30/2010	REQUEST 2010-11	INCREASE/(DECREASE)		AMOUNT APPROVED 2010-11
					AMOUNT	%	
(1)	(2)	(3)	(4)	(5)	(6)	(6a)	(7)
<b>CAPITAL OUTLAY:</b>							
62 BUILDINGS	\$ 21,962	\$ -	\$ 3,420	\$ -	\$ -	-	
<b>64 MACHINERY &amp; EQUIPMENT</b>							
6451 E.D.P.	\$ 34,364	\$ 90,000	\$ 87,548	\$ 91,500	\$ 1,500	1.67%	
6452 OFFICE FURNITURE	\$ 33,498	\$ 15,000	\$ -	\$ 100,000	\$ 85,000	566.67%	
6453 OFFICE EQUIPMENT	\$ 1,914	\$ -	\$ -	\$ 8,000	\$ 8,000	-	
6454 VEHICLES	\$ 20,337	\$ -	\$ -	\$ -	\$ -	-	
66 BOOKS	\$ -	\$ -	\$ -	\$ -	\$ -	-	
<b>TOTAL CAPITAL OUTLAY</b>	<b>\$ 112,075</b>	<b>\$ 105,000</b>	<b>\$ 90,968</b>	<b>\$ 199,500</b>	<b>\$ 94,500</b>	<b>90.00%</b>	

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Col. (5) - (3)

Col. (6) / (3)



**STATEMENT OF COMMISSIONS AND EXPENDITURES  
OKALOOSA COUNTY**

**EXHIBIT B**

DESCRIPTION	ACTUAL 10/1/08 - 9/30/09	ACTUAL 10/1/09 - 6/30/10	ESTIMATED 7/1/10 - 9/30/10	TOTAL 2009-10	ESTIMATED 2010-11
(1)	(2)	(3)	(3A)	(3B)	(4)
<b>Commissions:</b>					
<b>State</b>					
Motor Vehicles	\$896,226	\$610,325	\$293,600	\$903,925	\$930,000
Driver License	\$78,780	\$60,880	\$21,250	\$82,130	\$445,550
Environmental Protection	\$0	\$0	\$0	\$0	\$0
Game and Fish	\$21,600	\$13,227	\$4,350	\$17,577	\$17,000
Sales Tax	\$9,354	\$6,289	\$2,575	\$8,864	\$9,570
<b>County</b>	\$3,863,463	\$3,399,767	\$31,250	\$3,431,017	\$3,400,000
<b>Districts</b>	\$531,878	\$448,957	\$117,500	\$566,457	\$450,000
Tax Sale	\$665,574	\$633,808	\$0	\$633,808	\$650,000
Advertisements	\$7,018	\$22,971	\$0	\$22,971	\$8,000
<b>Other - List</b>					
Business Tax Receipts	\$106,365	\$29,423	\$81,500	\$110,923	\$115,000
Interest (Earned)	\$94,419	\$46,637	\$11,500	\$58,137	\$100,000
Miscellaneous Income	\$18,341	\$25,196	\$2,750	\$27,946	\$15,000
Branch Fees	\$135,313	\$112,272	\$31,425	\$143,697	\$140,000
<b>Total Commissions</b>	<b>\$6,428,331</b>	<b>\$5,409,752</b>	<b>\$597,700</b>	<b>\$6,007,452</b>	<b>\$6,280,120</b>
<b>Less Operating Expenditures</b>	<b>\$5,123,727</b>	<b>\$3,812,091</b>	<b>\$1,651,154</b>	<b>\$5,463,245</b>	<b>\$6,127,829</b>
<b>Balance</b>	<b>\$1,304,604</b>	<b>\$1,597,661</b>		<b>\$544,207</b>	<b>\$152,291</b>

**OKALOOSA COUNTY**

**JUSTIFICATION SHEET**

OBJECT CODE		SCHEDULE	AMOUNT OF INCREASE (DECREASE)	JUSTIFICATION
NUMBER	NAME			
1	Detail of Salaries	1	\$ -	Salary set by 145.11, Florida Statutes. No increase because no estimate was provided at time of budget submittal. Adjustments will be made by DOR upon receipt of final factors.
2	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
3	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
4	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
5	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
6	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
7	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
8	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
9	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
10	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
11	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
12	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
13	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
14	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
15	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
16	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
17	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
18	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
19	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
20	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
21	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
22	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
23	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
24	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
25	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
26	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
27	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
28	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
29	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
30	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
31	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
32	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
33	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
34	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
35	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package
36	Detail of Salaries	1	-	Based on current salary increases (0%) per Okaloosa County BCC Compensation Package



## OKALOOSA COUNTY

## JUSTIFICATION SHEET

OBJECT CODE		SCHEDULE	AMOUNT OF INCREASE (DECREASE)	JUSTIFICATION
NUMBER	NAME			
74	Detail of Salaries	1	27,000	New position. See attached Permanent Position Justification.
75	Detail of Salaries	1	27,000	New position. See attached Permanent Position Justification.
76	Detail of Salaries	1	27,000	New position. See attached Permanent Position Justification.
77	Detail of Salaries	1	27,000	New position. See attached Permanent Position Justification.
78	Detail of Salaries	1	24,750	New position. See attached Permanent Position Justification.
79	Detail of Salaries	1	24,750	New position. See attached Permanent Position Justification.
80	Detail of Salaries	1	24,750	New position. See attached Permanent Position Justification.
81	Detail of Salaries	1	42,167	New position. See attached Permanent Position Justification.
TOTAL			<b>\$ 379,417</b>	

## OKALOOSA COUNTY

## JUSTIFICATION SHEET

OBJECT CODE		SCHEDULE	AMOUNT OF INCREASE (DECREASE)	JUSTIFICATION
NUMBER	NAME			
11	Official	1A	\$ -	Salary set by 145.11, Florida Statutes (includes \$2,000 certification bonus)
12	Employees (Regular)	1A	379,417	See Detailed Salary Justification sheet and Summary of Schedule 1 Detail of Salaries
13	Employees (Temporary)	1A	-	2 part time clerks, 40 hours pay period at \$12.98 per hour, performing clerical duties. 1 part time clerk, 40 hours pay period at \$10.00 per hour, performing clerical duties, and 1 part time clerk, 50 hours pay period at \$11.50 per hour, performing clerical duties. *Pay periods are biweekly
15	Special Pay	1A	(2,250)	Certification pay for course completion (amount based on OCTC Policy #130)/32 employees, total \$41,750, not including the Tax Collector (see attached certification worksheet), Annual leave payout for employee eligible for Drop (hourly rate of \$32.89 X 500 annual leave hours for total of \$16,445), Annual leave payout for employees' separation (\$1,500)
2152	FICA Regular	1A	28,854	7.65% of total salaries plus special pay of \$59,695 (\$3,326,823)
2251	Retirement - Official	1A	1,979	18.64% of official salary (\$125,254)
2252	Retirement - Employee	1A	52,053	10.77% of total employee salary (\$3,089,524), plus Temporary pay (\$52,350), plus special pay (\$59,695), less SMSC employee's salary pos. #2,3,4,5,7,9,53,60 (\$670,875) & DROP pos. #10,11,15 (\$163,529), less certification pay for SMSC and DROP (\$18,750), less annual leave payout for employee eligible for Drop (\$16,445) (\$2,331,970)
2253	Retirement - SMSC	1A	10,073	14.57% of total SMSC salary pos. #2,3,4,5,7,9,53,60 (\$670,875), plus certification pay of (\$15,000), plus annual leave payout for employee eligible for Drop (\$16,445) (\$702,320)
2254	Retirement - DROP	1A	1,673	12.25% of total DROP salary pos. #10,11,15 (\$163,529) plus certification pay of \$3,750 (\$167,279)
23	Life & Health Insurance	1A	110,292	Health - 77 emp for 12 months at \$752.03 plus 4 emp for 11 months at \$752.03, Dental - 77 emp for 12 months at \$30.00 plus 4 emp for 11 months at \$30.00, Life/LTD - 77 emp for 12 months at \$14.00 plus 4 emp for 11 months at \$14.00. *Amounts are per month.
24	Worker's Compensation	1A	(500)	amount quoted by BCC
25	Unemployment Comp.	1A	-	estimate of expected claims for unemployment
	<b>TOTAL SCHEDULE 1A</b>		<b>\$ 581,591</b>	
3151	Electronic Data Proc.	II	\$ (6,750)	EthicsPoint , Quark software (for publishing), web domain, internet services, Office software licenses, bankruptcy software license, Accruint software license, MS Action Pack
3154	Prof. Services - Legal	II	(2,800)	Bankruptcy, Personnel Issues, TPP tax warrants, and other misc. legal
32	Accounting & Auditing	II	(15,000)	internal auditing services
40	Travel	II	7,932	in-county and out of county travel to include all mileage, per diem, lodging, and misc travel expenses. Also includes travel for Field Enforcement Agents. See attached travel worksheet.
41	Telephone	II	(2,856)	phone/wireless service
4251	Postage	II	3,145	Postage for DMV renewals, H&F, BTR, metered mail, certified mail, and priority letters. See attached postage worksheet
43	Utilities	II	(6,600)	electric and water/sewer for Niceville and Destin offices.
4451	R/L Office Equipment	II	780	postage machine, water dispenser, and copy machines.

## OKALOOSA COUNTY

## JUSTIFICATION SHEET

OBJECT CODE		SCHEDULE	AMOUNT OF INCREASE (DECREASE)	JUSTIFICATION
NUMBER	NAME			
4453	R/L Office Space	II	20,500	rent for Niceville office. Based on CPI data.
4454	R/L E.D.P.	II	(40,000)	Drivers License equipment for Crestview office
45	Insurance & Surety	II	(5,610)	property insurance quoted by BCC, association insurance for Destin office, and notary renewals.
4651	R/M Office Equipment	II	620	misc. repairs to typewriters, calculators, etc.
4652	R/M Vehicles	II	(400)	cleaning and preventative maintenance of vehicle fleet.
4653	R/M Office Space	II	(2,410)	alarm monitoring, carpet cleaning, and misc. office repairs
4654	R/M EDP	II	(7,750)	TAXSYS, Escrow Express, RTL High speed Maint., TagTalk, Fundware, Cisco Smartnet Maintenance, DL320 maintenance, Survey Monkey, AV updates, ALS printer maint., and disaster recovery.
4951	Legal Advertisements	II	4,650	open roll and delinquent roll ad and promotional advertising
52	Operating Supplies	II	34,856	misc. office supplies, envelopes, toner cartridges, computers, printers, UPS, forms. Increased because of Crestview office move and non-reoccurring supplies needed to establish new office.
5453	Education	II	8,091	registration fees for various education. See attached education worksheet
5454	Dues/Membership	II	(1,905)	newspaper subscriptions, TC Dues, FABTO Dues, city directories, DOR annual dues, NADA appraisal guides
	<b>TOTAL SCHEDULE II</b>		<b>\$ (11,507)</b>	
62	Buildings	III	\$ -	
6451	Equipment E.D.P.	III	1,500	replication server, QFLOW, toughbook laptops
6452	Office Furniture	III	85,000	office and modular furniture for Crestview office.
6453	Office Equipment	III	8,000	dedicated A/C for server room
6454	Vehicles	III	-	
	<b>TOTAL SCHEDULE III</b>		<b>\$ 94,500</b>	
	<b>TOTAL</b>		<b>\$ 664,584</b>	



**PERMANENT POSITION JUSTIFICATION  
OKALOOSA COUNTY**

**POSITION  
DATA:**

Position No.(s) 70,71,72,73,74,75,76,77

Position Title Clerk

Full Time X

Part Time \_\_\_\_\_

Annual Salary Rate \$27,000

Salary Funding \$27,000

Primary functions to be performed:

**Automobile and vessel (titles and registration renewals), hunting and fishing licenses, tax pymts (real and tangible, current and delinquent), business taxes, Driver License services**

**LOCATION:**

Position to be assigned to: Clerk

(Main or Satellite) office: Satellite

Department or Section: Clerk Pool

**WORKLOAD:**

Current direct workload in this unit:

**Responsible for vehicle and vessel registration/renewals and titles, issuing/renewing hunting and fishing licenses, collecting tax payments for current real/tangible and delinquent real/tangible, issuing/renewing business tax receipts, full Driver Licenses services**

Number of positions currently performing this function: 18

Full-Time 18

Mon. Hrs. \_\_\_\_\_

Part-Time \_\_\_\_\_

Mon. Hrs. \_\_\_\_\_

Temporary \_\_\_\_\_

Mon. Hrs. \_\_\_\_\_

# of Months: \_\_\_\_\_

Direct Overtime \_\_\_\_\_

Mon. Hrs. \_\_\_\_\_

Current direct workload per position

Estimated increased workload

**Increased workload will be substantial due to the closure of the State DL offices located in Okaloosa County.**

**NEED:**

Describe the need for the position. This explanation should include, but not be limited to, why alternatives such as reorganization or shifting of responsibilities within your current framework, additional temporary employment or contract services cannot be considered as viable solutions.

**The current DL offices in Okaloosa County are closing and the workload is being transferred to the Tax Collector's Office. Currently, we only offer limited DL services in three (3) of our offices (FWB, Niceville, Destin). Due to the DL closures, we will begin offering full DL service in two (2) of our offices (FWB and Crestview). The variation of DL transactions and the state and federal security requirements placed on these transactions requires more time than a non-DL transaction. It is the policy of the OCTC that clerks perform all tasks, ie. vehicle and vessel, H&F, taxes, BTR's, and DL.**

Total Current Vacancies 0

**PERMANENT POSITION JUSTIFICATION  
OKALOOSA COUNTY**

**POSITION DATA:** Position No.(s) 78,79,80  
 Position Title Clerk Full Time X Part Time \_\_\_\_\_  
 Annual Salary Rate \$27,000 Salary Funding \$24,750

Primary functions to be performed:  
Automobile and vessel (titles and registration renewals), hunting and fishing licenses, tax pymts (real and tangible, current and delinquent), business taxes, Driver License services

**LOCATION:** Position to be assigned to: Clerk (Main or Satellite) office: Main  
 Department or Section: Clerk Pool

**WORKLOAD:** Current direct workload in this unit:  
Responsible for vehicle and vessel registration/renewals and titles, issuing/renewing hunting and fishing licenses, collecting tax payments for current real/tangible and delinquent real/tangible, issuing/renewing business tax receipts, full Driver Licenses services

Number of positions currently performing this function: 18  
 Full-Time 18 Mon. Hrs. \_\_\_\_\_  
 Part-Time \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_  
 Temporary \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_ # of Months: \_\_\_\_\_  
 Direct Overtime \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_

Current direct workload per position  
 \_\_\_\_\_  
 \_\_\_\_\_

Estimated increased workload  
Increased workload will be substantial due to the closure of the State DL offices located in Okaloosa County.

**NEED:** Describe the need for the position. This explanation should include, but not be limited to, why alternatives such as reorganization or shifting of responsibilities within your current framework, additional temporary employment or contract services cannot be considered as viable solutions.  
The current DL offices in Okaloosa County are closing and the workload is being transferred to the Tax Collector's Office. Currently, we only offer limited DL services in three (3) of our offices (FWB, Niceville, Destin). Due to the DL closures, we will begin offering full DL service in two (2) of our offices (FWB and Crestview). The variation of DL transactions and the state and federal security requirements placed on these transactions requires more time than a non-DL transaction. It is the policy of the OCTC that clerks perform all tasks, ie. vehicle and vessel, H&F, taxes, BTR's, and DL.

Total Current Vacancies 0

**PERMANENT POSITION JUSTIFICATION  
OKALOOSA COUNTY**

**POSITION DATA:** Position No.(s) 69  
 Position Title Manager Full Time X Part Time \_\_\_\_\_  
 Annual Salary Rate \$47,000 Salary Funding \$47,000

Primary functions to be performed:  
Supervise the issuance of Driver License services while specializing in IMS, SharePoint, IRIS, and Quality Assurance Audits.

**LOCATION:** Position to be assigned to: Manager (Main or Satellite) office: Satellite  
 Department or Section: Fort Walton Beach

**WORKLOAD:** Current direct workload in this unit:  
Responsible for DL accountability, destruction, and management of supplies in Inventory Management System (IMS). Manage exception requests, fraud, and responsible for reporting unusual occurrences relating to DL through SharePoint. Conduct random checks for errors and fraud through IRIS. Responsible for Quality Assurance Audits to ensure office is in compliance with DL requirements. Conduct meetings and provide training on new systems and procedures.

Number of positions currently performing this function: 0  
 Full-Time 0 Mon. Hrs. \_\_\_\_\_  
 Part-Time \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_  
 Temporary \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_ # of Months: \_\_\_\_\_  
 Direct Overtime \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_

Current direct workload per position

Estimated increased workload  
Increased workload will be substantial due to the closure of the State DL offices located in Okaloosa County.

**NEED:** Describe the need for the position. This explanation should include, but not be limited to, why alternatives such as reorganization or shifting of responsibilities within your current framework, additional temporary employment or contract services cannot be considered as viable solutions.  
The current DL offices in Okaloosa County are closing and the workload is being transferred to the Tax Collector's Office. Currently, we only offer limited DL services in three (3) of our offices (FWB, Niceville, Destin). Due to the DL closures, we will begin offering full DL service in two (2) of our offices (FWB and Crestview). The variation of DL transactions and the state and federal security requirements placed on these transactions requires more time than a non-DL transaction. It is the policy of the OCTC that managers and clerks perform all tasks, ie. vehicle and vessel, H&F, taxes, BTR's, and DL.

Total Current Vacancies 0

**PERMANENT POSITION JUSTIFICATION  
OKALOOSA COUNTY**

**POSITION DATA:** Position No.(s) 81  
 Position Title Manager Full Time X Part Time \_\_\_\_\_  
 Annual Salary Rate \$46,000 Salary Funding \$42,167

Primary functions to be performed:  
Supervise the issuance of Driver License services while specializing in IMS, SharePoint, IRIS, and Quality Assurance Audits.

**LOCATION:** Position to be assigned to: Manager (Main or Satellite) office: Main  
 Department or Section: Crestview

**WORKLOAD:** Current direct workload in this unit:  
Responsible for DL accountability, destruction, and management of supplies in Inventory Management System (IMS). Manage exception requests, fraud, and responsible for reporting unusual occurrences relating to DL through SharePoint. Conduct random checks for errors and fraud through IRIS. Responsible for Quality Assurance Audits to ensure office is in compliance with DL requirements. Conduct meetings and provide training on new systems and procedures.

Number of positions currently performing this function: 0  
 Full-Time 0 Mon. Hrs. \_\_\_\_\_  
 Part-Time \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_  
 Temporary \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_ # of Months: \_\_\_\_\_  
 Direct Overtime \_\_\_\_\_ Mon. Hrs. \_\_\_\_\_

Current direct workload per position  
 \_\_\_\_\_  
 \_\_\_\_\_

Estimated increased workload  
Increased workload will be substantial due to the closure of the State DL offices located in Okaloosa County.

**NEED:** Describe the need for the position. This explanation should include, but not be limited to, why alternatives such as reorganization or shifting of responsibilities within your current framework, additional temporary employment or contract services cannot be considered as viable solutions.  
The current DL offices in Okaloosa County are closing and the workload is being transferred to the Tax Collector's Office. Currently, we only offer limited DL services in three (3) of our offices (FWB, Niceville, Destin). Due to the DL closures, we will begin offering full DL service in two (2) of our offices (FWB and Crestview). The variation of DL transactions and the state and federal security requirements placed on these transactions requires more time than a non-DL transaction. It is the policy of the OCTC that managers and clerks perform all tasks, ie. vehicle and vessel, H&F, taxes, BTR's, and DL.

Total Current Vacancies 0

## EMPLOYEE CERTIFICATION WORKSHEET

### CURRENT DESIGNATIONS (2010-11)

POS. NO.	POSITION TITLE	EMPLOYEE NAME	DATE	ANNUAL AMOUNT
1	Tax Collector	Hughes, Chris	1993	\$ 2,000
2	Assistant Tax Collector	Holguin, John	2008	\$ 2,000
3	Director of Finance	Harkins, Jim	1995	\$ 2,000
4	Chief Technology Officer	Parsons, Eric	2005	\$ 2,000
5	Asst Dir. of Finance for Collections	Owens, Paula	1996	\$ 1,500
7	Director of Operations	Gillespie, Theresa	1996	\$ 2,000
8	Branch Manager	Morrell, Anita	1996	\$ 1,500
9	Director of Licenses & Taxes	Connell, Doug	2006	\$ 2,000
10	Branch Manager	Hanratty, Jolene	1995	\$ 1,500
11	Branch Manager	Baker, Vicky	1995	\$ 1,500
12	Branch Manager	Majors, Jennifer	2006	\$ 1,500
13	Tax Administrator	Keesee, Bruce	2010	\$ 1,500
14	Field Staff Manager	Allen, Josh	2004	\$ 1,500
15	Bookkeeper II	Swing, Kathy	1999	\$ 750
18	Assistant Branch Manager	Mellott, Cherrylyn	2006	\$ 1,000
19	Assistant Branch Manager	O'Neill, Carolyn	2008	\$ 1,000
20	Assistant Branch Manager	Hlavaty, Angela	2006	\$ 1,000
21	Assistant Branch Manager	Castille, Evelyn	1998	\$ 1,000
22	Branch Manager	Davenport, Cristina	2001	\$ 1,500
24	Assistant Branch Manager	Dabney, Sarah	2004	\$ 1,000
25	Processing Administrator	Wiley, Neena	2008	\$ 1,000
26	Training Facilitator	Holcomb, Carolyn	1997	\$ 1,000
28	Branch Supervisor	Knight, Patricia	2006	\$ 750
31	Senior Clerk	Vaughan, Nichole	2010	\$ 750
32	Senior Clerk	Luster, Kathy	2008	\$ 750
47	Field Agent	Childs, Heath	2006	\$ 750
53	Asst Dir. of Finance for Operations	Holguin, Keri	2000	\$ 1,500
54	Director of Human Resources	Dickerson, Deborah	2000	\$ 1,500
55	Assistant IT Coordinator	Hanratty, Eric	2010	\$ 750
57	Branch Manager	Allmon, Alice	2004	\$ 1,500
60	Chief Deputy Tax Collector	Moon, Vickie	2008	\$ 2,000

<b>TOTAL CURRENT DESIGNATIONS</b>	<b>\$ 42,000</b>
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### NEW DESIGNATIONS (2010-11)

POS. NO.	POSITION TITLE	EMPLOYEE NAME	DATE	PRORATED AMOUNT
58	Assistant Branch Manager	Grissom, Lindsey	2010/2011	\$ 1,000
27	Branch Supervisor	Castro, Jenny	2010/2011	\$ 750

<b>TOTAL NEW DESIGNATIONS</b>	<b>\$ 1,750</b>
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<b>TOTAL CURRENT AND NEW DESIGNATIONS</b>	<b>\$ 43,750</b>
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NOTE: TOTAL DESIGNATIONS SHOULD BE INCLUDED IN SPECIAL PAY ON SCHEDULE IA

# TRAVEL WORKSHEET

## OKALOOSA COUNTY

### LOCAL TRAVEL

**FIELD TRAVEL:**

Number of Field Personnel	Office Owned Vehicles	County Owned Vehicles	Personal Vehicles	Total Miles For Per. Vehicles	Mileage Allowance	Flat Rate/ # At Flat Rate	TOTAL
3	3						\$ 6,650

**ADMINISTRATIVE TRAVEL:\***

Number of Adm. Personnel	Office Owned Vehicles	County Owned Vehicles	Personal Vehicles	Total Miles For Per. Vehicles	Mileage Allowance	Flat Rate/ # At Flat Rate	TOTAL
10	6						\$ 5,750

\*Please note types of travel included.

**TOTAL LOCAL TRAVEL**
**\$ 12,400**

### MISCELLANEOUS TRAVEL

**SCHOOLS:**

Sponsor	City	No. Attending/ No. Days Each	Personal Vehicles	Mileage	Room Allowance	Per Diem	TOTAL
DOR TCC501	TBA	2/5		\$ 175	\$ 1,290	\$ 410	\$ 1,875
DOR TCC502	TBA	2/5		\$ 250	\$ 1,290	\$ 410	\$ 1,950
DOR TCC503	TBA	2/5		\$ 250	\$ 1,290	\$ 410	\$ 1,950
DOR TCC504	TBA	2/5		\$ 175	\$ 1,290	\$ 410	\$ 1,875
Records Management	TBA	2/2		\$ 150	\$ 400	\$ 164	\$ 714
Finance Workshop	TBA	3/2		\$ 250	\$ 600	\$ 246	\$ 1,096
DOR Cont. Ed.	TBA	3/4		\$ 250	\$ 1,800	\$ 492	\$ 2,542
Computer Training	TBA	4/3		\$ 250	\$ 1,200	\$ 492	\$ 1,942
National Tax Lien Meeting	TBA	3/2		\$ 175	\$ 600	\$ 246	\$ 1,021
Leadership Okaloosa	TBA	3/1		\$ -	\$ 328	\$ 102	\$ 430
User Group Meetings	TBA	10/4		\$ 330	\$ 4,800	\$ 460	\$ 5,590
Continuing Ed Seminars	TBA	6/1		\$ 150	\$ -	\$ 72	\$ 222
Human Resource Training	TBA	2/1		\$ 75	\$ -	\$ 38	\$ 113
FRPA Meetings	TBA	12/1		\$ 75	\$ -	\$ 144	\$ 219
Community Relations Coalitions	TBA	2/3		\$ 150	\$ 600	\$ 246	\$ 996
<b>TOTAL</b>				<b>\$ 2,705</b>	<b>\$ 15,488</b>	<b>\$ 4,342</b>	<b>\$ 22,535</b>

**CONFERENCES:**

Sponsor	City	No. Attending/ No. Days Each	Personal Vehicles	Mileage	Room Allowance	Per Diem	TOTAL
Spring TC Conf.	TBA	2/4		\$ 250	\$ 1,120	\$ 328	\$ 1,698
Fall TC Conf.	TBA	8/5		\$ 600	\$ 5,600	\$ 1,640	\$ 7,840
NACO Conf.	TBA	1/5		\$ 450	\$ 1,000	\$ 205	\$ 1,655
NACTFO Conf.	TBA	2/3		\$ 500	\$ 1,200	\$ 246	\$ 1,946
FABTO Conf.	Olando	7/5		\$ 300	\$ 2,800	\$ 1,435	\$ 4,535
IAAO Conf.	TBA	1/5		\$ 450	\$ 875	\$ 205	\$ 1,530
Drivers License Conf.	TBA	5/3		\$ 300	\$ 990	\$ 470	\$ 1,760
<b>TOTAL</b>				<b>\$ 2,850</b>	<b>\$ 13,585</b>	<b>\$ 4,529</b>	<b>\$ 20,964</b>

**OTHER:**

TYPE OF TRAVEL	Number Of Trips	Mileage	Room Allowance	Per Diem	TOTAL
LEGISLATIVE	4	\$ 350	\$ 1,000	\$ 328	\$ 1,678
GENERAL	4	\$ 350	\$ 1,000	\$ 328	\$ 1,678

**TOTAL MISCELLANEOUS TRAVEL**
**\$ 46,855**
**MOTOR POOL CHARGES**
**\$ -**
**TOTAL TRAVEL REQUEST**
**\$ 59,255**

**POSTAGE WORKSHEET  
OKALOOSA COUNTY**

Type of Mail	Number of Items	Postage Rate	Total
<b>MASS MAILINGS:</b>			
<b>TAXES:</b>			
Tax Notices / Real Property	103,720	\$ 0.44	\$ 45,637
Tax Notices / Personal Property	13,229	\$ 0.44	\$ 5,821
Reminder Notices / Real & Personal Property	16,464	\$ 0.44	\$ 7,244
Installment Notices	5,334	\$ 0.44	\$ 2,347
Informational Notice to Mortgagor	38,523	\$ 0.44	\$ 16,950
<b>TAGS AND REGISTRATIONS:</b>			
Motor Vehicles / Vessels	212,500	\$ 0.44	\$ 93,500
<b>OTHER: (Specify type)</b>			
Business Tax Receipts	18,500	\$ 0.44	\$ 8,140
Hunting / Fishing	12,500	\$ 0.44	\$ 5,500
<b>AMOUNT REIMBURSED BY COUNTY:</b>	177,270	\$ 0.44	\$ (78,000)
<b>TOTAL MASS MAILINGS</b>			<b>\$ 107,139</b>
<b>GENERAL CORRESPONDENCE</b>			
Metered Mail	117,580	\$ 0.44	\$ 51,735
Priority Mail / Certified Mail	Fluctuating	Variable	\$ 1,015
<b>TOTAL GENERAL CORRESPONDENCE</b>			<b>\$ 52,750</b>
<b>TOTAL POSTAGE REQUEST</b>	(Enter on line 4251, Column (5), Schedule II)		<b>\$ 159,889</b>

## EDUCATION WORKSHEET OKALOOSA COUNTY

### SCHOOLS

Sponsor	City	Tuition	Texts	Number Attending	TOTAL
DOR TCC501	TBA	\$ 600		2	\$ 1,200
DOR TCC502	TBA	\$ 600		2	\$ 1,200
DOR TCC503	TBA	\$ 600		2	\$ 1,200
DOR TCC504	TBA	\$ 600		2	\$ 1,200
DOR Continuing Ed.	Orlando	\$ 600		3	\$ 1,800
<b>TOTAL</b>					<b>\$ 6,600</b>

### WORKSHOPS

Sponsor	City	Tuition	Texts	Number Attending	TOTAL
Records Management	TBA	\$ 75		2	\$ 150
Columbus Day Training	TBA	\$ 50		77	\$ 3,850
National Tax Lien Meeting	TBA	\$ 150		3	\$ 450
Leadership Okaloosa	Niceville	\$ 800		3	\$ 2,400
<b>TOTAL</b>					<b>\$ 6,850</b>

### CONFERENCES AND SEMINARS

#### DATA PROCESSING\*

Sponsor	City	Tuition	Texts	Number Attending	TOTAL
Spring TC Conf.	TBA	\$ 250		2	\$ 500
Fall TC Conf.	TBA	\$ 250		8	\$ 2,000
NACO Conf.	TBA	\$ 350		1	\$ 350
NACTFO Conf.	TBA	\$ 250		2	\$ 500
FABTO Conf.	TBA	\$ 250		7	\$ 1,750
IAAO	TBA	\$ 250		1	\$ 250
TC Seminars	TBA	\$ 500		8	\$ 4,000
Drivers License Conf.	TBA	\$ 200		5	\$ 1,000
<b>TOTAL</b>					<b>\$ 10,350</b>

### OTHER

Sponsor	City	Tuition	Texts	Number Attending	TOTAL
Financial Management	TBA	\$ 150		3	\$ 450
Computer Training	TBA	\$ 250		4	\$ 1,000
Chamber Seminars	TBA	\$ 40		12	\$ 480
Continuing Ed. Seminars	TBA	\$ 147		6	\$ 882
User Group Meetings	TBA	\$ 200		10	\$ 2,000
Community Relations Coalitions	TBA	\$ 100		2	\$ 200
FRPA Meetings	TBA	\$ 15		12	\$ 180
Human Resources Training	TBA	\$ 100		2	\$ 200
<b>TOTAL</b>					<b>\$ 5,392</b>

OTHER EDUCATIONAL EXPENSES (SPECIFY)

TOTAL EDUCATION EXPENSES \$ 29,192

\*Justification must be supplied, see instruction booklet for details.



**DATA PROCESSING PURCHASE  
JUSTIFICATION  
OKALOOSA COUNTY**

ITEM REQUESTED	NUMBER REQUESTED	MAKE AND MODEL NUMBER	LENGTH OF PAYMENT SCHEDULE	COST FOR FISCAL YEAR 2010-11	FULL COST
Q Flow Software	4		1 time	\$ 75,000.00	\$ 75,000.00
Replication Server	1	DL380G6	1 time	\$ 13,500.00	\$ 13,500.00
Toughbook Laptop	2	CF-52PGNBX2M	1 time	\$ 1,500.00	\$ 3,000.00

Check one below:

REPLACEMENT OF EXISTING EQUIPMENT 2 laptops

ADDITIONAL EQUIPMENT \_\_\_\_\_

STATEMENT OF NEED: To include but not be limited to age, condition, response time, etc. of existing equipment.

Q Flow - numbering system used to manage customers. This software assigns a number to a customer based on customer need. Also tracks the amount of time each clerk takes to process a transaction. This purchase, along with the prior year purchase, will complete the system.

Replication Server - this equipment compliments the prior year's purchase as a secondary domain controller and acts as a backup if the primary were to crash.

Toughbook Laptop - Field Staff laptops are 4 years old and running XP. Upgrade is needed and a rugged laptop required for vehicle service while running on dirt roads in north end of county.

HOW LONG WILL THIS PURCHASE FULFILL THOSE NEEDS?

Q Flow - 5 years

Replication Server - 6 years

Toughbook Laptop - 4 years

ADDITIONAL COMMENTS OR PERTINENT INFORMATION

NOTE: A comprehensive plan should be submitted for continuation of, or updates to systems being purchased or previously purchased by your office. This includes systems co-owned with another office in your county. This plan should include initial equipment, year of acquisition and a proposed schedule by year of enhancements to be reflected in future budgets.

73 Eglin Parkway NE, Suite 111  
Fort Walton Beach, FL 32548

101 James Lee Boulevard  
Crestview, FL 32536

506 Highway 85 North  
Niceville, FL 32578



4012 Commons Dr. West, Unit 122  
Destin, FL 32541

310 Van Matre Ave.  
Suite 155, Building 210  
Eglin AFB, FL 32542

(850) 689-5700 (850) 651-7300

**CHRIS HUGHES**  
**OKALOOSA COUNTY TAX COLLECTOR**  
[www.okaloosatax.com](http://www.okaloosatax.com)

## Comprehensive Plan

The Okaloosa County Tax Collector's office operates in a RedHat Linux, MySQL database with XP workstations. Currently, the software used on the server is provided by Grantstreet Group TAXSYS(tax software). We are currently using web based software for the collection and distribution of Taxes.

We are in the process of upgrading 72 aging computers that are still running Windows XP SP2, as well as incorporating shared interfaces into FRVIS and Drivers License with TaxSys using Payment Express, Renew Express(Motor Vehicle renewal), and Deed Express. Our county was the first to have online Tax Certificate sales and also will be the first to offer vehicle online renewal at the county level.

### 2010-2011

Purchase replacement laptop for the Field Staff department

Purchase replication server

Update Antivirus

Continue training regimen for IT department

Correct deficiencies found in IT Audit

Purchase Office 2007 for additional employees acquired for DL transition

Purchase Exchange backup agent

Upgrade Intranet (Sharepoint 2007)

## 2011-2012

Purchase replacement laptops for the management staff

Update Antivirus

Continue training regimen for IT department

Purchase Office 2010

Website redesign

Upgrade Spam filter

Upgrade to Exchange 2010

Upgrade latest server OS

Replacement of receipt printers on counters

## 2012-2013

Upgrade main Tax Database Servers

Upgrade aging 3in1 printers for PR/Personnel Assistant and Director of Operations

Replace HP4100 printers, will be 10 years old at this time

Update Antivirus

Continue training regimen for IT department

Replace HP8150 BTR Printer, will be 8 years old at this time

# CHRIS HUGHES

Okaloosa County Tax Collector

Organizational Chart / DOR / FY 2011

Chief Deputy Tax Collector

Assistant Tax Collector

Executive Assistant

Director of Finance

Director of Operations

Director of Licenses & Taxes

Assistant Dir of Finance Collections

Assistant Dir of Finance Operations

Director of Human Resources

Director of Community Relations

Bookkeeper II

Chief Technology Officer

Tax Administrator

Field Staff Manager

Supt of Maintenance

Assistant IT Coordinator

Senior Clerk

Field Agent

Crestview Branch Manager

FWB Branch Manager

Eglin Branch Manager

Niceville Branch Manager

Destin Branch Manager

CSC Branch Manager

Training Facilitator

Processing Administrator

Manager

Manager

Assistant Branch Manager

Assistant Branch Manager

Assistant Branch Manager

Assistant Branch Manager

Assistant Branch Manager

Assistant Branch Manager

Supervisor

Supervisor

Supervisor

Supervisor

Supervisor

Senior Clerk

Senior Clerk

Senior Clerk

Senior Clerk

Senior Clerk

Clerk

Clerk

Clerk

Clerk

Clerk

Clerk

Clerk

DETAIL OF VACANT POSITIONS

Pos. No.	Position Classification	Annual Rate 9/30/10	# Days Vacant
<p>This page left intentionally blank</p>			

*\* Please insert additional lines if necessary.*



SUMMARY OF  
REDUCTION REQUEST

APPROPRIATION CATEGORY	APPROVED BUDGET 2009-10	BUDGET REQUEST 2010-11	Reductions Requested by the COUNTY		Reductions Reflected in REQUEST	
			AMOUNT	%	AMOUNT	%
PERSONAL SERVICES (Sch. 1-1A)	4,186,612	4,768,203	0	0.0%	581,591	13.9%
OPERATING EXPENSES (Sch. II)	1,171,633	1,160,126	0	0.0%	(11,507)	-1.0%
OPERATING CAPITAL OUTLAY (Sch. III)	105,000	199,500	0	0.0%	94,500	90.0%
<b>TOTAL EXPENDITURES</b>	<b>\$5,463,245</b>	<b>\$6,127,829</b>	<b>\$0</b>	<b>0.0%</b>	<b>\$664,584</b>	<b>12.2%</b>
<b>NUMBER OF POSITIONS</b>	<b>68</b>	<b>81</b>	<b>0</b>	<b>0.0%</b>	<b>13</b>	<b>19.1%</b>

*\* Please use the second tab to clarify any deviation in the reductions requested by the county and the reductions reflected in this request.*

## Keri Holguin

---

**From:** James Taylor [jtaylor@co.okaloosa.fl.us]  
**Sent:** Tuesday, July 20, 2010 8:39 AM  
**To:** 'Keri Holguin'  
**Cc:** Krystal King  
**Subject:** RE: Quote for Workers Comp

Keri,

Below is this year's wc numbers for the Tax Collector.

James

9410	<b>TAX COLLECTOR</b>	\$272,329.00	\$7,597.98
8810	<b>TAX COLLECTOR</b>	\$2,899,032.00	\$7,537.48
			<b>\$15,135.46</b>

**From:** Keri Holguin [mailto:kholguin@okaloosatax.com]  
**Sent:** Monday, July 19, 2010 2:35 PM  
**To:** James Taylor  
**Subject:** Quote for Workers Comp

Mr. Taylor,

Could you please provide me with the amount for the Tax Collectors' portion of workers compensation for FY 10/11? I need this information to finish preparing our budget.

Thank you,

*Keri Holguin*

Assistant Director of Finance for Operations  
Okaloosa County Tax Collector's Office  
73 Eglin Parkway NE, Suite 201  
Fort Walton Beach, FL 32548  
(850) 651-7692  
(850) 651-7614 fax



## CONTRIBUTION RATES EFFECTIVE JULY 1, 2010

Employer contribution rates are set by law. Rates below (except IFAS rates) include the appropriate retirement contribution rate, 1.11% HIS contribution rate, and 0.03% administrative/educational fee.

<b>FRS Membership Plan &amp; Class</b>	<b>Total Employer Contribution</b>
<i>(Rates below apply to Florida Retirement System members who are in either the FRS Pension Plan or the FRS Investment Plan)</i>	
HA/PA – Regular	10.77%
HB/PB – Special Risk	23.25%
HC/PC – Judges	21.79%
HE/PE – Legislators	16.34%
HG/PG – Gov./Lt. Gov. & Cabinet	16.34%
HH/PH – State Atty./Public Defender	16.34%
HI/PI – County, City, Sp. Dist. Elect. Offc.	18.64%
HJ/PJ – Special Risk Adm. Support	13.24%
HM/PM – Senior Management (SMSC)	14.57%

<b>IFAS Supplemental Retirement Plan<sup>3</sup></b>	<b>Contribution<sup>4</sup></b>
HK – IFAS Supplemental	18.75%

<b>Renewed Membership Plan &amp; Class<sup>2</sup></b>	<b>Total Employer Contribution</b>
<i>(Rates below apply to renewed members in either the FRS Pension Plan or the FRS Investment Plan, including renewed members in the EOC &amp; SMSC, as well as renewed EOC members who elected to join SMSC)</i>	
RA/QA – Regular	10.77%
RC/QC – Judges	21.79%
RE/QE – Legislators	16.34%
RG/QG – Gov./Lt. Gov. & Cabinet	16.34%
RH/QH – State Atty./ Public Defender	16.34%
RI/QI – County, City, Sp. Dist. Elect. Offc.	18.64%
RM/QM – Senior Management (SMSC)	14.57%
RP/QP – <i>SMSC in lieu of EOC:</i>	
Judges	14.57%
Legislators	14.57%
Gov./Lt. Gov. & Cabinet	14.57%
State Atty./Public Defender	14.57%
RQ/QQ – <i>SMSC in lieu of EOC:</i>	
County, City, Sp. Dist. Elect. Offc.	14.57%

<b>Teachers' Retirement System<sup>3</sup> (TRS)</b>	<b>Total Employer Contribution</b>
IA – TRS Plan A	Individual Rates
IB – TRS Plan B	"
IC – TRS Plan C	"
ID – TRS Plan D	"
IE – TRS Plan E	11.35%
IF – TRS Plan E (plus Social Security)	11.35%

<b>State and County Officers and Employees' Retirement System<sup>3</sup> (SCOERS)</b>	<b>Total Employer Contribution</b>
AA – Division A	11.10%
AB – Division A, High Hazard	11.10%
AD – Division B	9.10%
AE – Division B	9.10%
AF – Division B	9.10%
FK – Division A (plus Social Security)	11.10%

<b>EOC Members who Elect to Join SMSC</b>	<b>Total Employer Contribution</b>
HP/PP – Judges	14.57%
Legislators	14.57%
Gov./Lt. Gov. & Cabinet	14.57%
State Atty./Public Defender	14.57%
HQ/PQ – County, City, Sp. Dist. Elected Offc.	14.57%

<b>Deferred Retirement Option Program (DROP)</b>	<b>Total Employer Contribution<sup>5</sup></b>
DP – DROP from FRS	12.25%
DR – DROP from Plan A, SCOERS	12.25%
DS – DROP from Plan B, SCOERS	12.25%
DT – DROP from TRS, all plans	12.25%
DE, DF, DG, DH – DROP terminated in EOC	1.11% <sup>6</sup>

<sup>2</sup> See chart at the bottom of page two of this attachment for rates for retirees initially reemployed on or after July 1, 2010, who are not eligible for retirement coverage.

<sup>3</sup> Member contribution rates did not change in FY 2010/11 for IFAS, TRS or SCOERS.

<sup>4</sup> The 1.11 percent HIS rate and 0.03 percent administrative/educational fee do not apply to members in IFAS.

<sup>5</sup> The DROP rate includes the 1.11 percent HIS rate but the 0.03 percent administrative/educational fee does not apply to DROP participants.

<sup>6</sup> Only the HIS rate is owed on the salaries of these elected officials.

## Excluded Payments

The following is a list of payments on which retirement contributions should not be reported or certified on this form.

1. Lump sum payments for accumulated sick leave.
2. Bonus payment paid on or after July 1, 1989. Bonuses include, but are not limited to, the following types of payments:
  - \* Longevity payments
  - \* Race Track bonuses
  - \* Christmas bonuses
  - \* Exit bonuses
  - \* Severance pay
  - \* Salary increases granted because an employee has agreed to retire, even when such increases are paid over several months or years prior to retirement as is the practice of some district school boards
  - \* Payments for accumulated overtime, compensatory time, reserve time or holiday time worked, if not made within 11 months of the month in which the work was performed
  - \* Quality Instruction Incentives Program (QUIP) Payments
  - \* Lump sum payments in recognition of employee's accomplishments
3. Accumulated annual leave in excess of 500 hours.

Retirement contributions are due for lump sum payments for accumulated annual leave, including general or consolidated leave which is used for both vacation and sickness. However, if a single lump sum payment exceeds 500 hours, **only a maximum of 500 hours** is to be certified and reported with the retirement contributions.

Office of the Okaloosa County Tax Collector

OCTC REGULATION #130

Effective: 1/04/93

**AWARDS FOR SUPERIOR ACCOMPLISHMENTS  
AND ADOPTED SUGGESTIONS**

**I. Purpose.** This regulation establishes policy and procedures to recognize employees who make exceptional contributions to the efficiency, economy and otherwise improvement in the operations of Okaloosa County Tax Collector's Office.

**II. Policy.** An OCTC Awards Program is hereby implemented to recognize the superior and meritorious achievement adopted by employees. The OCTC desires to keep its employees motivated to increase productivity and morale by rewarding those who make such a contribution. Awards can be given to an individual or as a group for above average job performance or the creation of a resource saving technique.

**III. Procedures.**

A. OCTC Awards Committee. On or before November 1, the Tax Collector shall establish an Awards Committee consisting of one representative from each satellite office. The Tax Collector or designee shall serve as committee chair.

1. The committee will meet as necessary to review any recommendations for awards.
2. Members may be reappointed at the discretion and pleasure of the Tax Collector. The Asst. Tax Collector shall serve as a permanent non-voting member and shall provide technical assistance to the Committee as well as assisting in the development and maintenance of the awards program.

B. Management. Management officials at all levels must actively participate in the Awards Program as a part of their daily management responsibilities. They must encourage employees to participate by striving for improvement in job performance, and by making contributions or suggestions that lead toward more efficient and economically improved operations.

C. Supervisors. Supervisors must support the program and participate in it on a continuing basis by:

1. Educating employees on the program and creating interest by providing a work environment conducive to soliciting proposals for improvement and encouraging performance at the highest level.
2. Reviewing employee performance to determine whether the employee warrants consideration under the provisions of this program.

3. Submitting recommendations for awards for superior performance or meritorious service by employees under their supervision.

D. Types of Awards and Criteria. There are two categories of awards; honor and cash.

1. Honor awards may take the form of a medal, plaque, wall certificate, or letter of commendation and are awarded to recognize employees for:

- a. Distinguished, career oriented achievements which reflect exceptional contributions to the OCTC.
- b. Significant contributions that benefit the OCTC's service to the public.

2. Cash awards are usually awarded to individual employees for sustained superior performance or for a one time special act or service in the public interest, connected with, or related to, official employment, or for ideas/suggestions which are adopted and placed in effect that will result in eliminating or reducing waste in government or improving operations.

- a. To be eligible for a cash award for a meritorious act or superior accomplishment, an employee shall normally have completed 12 months of satisfactory service within the OCTC's Office.
- b. A Safety Award may be conveyed periodically to an employee who has performed outstanding service or made a significant contribution of unusual value in the promotion of accident loss prevention for the OCTC.

3. Employees may participate in the Certification Incentive Program on a voluntary basis, as approved by the Tax Collector.

- a. Department of Revenue (DOR) Certification courses will only be attended by a deputy, at the Tax Collector's discretion.
- b. In order to receive certification pay, a deputy must be employed for two years and must receive his/her Certified Florida Collector Assistant (CFCA) certification card as approved by the DOR board.
- c. Certification pay is based on the following scale:

1. Department Head	\$2,000.00
2. Manager	\$1,500.00
3. Assistant Manager	\$1,000.00
4. Clerk	\$ 750.00

d. All certification monies will be disbursed the pay period preceding Thanksgiving unless certification is granted after that date. In such case, certification monies will be disbursed on or before September 30, annually.

e. Certification money will be paid annually as long as the employee continues his or her employment.

E. Recommendations/Nominations for Awards. Any employee may recommend another employee for an award to the office's Awards Committee member.

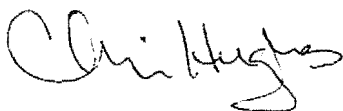
1. Nominations for awards may be handwritten or typed and must include justification for the award with an explanation of the service rendered.
2. The individual nominating should show how the employee's activities significantly differed from that of any other employee given the same situation and/or circumstances.
3. In the event the Awards Committee has a substantial difference of opinion then the Tax Collector or his designee (serving as Chairperson) shall make final determination.

F. Other Awards.

1. Letters of Appreciation are encouraged and may be conveyed, at any time, by supervisors to express appreciation to an employee or group of employees for their work performance, acts or services which exceed that normally experienced or expected.

**BY DIRECTION OF THE TAX COLLECTOR:**

Signature



**Date:** May 27, 2005

**Revised:** 5/05, 9/99

**Reviewed:** 5/05, 10/00,  
9/99, 2/97

## Okaloosa BOCC 2010 BCBS Renewal

Estimated Renewal Pricing  
Presented by Barnes Insurance

### Base Plan 1351

Employee Rate \$688.34

Estimated Current Premium	(\$688.34 X 811 X 12)	\$6,698,924.80
Current Employee Contribution \$40	(\$40 X 811 X 12)	\$389,280.00
Estimated Current Total		<b>\$6,309,644.80</b>

### Renewal Base Plan 1351

Estimated Employee Premium \$804.67

Estimated Renewal Premium	(\$804.67 X 811 X 12)	\$7,831,048.40	16.9% Increase
Current Employee Contribution \$40	(\$40 X 811 X 12)	\$389,280.00	
Estimated Renewal Total		<b>\$7,441,768.40</b>	(\$1,132,123.60 Increase)

### Renewal Alternate Base Plan 3769

Estimated Employee Premium \$752.03

Estimated Alternate Premium	(\$752.03 X 811 X 12)	\$7,318,755.90	9.2% Increase
Current Employee Contribution \$40	(\$40 X 811 X 12)	\$389,280.00	
Estimated Alternate Total		<b>\$6,929,475.90</b>	(\$619,831.10 Increase) (\$512,292.50 less than Plan 1351)

**\*Totals are Employer Contribution. Does not consider employee contribution.**

**\* Based on an average of 811 contracts**

**\* BlueMedicare is a 1-1 AD.**

**III. TEMPORARY POSITION**

*[Applicable to all employees of covered agencies]*

For State Agencies      A temporary position in a state agency is an employment position, which is compensated from an OPS account as provided in s. 216.011(1)(dd), F.S.

For Local  
Agencies

A temporary position in a local agency is:

- An employment position which will not exist beyond six consecutive calendar months (see page 1-11 for information on positions extended beyond six months); or
- An employment position listed below, regardless of whether it will exist beyond six consecutive calendar months:
  1. **Student Positions** — positions filled by persons who are bona fide students in an accredited educational or vocational program and who perform service for a public employer in a temporary position set aside strictly for students. The position cannot be filled by anyone other than a student.
  2. **Work-Study Positions** — positions filled by students participating in the Federal work-study program.
  3. **Temporary Instructional Positions** — positions established with no expectations of continuation beyond one semester or trimester at a time for persons to teach in a community college, public school, or vocational institution; such positions may include paper graders, tutors, note takers, and lab tutors at community colleges.
  4. **Substitute Teacher Positions** — positions filled by persons who are not on contract and who are called to work intermittently to substitute teach.
  5. **On-Call Positions** — positions filled by employees who are called to work for brief periods and whose work ceases when the work is completed. (If an employee has a work schedule and works consistently month after month, he/she is considered to be filling a regularly established position and should be enrolled in the FRS from the date of employment.)
  6. **CETA and JTPA Positions, and “Enrollees” of the Senior Community Service Employment Program** — positions provided for in rule 60S-1.004(4)(c)7.a. and 8.a., F.A.C.
  7. **Non-salaried Elective Positions** — elective office positions in which the elected officials receive no compensation, but receive expenses, such as per diem, a stipend, or an honorarium.
  8. **Temporary Non-instructional Community College Positions** — effective July 1, 1991, non-instructional positions filled by employees paid from an OPS budget account for not more than 2,080 hours of total service within a single community college. (Any such person who is employed beyond 2,080 total aggregate hours within a community college shall thereafter be an employee filling a regularly established position and a compulsory member of the FRS regardless of the budget from which he/she is paid.)



For Local  
Agencies,  
cont'd

9. **Temporary Emergency Positions** — positions established on a temporary basis as a result of a state of emergency as declared by the Governor due to a disaster caused by destructive storms, winds, floods fires, earthquakes, freezes, or other similar emergencies.
10. **Foreign Exchange Teachers** — instructional positions in grades K-12 filled by exchange teachers on a J-1 visa when participating in an exchange visitor program designated by the United States Department of State.

Records documenting the intended length of a temporary position and the dates of employment of an employee in such position must be maintained by the agency.

When an employment position is extended beyond six consecutive calendar months, with the exception of positions described under items 1 through 10 above, it becomes a regularly established position. You should enroll the employee and all subsequent employees in the FRS and begin to make necessary contributions on the first day of the 7<sup>th</sup> calendar month or on the first day of the month following the month in which the decision is made to extend the position beyond six months, if earlier. When a temporary position extends beyond the six months and there is no documentation substantiating that the position was originally established as a temporary position to last for six months or less, the employee filling such position will be enrolled from the initial date of employment, and retirement contributions shall be due retroactively to that date.

If you have questions concerning an employee's eligibility for membership in the FRS, please contact the Enrollment Section of the Bureau of Enrollment and Contributions. Outside the Tallahassee local calling area, you may reach this section toll-free at (877) 377-3675. Otherwise, you may reach this section by phone at (850) 488-8837, or you can contact this section by e-mail at: [enrollment@dms.MyFlorida.com](mailto:enrollment@dms.MyFlorida.com).

**STATUTORY REFERENCE:**

Section 121.021(11), (12), (52) and (53), F.S.

**FRS RULE REFERENCE:**

Section 60S-1.004(4) and (5), F.A.C.