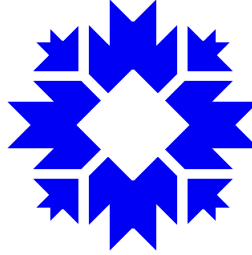


# **City of Bloomington Common Council**

## **2024 Jack Hopkins Social Services Funding Program Applications**

**Inclusive of Memo from Staff, Application Summaries, and Original  
Submissions**



**AGENDA - 2024 JACK HOPKINS SOCIAL SERVICES FUNDING COMMITTEE**

**FIRST REVIEW OF APPLICATIONS**

**16 April 2024 - 6:00 pm**

This meeting will be held in the Allison Conference Room (Suite #225, City Hall, 401 N. Morton) and may also be accessed electronically via Zoom at the following link:

<https://bloomington.zoom.us/j/88555995894?pwd=tsPUORZ1x3qEgntfSQ2aViAbERSaiN.1>

- I. WELCOME**
- II. DISCLOSURES OF CONFLICTS OF INTEREST**
- III. REVIEW OF APPLICATIONS**
  - Determine which agencies to invite to present to the Committee
  - Of those agencies invited, develop any questions the Committee wishes the agency to address in the course of its presentation
  - Of those agencies *not* invited to present, develop a clear statement re: why
- IV. OTHER BUSINESS**
- V. NEXT STEPS - JACK HOPKINS 2024 SCHEDULE *BOLD FIELDS* = Committee meeting**

**APRIL**

**23<sup>rd</sup> (Tuesday, 5:30pm)**

**Agency Presentations**

**MAY**

**1<sup>st</sup> (Wednesday)**

Committee Members submit recommended allocations and comments.

Please note: Each Committee members' recommended allocations and comments will be shared with the rest of the Committee and participating staff.

**3<sup>rd</sup> (Friday)**

Council staff turns around compiled recommended allocations and comments to the Committee and participating staff.

**9<sup>th</sup> (Thursday, 6:00 pm)**

**Pre-Allocation Meeting**

**14<sup>th</sup> (Tuesday, 6:00 pm)**

**Allocation Hearing**

**23<sup>rd</sup> (Thursday, 6:00 pm)**

**Debriefing Meeting**

**JUNE**

**Early June**

Agencies sign funding agreements

**12<sup>th</sup> (Wednesday, 6:30 pm)**

Council action on recommendations

**18<sup>th</sup> (Tuesday, 9:00 am)**

HAND Technical Assistance Meeting

- VI. ADJOURNMENT**





City Hall  
401 N. Morton St.  
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Bloomington, Indiana 47402

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**To: Members of the 2024 Jack Hopkins Social Services Committee**  
**From: Council Office**  
**Re: Applications for 2024 Jack Hopkins Social Services Funding**  
**Date: 12 April 2024**

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Included herein, please find all applications for the 2024 Jack Hopkins Funding Cycle. Please recall that the Committee will meet in person at City Hall, in the Allison Conference Room (#225) and via [Zoom](#) on **Tuesday, 16 April at 6:00 pm** to review all applications. If any Committee members intend to participate remotely, please notify staff ahead of time. The focus of the meeting will be to examine each application, determine from which agencies the Committee wishes to hear further, and of the agencies invited to present to the Committee, identify any questions the Committee wishes the agencies to answer in the course of their presentations. Committee members should also be prepared to disclose any conflicts of interest at this meeting. See below for guidance.

This year, 38 agencies submitted timely applications for funding. The request for applications was issued on 04 March and applications were due by 01 April at 4pm. A Technical Assistance meeting was held in person at City Hall in the Allison Conference Room and via Zoom on 18 March, with approximately 17 participants in attendance.

As is typical, the requests for funding exceed the appropriated money the Jack Hopkins Committee has available to allocate. Collectively, the **requests total \$614,067.36**. This year, the **Committee has \$350,000 to distribute** – approximately \$264,000 less than the total requested by all agencies. Because unused amounts from past funding cycles go back into the Jack Hopkins non-reverting fund, there may be additional funds available. Should the Committee wish to recommend allocation of *additional* available monies, including reverted 2023 monies, know that the Committee will need to ask the Mayor for an appropriation ordinance to do so. In the past, the Controller’s Office has recommended that the Committee make such a request only after it makes its funding determinations.

In reviewing the application material, Committee members are encouraged to review not only the application summaries, but also the original submissions. The original submissions include information not captured in the summaries, such as detailed project budgets, written estimates (where applicable), balance sheets, etc. Note also that the Hopkins application itself includes an “Other” field where agencies can further elaborate on their request. This field is not included in the summary sheet and often provides instructive context.

### **Conflicts of Interest**

In the interest of the April 16<sup>th</sup> meeting, please be prepared to disclose any special relationships that you, your spouse, or dependents may have with any of the agencies seeking funding. The term “special relationship” is vague, but is intended to include those relationships that would undermine the public (and agencies’) confidence in the process, if left undisclosed. In the past, members of the Committee have disclosed those relationships at the initial review of applications, declared their intent to participate fairly, objectively and in the public interest given this relationship, and have participated in the relevant votes. The Committee may adopt other restrictions on participation at this meeting.

If any member has a pecuniary interest in, or derives a profit from, one of any of the current applications, then they must declare the conflict, refrain from voting and deliberating on the subject proposal, and complete a State-proscribed conflict of interest form to be filed by staff. Failure to do so is a Level 6 Felony. I.C. § 35-44.1-1-4. A public servant has a pecuniary interest in a contract or purchase if the contract or purchase will result in, or is intended to result in, an ascertainable increase in the income or net worth of the public servant or a dependent of the public servant who is under the direct or indirect administrative control of the public servant; or receives a contract or purchase order that is reviewed, approved, or directly or indirectly administered by the public servant.

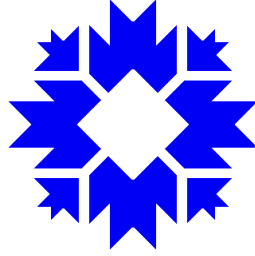
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**TOTAL REQUEST (All applications)**

**\$614,067.36**



**City of Bloomington  
Office of the Common Council**

Jack Hopkins 2024

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Application Summaries

# APPLICATION SUMMARY

Name of Lead Agency:

Alexandra's Army

Name of Project to be Funded:

2024 Technology Training & Upgrades

Amount Requested:

\$6150

Number of City Residents Served:

All 86,000 of Bloomington's residents are indirectly served

Number of Employees:

Full-Time	Part-Time	Volunteers
		200

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Alexandra's Army recruits and trains kids to perform neighborhood food drives in order to help end local food insecurity. Additionally, the organization provides leadership development opportunities to local youth.

Project Synopsis:

One-time request for funding in order to obtain website maintenance training, professional development required to become more self-sustainable. Also, to secure matching funds in order to have a mobile app developed so we can grow the organization and impact more of Bloomington's community, in hopes to end local hunger.

Need Addressed: (i.e. food, shelter, childcare)

Dual addressed roles: Food Insecurity and Youth Development

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
1. Website Maintenance Training	\$ 2950
2. Mobile App Development	\$ 6000
3. Purchase of Chromebooks	\$ 700
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$ 6150</b>
<b>Total Project Cost</b>	<b>\$ 9650</b>

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## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount

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### **Staff Comments:**

First-time applicant for Jack Hopkins funding. Application seems to be missing the even-numbered pages – the Committee may want to ask for any missing information (agency contact information, total clients served by project, project location, etc). Application summary states that the project will serve all 86,000 city residents – the Committee may want a more precise figure.



# APPLICATION SUMMARY

Name of Lead Agency:

**All-Options**

Name of Project to be Funded:

**All-Options Hoosier Diaper Program**

Amount Requested:

**\$7,500**

Number of City Residents Served:

**1500**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
13 (org-wide) 2 locally	1	50 (org-wide) 10 locally

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

All-Options provides judgment-free and unbiased support to people in all their experiences with pregnancy, parenting, abortion, and adoption. We use direct service and social change strategies to ensure that every person can make the reproductive decisions that are right for them, and to work toward for the compassionate and just future we all deserve.

Project Synopsis:

Since 2015, the All-Options Hoosier Diaper Program has been striving to meet the overwhelming, often overlooked need for diapers and diapering supplies for local families with infants and toddlers who are struggling to make ends meet. Our goal is to provide diapers (both cloth and disposable) to keep little ones clean, dry, and healthy, while also supporting families in increasing their economic stability and being able to parent with dignity. We have witnessed and experienced a more than 100% increase in local diaper need, yet we have worked to improve our efficiency, paring down our expenses while continuing to fundraise and seek funding from several sources. Early in 2024, we launched the first ever local Potty Training Support Program, which is intended to aid families in navigating their little ones' transition out

of diapers. We hope to continue this momentum and provide more robust support for the whole family, to include a wider range of hygiene and self-care supplies.

**Need Addressed:** (i.e. food, shelter, childcare)

health care, child care, public health, basic needs.

**Type of Funding Sought:** (check all that apply)

Capital Investment

**Operational Funds**

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Because we are able to purchase in bulk and through a national diaper bank network, \$3000 would cover 1 month of diapers & wipes for 150 local families.	\$3,000
2. Ongoing support & supplies for potty training support program	\$500
3. Menstrual Hygiene Support (pads, tampons, reusable pads or cups)	\$1500
4. Hygiene supplies - shampoo, soap, lotion, deodorant, toothbrushes, toothpaste	\$2500
<b>Total Requested</b>	<b>\$7,500</b>
<b>Total Project Cost</b>	<b>\$40,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2016	Granted	To Purchase disposable diapers and wipes for the All-Options Diaper Bank	\$8,400
2017	Granted	To purchase diapers and wipes for the Hoosier Diaper Bank	\$12,000
2018	Withdrawn	Baby boxes	\$0
2019	Denied	Hoosier Diaper Program	\$4,000
2020	Granted	Essential supplies for local families	\$4,450
2021	Granted	Mobile diaper distribution Program	\$3,940
2022	Granted	Period Equity Program	\$4,000
2023	Granted	Hoosier Diaper Program	\$6,900

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### **Staff Comments:**

Applicant lists several other expected sources of project funds, some confirmed, some pending. The Committee may wish to ask whether an award of Jack Hopkins funding will help secure any other additional sources of funding.

# APPLICATION SUMMARY

Name of Lead Agency:

Amethyst House, Inc.

Name of Project to be Funded:

Residential Upgrades

Amount Requested:

\$19,165

Number of City Residents Served:

125

Number of Employees:

Full-Time	Part-Time	Volunteers
14	20	7

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Amethyst House provides a foundation for recovery by partnering with individuals, families and communities impacted by substance-use disorders, offering high-quality residential and outpatient treatment services and guidance for healthy living.

**Project Synopsis:**

We plan on refurbishing the windows at our Women's location since it is a historical property. We also want to replace the carpet at the Men's house that covers the stairs, the hallway on the 2<sup>nd</sup> floor and the residential bedrooms.

**Need Addressed:** (i.e. food, shelter, childcare)

Shelter, healthcare

**Type of Funding Sought:** (check all that apply)

- Capital Investment
- Operational Funds
- Bridge Funding
- Pilot Project
- Collaborative Project
- Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Window refurbishment	\$28,350
2. Carpet replacement	\$12,815
3.	
4.	
5. Leveraged funds	\$22,000
6.	
<b>Total Requested</b>	<b>\$19,165</b>
<b>Total Project Cost</b>	<b>\$41,165</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1995	Denied	Start-up funds, office equipment and furnishings	\$0
1997	Denied	Transitional Housing for men and women	\$0
1999	Granted	New Van	\$10,000
2000	Granted	Rebuild foundation of Women's facilities	\$7,500
2001	Denied	Phone, voicemail, computer networking	\$0
2002	Granted	To help rebuild and expand men's facility by restoring the historic façade	\$20,000
2003	Granted	To purchase and install a stairway elevator at Men's House facility	\$4,521
2006	Granted	To pay for property and liability insurance, utilities, food, and salaries needed to operate the Men's House at 215 North Rogers	\$8,000
2010	Granted	To replace vinyl and carpet flooring in, and purchase three dishwashers for, the Men's and Women's houses	\$7,860
2011	Granted	To purchase and install washers and dryers for men's and women's half-way houses.	\$4,000
2012	Granted	Bathroom renovation	\$3,775
2013	Granted	To renovate the roof at the men's facility 3/4 - way facility and to renovate the chimney at the women's residential facility	\$9,090
2014	Granted	To purchase mattresses for all three transitional housing locations; to renovate Men's Halfway House bathroom; and, purchase an energy efficient refrigerator for the Women's Halfway House.	\$9,238.03
2015	Granted	To upgrade and improve the Men's Three-Quarter (3/4) Way House, and new chairs for the Men's Halfway House	\$19,000
2016	Granted	To pay for tree removal at both the Men's House and at the Women's House and for the replacement of the retaining wall	\$13,500

2017	Granted	Replacement of two refrigerators, repair and refinishing of wooden floors, a retaining wall and repainting of floor	\$20,350
2018	Granted	Expand and Renovate therapeutic space at men's house	\$16,758
2019	Granted	Expand case managers office to increase capacity, flooring for therapeutic space and energy efficient AC unit	\$15,000
2020	Granted	Upgrades to Men's and Women's Houses	\$18,000
2020	Granted	Residential Bridge Funding	\$13,000
2021	Granted	Upgrade Women's Residential Facility and paint the Women's House	\$21,800
2022	Granted	Foundation repair and removal of the side entrance into the crawlspace at the Men's House and install water drainage along the foundation of the Women's House.	\$18,000
2023	Granted	Maintenance and remodeling resident bedrooms at Women's House	\$12,857

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**Staff Comments:**

Committee may want to clarify the potential timeline for applicant to receive a certificate of appropriateness from the HPC for the window refurbishing project. May also want to ask whether Jack Hopkins funding will help secure any other pending grant funds.

# APPLICATION SUMMARY

Name of Lead Agency:

Beacon, Inc.

Name of Project to be Funded:

**Program Essentials for People in Poverty**

Amount Requested:

**\$31,617.81**

Number of City Residents Served:

**1600**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
25	7	400

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Beacon is a solutions-driven, antipoverty organization, dedicated to aiding and empowering people experiencing extreme poverty, especially hunger and homelessness.

Project Synopsis:

Beacon requests \$31,617.81 for essential equipment to sustain our day center (Shalom Center), hunger relief program (Phil's Kitchen), and our overnight shelter (Friend's Place), in order to provide effective and life-saving services for people experiencing extreme poverty.

Need Addressed: (i.e. food, shelter, childcare)



Shelter and food

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	12 locker sets and 72 locker locks (plus shipping)	\$12,258.95
2.	Oven (plus shipping)	\$9,606.50
3.	Refrigerator (plus shipping)	\$4,836.50
4.	12 mattresses (plus shipping)	\$2,748.06
5.	32 chairs (plus shipping)	\$2,167.80
6.		
<b>Total Requested</b>		<b>\$31,617.81</b>
<b>Total Project Cost</b>		<b>\$31,617.81</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2003	Granted	Pay for six phone sets and install three new phone lines at its 219 East 4th Street facility	\$1,900
2004	Granted	To pay for a part-time Food Service Coordinator to expand its breakfast & lunch program	\$5,500
2005	Granted	Vertical lift for Shalom Center annex at 110 S. Washington St.	\$9,000
2006	Granted	To purchase a communication system and a technology system network that includes both server and software to be installed at 110 South Washington, Bloomington, Indiana	\$7,809.18
2007	Granted	To purchase and install a three-compartment deep well sink and convection oven for the Shalom Community Center	\$5,450
2008	Granted	To purchase and install food service equipment for the Shalom weekday food program	\$11,030
2009	Granted	To purchase food as well as kitchen and miscellaneous supplies	\$18,000
2010	Withdrawn	Emergency Hunger Relief	\$0
2011	Granted	To pay for renovations to expand facility at 620 S. Walnut	\$19,000
2012	Granted	A safer and savvier Shalom	\$15,794
2012	Denied	Homeless case manager	\$0
2013	Granted		\$20,900
2014	Granted	To pay for the following components of the Homelessness Assessment & Information Systems initiative: a server, laptops and accessories, computer upgrades, software, guest Wi-Fi, dual monitors, and installation costs of all the aforementioned.	\$12,996.14
2015	Granted	To purchase 4 washers, dryers, and PureWash systems to allow us to continue to provide laundry services	\$6,800
2016	Granted	To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place	\$25,000
2017	Granted	To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place	\$29,106

2017	Granted	To purchase Chromebook computers and internet access for residents and Staff support	\$27,949
2018	Granted	Phone System	\$13,740
2018	Granted	Crawford Homes II Housing First Program	\$10,800
2019	Granted	Water-efficient toilets, washer and dryers and freezer	\$12,502
2019	Granted	Fingerprint locks	\$8,498
2020	Granted	20th Anniversary Upgrade	\$21,000
2020	Granted	Shalom Covid Response	\$17,500
2021	Granted	Rent and utility support for up to 200 households	\$25,000
2022	Granted	Housing Fast - providing quick access to the major financial barriers to finding a new home: application fees and security deposits.	\$18,750
2023	Granted	Smorgasbord for Shalom to fund equipment and goods to improve kitchen and day center services	\$12,446

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**Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

**Big Brothers Big Sisters of South Central Indiana (BBBSCI)**

Name of Project to be Funded:

**Increase Staffing**

Amount Requested:

**\$22,350.00**

Number of City Residents Served:

**250+**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
4	2	100+

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

At Big Brothers Big Sisters of South Central Indiana (BBBSCI) our mission is to create and support one-to-one mentoring relationships to ignite the power and promise of youth. Our vision is that all youth will achieve their full potential. By partnering with parents/guardians, volunteers, and others in the community, we are accountable for each child in our program achieving the following: Higher aspirations, greater confidence, and better relationships. avoidance of risky behaviors, and educational success.

Project Synopsis:

Expanding our paid staff hours is not just a necessity; it's an investment in the future of our community. BBBSCI has seen a surge in demand for mentorship relationships between our dedicated volunteers, our "Bigs," and the youth in our community, affectionately known as "Littles." As we increase our staff capacity, we can meet this demand head-on, ensuring that every child in need of guidance and support has access to a caring mentor. This project isn't just about numbers on a payroll; it's about changing

lives, forging meaningful connections, and empowering our youth to reach their full potential. With your support, we can continue to make a lasting impact on the lives of countless children throughout South Central Indiana. Join us in building a brighter future for our community—one mentorship relationship at a time.

**Need Addressed:** (i.e. food, shelter, childcare)

At the heart of our mission lies a commitment to serving the most vulnerable members of our community: the youth. From ages 6 to 25, we welcome individuals from all walks of life into BBBSCI. Our programs are more than just activities; they're lifelines for these young individuals, providing mentorship, creative outlets, community engagement, and emotional support—all at no cost to the participants or their families. Through BBBSCI, youth are not just participants; they're empowered individuals with the opportunity to explore their interests, and ultimately, realize their fullest potential. By investing in our program, you're not only supporting the youth of our community, but you're also investing in a brighter, more inclusive future for us all.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Part-time to Full-time with Salary Increase (20 hours per week to 40 hours weekly) from May 1, 2024- December 31, 2024-35 weeks	\$14,350.00
2. Health Benefits -eligible for full-time staff	\$6,500.00
3. Professional Development Training	\$1,500.00
4. Fringe Benefit: Personal Time off, Holiday Pay (not part of Jack Hopkins request)	\$3,036.00
<b>Total Requested</b>	<b>\$22,350.00</b>
<b>Total Project Cost</b>	<b>\$25,386.00</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1995	Granted	Office Renovation	\$4,800
1999	Denied	Capital Grant	\$0
2000	Denied	Long Range Business and Growth Plan	\$0
2000	Granted	To expand hours and activities for children at their Crestmont Site	\$9,500
2001	Granted	To purchase and install windows and doors for its facility	\$8,779
2002	Granted	To purchase computer equipment for recruitment and training initiative	\$3,623
2003	Granted	To pay for Program Manager and program expenses for Girl's Inc.'s Teen Outreach LEAP Program	\$11,904
2004	Granted	Purchase a server, related equipment, and software to implement Phase I of its long range services plan	\$4,500
2005	Granted	Salary of Partnership Coordinator for a multi-year Capacity Building project	\$5,000
2006	Granted	To reconfigure and repair the roof and restore water-damaged areas at 418 South Walnut	\$8,109
2007	Denied	Congregation Volunteer Recruitment Project	\$0
2008	Denied	Bookend Bigs	\$0
2010	Granted	To purchase BlackBaud Sphere in a Box website software and associated set up and training fee for use by agency.	\$2,900
2011	Granted	To provide salaries, utilities, supplies, and other operational costs for the One-to-One child mentor program	\$7,000
2012	Denied	Big Brothers Big Sisters relocation	\$0
2013	Granted	To finish the basement of the new facility at 807 North Walnut to better meet their needs.	\$25,600
2014	Denied	One-to-One Youth Mentoring	\$0
2015	Granted	To support a Match Support Specialist position in our One-to-One (OTO) Mentoring Program	\$10,300
2018	Withdrawn	Kids with Absent Parents Pilot Program	\$0

2019	Denied	A new mentoring program, Bigs with Badges	\$0
2020	Granted	Lessening the Affect of ACEs (Adverse Childhood Experiences) - Personnel Expenses	\$15,000
2020	Denied	Strategic Planned Sustainability and Growth	\$0
2021	Granted	Operational Expenses	\$20,000
2022	Granted	Operational Expenses, Recruitment and Capital Investments	\$14,000
2023	Denied	The BIG Move Operational Expenses	\$25,250

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**Staff Comments:**

Applicant requesting funding for salaries and related expenses. Hourly rates seems to be \$20.50/hr. Committee may want to clarify whether the agency could utilize partial funding without receiving funding (or only partial funding) for the top prioritized expense.

# APPLICATION SUMMARY

Name of Lead Agency:

Bloomington Cooperative Living

Name of Project to be Funded:

**Middle Earth Repairs**

Amount Requested:

**\$4,110.30**

Number of City Residents Served:

**20**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
0	1	60

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The mission of BCL is: "Bloomington Cooperative Living creates and maintains affordable, communal housing in Bloomington, Indiana that is democratically controlled by residents." As a registered 501(c)(3) nonprofit organization, we believe housing is a human right. We work together to create, maintain and expand affordable housing in Bloomington, Indiana without a profit motive.

As part of the BCL mission and commitment to affordable housing, 75% our members meet national, state, and local low-income standards. All members at Middle Earth (404 W. Kirkwood Ave.) and The Trellis (921 W. 9th St.) fall below the 80% threshold for the HUD Bloomington metro area.

Project Synopsis:

BCL is requesting \$4,110.30 for immediate repairs needed at our largest house in the cooperative (20 residents). This repair will help us achieve electrical safety in the home to standards at 404 W. Kirkwood Ave (Middle Earth).



Repairing and replacing the 200 amp main electrical panel is the most urgent and necessary item. We are also requesting security lights and camera for our bike shed that houses over 25 bicycles. We have witnessed in the past week alone multiple nonresidents approaching the bike shed and have already had one theft in 2024. It is now a security risk for our members property and safety of the home without cameras and outdoor lighting. Finally, we would like to install an additional outlet in 2 bedrooms that currently only have one functioning outlet. This ensures that the rooms are electrically accessible for use.

BCL has committed to funding multiple repairs at Middle Earth (insulation, HVAC, installation of new floor and bath upstairs that leaks into kitchen, etc.) and at our 2 other owned properties (flooring, insulation, misc. repairs). We expect this request to be much less than all other total repairs yet critical to fund.

**Need Addressed:** (i.e. food, shelter, childcare)

Low-income housing

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Change and repair 200 amp main electrical box	2295.50
2. Install security at front and bike shed door & Move exterior light and add LED motion light at bike shed	1112.00
3. Add outlets into 2 upstairs bedrooms that have only 1 outlet per room	702.80
<b>Total Requested</b>	<b>4110.30</b>
<b>Total Project Cost</b>	<b>4110.30</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2020	Denied	Repair Roof at 921 W 9 <sup>th</sup> St	\$7,000
2023	Granted	Middle Earth Repairs to fund repair of Porch Roof Membrane	\$8,400

---

### **Staff Comments:**

The application states that 20 city residents would be served by the project. The Committee may wish to consider the proportionality of the request (i.e. the amount of the request relative to the number of clients, especially city residents, to be served).

# APPLICATION SUMMARY

Name of Lead Agency:

Bloomington Meals on Wheels

Name of Project to be Funded:

**Medically-Tailored Meal Kits**

Amount Requested:

5,500

Number of City Residents Served:

100

Number of Employees:

Full-Time	Part-Time	Volunteers
0	2	300

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The mission of Bloomington Meals on Wheels is to provide nutritional meals to homebound persons who are unable, through medical or physical disability, to purchase and prepare nourishing meals. The service is provided to the ill, disabled or elderly, regardless of income and without distinction as to race, color, creed, national origin or sex.

Project Synopsis:

We are requesting \$5,500 for a pilot program to create and distribute 100 medically-tailored food pantry kits. Individuals with chronic medical conditions such as heart disease or diabetes often struggle to find appropriate foods available at food pantries. We would like to pilot a program to make medically-tailored food pantry kits. We would start with a low-sodium kit and a diabetic friendly kit. Each kit would include a one-week meal plan, recipes, and all ingredients needed to make the meals in the kit.

**Need Addressed:** (i.e. food, shelter, childcare)

This project will improve access to healthy foods need to maintain a diet that manages chronic conditions, improving health and reducing emergency healthcare due to nutrition related to chronic health issues.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Dietician to develop meal plans, recipes, ingredient list	\$750
2. Food	\$4,500
3. Delivery for food	\$250
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$5,500</b>
<b>Total Project Cost</b>	<b>\$15,500</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2011	Denied	Bloomington Meals on Wheels (3 clients for 1 year)	\$0.00
2012	Granted	Ensuring hot meal delivery for Bloomington's Homebound	\$1,118.99
2020	Granted	Electric Meal Transporters	\$7,260.00
2020	Granted	Medically tailored meals	\$10,000.00
2021	Granted	Website redevelopment	\$5,673.00
2023	Granted	Supplies for mobile food pantry program	\$2,942.00

---

### **Staff Comments:**

The committee might want to clarify whether any of the itemized program elements are required for the project to proceed, in the event partial funding is awarded.

# APPLICATION SUMMARY

Name of Lead Agency:

Bloomington St. Vincent de Paul serving Monroe CO

Name of Project to be Funded:

**St. Vincent de Paul Housing Stability Program**

Amount Requested:

**\$30,000**

Number of City Residents Served:

**288**

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	72

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Bloomington St. Vincent de Paul provides safety-net services to families and individuals in our community who are suffering, forgotten, or deprived-the working poor, the homeless, those who have been incarcerated, and all people living on the margins of society. We seek a solution to help those in need to pay rent to secure housing.

Project Synopsis:

We request \$30,000 to assist the vulnerable population in the city of Bloomington to pay rent. With this grant funding we will pay up to \$250 to help families stabilize their housing situation.

Need Addressed: (i.e. food, shelter, childcare)

Our funding request directly addresses identified priorities for social service funds for basic services related to shelter for City residents in need. We will provide assistance with rent for Bloomington city residents.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Rent Assistance	\$30,000
2.	
<b>Total Requested</b>	<b>\$30,000</b>
<b>Total Project Cost</b>	<b>\$91,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2005	Denied	SVDP Furniture distribution and resale center	\$0
2008	Denied	Replace truck engine	\$0
2019	Granted	Funding to support vehicle repair program	\$8,167
2020	Granted	COVID-19 Supplemental Back-Rent Program	\$15,000
2020	Granted	Bloomington Utility Assistance Program	\$15,000
2021	Denied	Housing Stability Program – pay rent and rent deposits	\$0
2022	Granted	Utility Assistance Program	\$30,000
2023	Granted	Housing Stability Program to fund rent and deposit assistance	\$14,285

---

### **Staff Comments:**

No comments.



# APPLICATION SUMMARY

Name of Lead Agency:

Boys & Girls Clubs of Bloomington

Name of Project to be Funded:

Safe Entrances and Exits

Amount Requested:

\$20,000

Number of City Residents Served:

1,175

Number of Employees:

Full-Time	Part-Time	Volunteers
28	47	148

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The mission of the Boys & Girls Clubs of Bloomington (BGCB) is to empower all young people, especially those who need us most, to reach their full potential as caring, productive, responsible citizens.

Project Synopsis:

We are requesting \$20,000 to replace all doors in our Lincoln Street and Ferguson Crestmont Clubs to increase safety.

Need Addressed: (i.e. food, shelter, childcare)

safety for childcare

**Type of Funding Sought:** (check all that apply)

X Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
1. Ferguson Crestmont Exterior Doors	\$5,115
2. Lincoln Street Exterior Doors	\$3,410
3. Ferguson Crestmont Interior Doors	\$7,230
4. Lincoln Street Interior Doors	\$4,245
5.	
6.	
<b>Total Requested</b>	<b>\$20,000</b>
<b>Total Project Cost</b>	<b>\$25,525</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1996	Granted	Central Air Conditioning	\$3,000
1997	Denied	Van	\$0
1998	Granted	Renovate and equip facility for a teen center and learning center	\$23,000
2003	Granted	Job Development Specialist for TEEN Supreme Career Prep Program	\$25,000
2004	Granted	Pay for salaries, transportation, and other operating costs related to the No Kid Left Behind Program	\$8,000
2006	Granted	To pay for staffing, supplies, food, and rent for the Crestmont Youth Camp	\$8,160
2007	Denied	Camp Rock Facility Improvements	\$0
2008	Granted	To purchase a minibus for the transportation of children	\$17,000
2009	Granted	To help pay for salary and benefits for Unit Director at Crestmont site	\$14,257.14
2010	Granted	To purchase bicycles and equipment for the Club Riders Program	\$3,567.14
2011	Granted	To pay for salaries for the Crestmont Boys and Girls Club	\$12,000
2012	Denied	Teen Career Development Initiative	\$0
2013	Granted	To purchase paint, and license a "gently used" full-size 71 person school bus"	\$25,000
2014	Granted	To pay for salaries and benefits for the Unit Director and Program Director for the Crestmont facility at 1037 N. Summit Street.	\$23,270
2015	Granted	To replace the flat roof of a recently purchased building at 803 North Monroe Street	\$25,000
2016	Granted	To cover renovation costs of a two-story section of a Boys and Girls Club building located 803 North Morton Street	\$19,000
2017	Granted	To purchase chairs and tables for the New Crestmont Club	\$15,000
2018	Granted	Furnishings for Lincoln Street Unit	\$27,000
2019	Granted	Site preparation for new outdoor recreational space	\$9,000
2020	Granted	Continued operation of clubs	\$15,000
2021	Granted	Continuing Operations Post Covid-19	\$24,000
2022	Granted	Accessibility Improvements for Crestmont Youth with Disabilities - elevator power unit	\$23,005.32
2023	Granted	Professionalize and Expand Youth Development Staff to fund one professional program staff position	\$12,000

### **Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

Cancer Support Community South Central Indiana

Name of Project to be Funded:

**Financial Assistance for Cancer Patients**

Amount Requested:

**\$9000**

Number of City Residents Served:

**60**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
4	6	50

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Cancer Support Community (CSC) uplifts and strengthens people impacted by cancer by providing support, fostering compassionate communities, and breaking down barriers to care.

Project Synopsis:

We are requesting \$9,000 for financial assistance and supplies for cancer patients to meet essential needs for their household during cancer treatments.

Need Addressed: (i.e. food, shelter, childcare)

Food, Transportation, and Resources for Cancer Patients

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Grocery Cards	\$2000
2. Gas Cards	\$1000
3. Cancer Supplies	\$5000
4. Processing Applications	\$1000
5.	
6.	
<b>Total Requested</b>	<b>\$9000</b>
<b>Total Project Cost</b>	<b>\$32,430</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2022	Denied	Survivorship on the Go (request for a van)	\$19,000
2023	Granted	Cancer Patient Assistance to purchase essential items to meet patient needs, including any combination of: groceries, transportation, wigs & hats, wig fittings & application processing, and promotional materials	\$5,000

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### **Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

Catholic Charities Bloomington, Inc.

Name of Project to be Funded:

**Affordable therapy for low-income children and youth**

Amount Requested:

**\$27,947**

Number of City Residents Served:

**97**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
8	3	11

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The mission of Catholic Charities Bloomington Counseling Services is to serve all individuals, all couples, and all families by increasing accessibility to quality mental health care in our community.

Project Synopsis:

Catholic Charities Bloomington (CCB) requests \$27,947 to help subsidize our staffing costs associated with providing therapeutic services to Bloomington residents, particularly youth under age 18, whose families utilize our sliding-scale self-payment system.

Need Addressed: (i.e. food, shelter, childcare)

Health care (mental health)

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>		<b>Cost</b>
1.	Staff Time	\$25,752.28
2.	Office Rental	\$2,194.72
3.		
4.		
5.		
6.		
<b>Total Requested</b>		<b>\$27,947.00</b>
<b>Total Project Cost</b>		<b>\$88,150.00</b>



## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2006	Denied	Latino Outreach	\$0
2010	Granted	To pay for start-up costs for the Incredible Years Social Skills Training Program described in the agency's application.	\$8,894.25
2012	Denied	Prevention and early intervention mental health services for families living in poverty	\$0
2013	Granted	To train up to three therapists in, and buying equipment for, a counseling model entitled Theraplay	\$4,775
2014	Granted	Salary and benefits	\$12,625.71
2015	Denied	To fund its pilot program, Identifying the Mental Health Needs of Senior Citizens in Bloomington	\$0
2017	Granted	Supervision and training for play therapy and purchase Positive Family Coaching	\$7,175
2018	Granted	Trauma-Informed Care Project	\$13,000
2019	Granted	Expand agency capacity for trauma treatment services	\$13,479
2020	Granted	Trauma Expansion Grant	\$20,278
2020	Granted	Safe Work Space Project	\$2,014.23
2021	Granted	Therapy salary costs for 24 weeks and trauma training	\$17,800
2023	Granted	Telehealth infrastructure support initiative, to fund any combination of telehealth needs	\$12,500

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### **Staff Comments:**

The committee may wish to ask whether partial funding of "Staff time" would allow the agency to proceed and whether there are any funding amounts within that itemized program element that would be a make-or-break for the project.

# APPLICATION SUMMARY

Name of Lead Agency:

**Center for Sustainable Living dba Indiana Solar For All (INSFA)**

Name of Project to be Funded:

**Indiana Solar For All 2024-25 Installation Season**

Amount Requested:

**\$18,000**

Number of City Residents Served:

**21**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
		approximately 200 in CSL - nearly 80 in INSFA

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

As a project of the Center for Sustainable Living, Indiana Solar for All (INSFA) is a non-profit program whose mission is to quickly ramp up the spread of rooftop solar in Indiana while making it affordable to those who need it most – the people most burdened by energy costs and most vulnerable to electric rate increases.

Project Synopsis:

Indiana Solar for All seeks a one-time investment of \$18,000 from JHSSF to fund the solarization of 3 lower-income homes in Bloomington. The average household income for these households is 58% AMI, with their energy burden ranging from 2% to 12% of annual income.

Need Addressed: (i.e. food, shelter, childcare)

energy security

**Type of Funding Sought:** (check all that apply)

Capital Investment

x Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. package cost, solar system #1	\$6,000
2. package cost, solar system #2	\$6,000
3. package cost, solar system #3	\$6,000
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$18,000</b>
<b>Total Project Cost</b>	<b>\$30,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2005	Denied	Human Power: Service Learning on Wheels	\$3,060.00 (requested)
2018	Granted	Expand Glenn Carter Memorial Toolshare Workshop – Application by CSL as Glenn Carter Memorial Toolshare	\$3,000.00
2019	Granted	Safety gear and tools - Application by CSL dba Indiana Solar for All	\$6,290.00
2019	Granted	Expansion of GCMT programming, building renovations, and temporary staff – Collaborative application with Made Up Mind	\$20,782.00
2023	Denied	Installation of a high efficiency, all-electric Mitsubishi heat pump system for heating and cooling our building. Application by CSL dba The Overlook	\$17,400.00 (requested)

---

### **Staff Comments:**

Indiana Solar for All is a project of the Center for Sustainable Living. Other projects of CSL (Glenn Carter Memorial Toolshare, The Overlook) have previously applied for Jack Hopkins funding.

The committee might consider how well the applicant’s mission of encouraging the spread of rooftop solar energy aligns with the Jack Hopkins criteria.

The application states that the number of clients to be served in total would be 3 households and that the number of city residents to be served would be 21. The committee might want to clarify these numbers and consider the proportionality of the requested amount to the number of city residents to be served.

The committee might want to confirm whether the installation of solar panels would occur on private property, which appears to be the case. The committee’s Elaboration of Criteria states that the Committee typically does not grant funds to agencies for capital improvements to real property not owned by the agency and that applications for construction, renovation, or improvements to a building not owned by the applicant agency will be given a low priority.

# APPLICATION SUMMARY

Name of Lead Agency:

Community Justice and Mediation Center

Name of Project to be Funded:

Eviction Prevention Project (EPP): Landlord Tenant Mediation & Social Services

Amount Requested:

\$21,890

Number of City Residents Served:

210

Number of Employees:

Full-Time	Part-Time	Volunteers
1	2	55

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The Community Justice & Mediation Center's mission is to promote a civil and just community through mediation, education, facilitation and restorative justice programs.

Project Synopsis:

We are requesting \$21,890 to provide ongoing operational support for the Eviction Prevention Project (EPP) by providing free Landlord-Tenant mediation services, project management, data collection, social service referrals, and navigation services for tenants and landlords before, during, or after eviction proceedings. Funds will also support piloting a new volunteer *Court Checkout* process.

Need Addressed: (i.e. food, shelter, childcare)

Shelter

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	Staffing	\$19,560
2.	Equipment/Technology	\$830
3.	Indirect Costs	\$1000
4.	Pilot Training and Volunteer Recruitment	\$500
5.		
6.		
<b>Total Requested</b>		<b>\$21,890</b>
<b>Total Project Cost</b>		<b>60,619</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2005	Granted	Personnel, training, and recruitment expenses for constructive conflict resolution program for Black and Multi-racial youth	\$1,400
2006	Granted	To pay for printing a conflict resolution handbook, purchasing conflict resolution materials, and personnel expenses for outreach and instruction.	\$2,170
2010	Denied	Director of Services and Managing Director	\$0
2018	Granted	Develop and Pilot "Mediation Matters" Program	\$9,493
2019	Granted	In collaboration with South Central Indiana Housing Opportunities, CJAM, Justice Unlocked & Tenant Assistance Program – Pilot tenant assistance project	\$7,676
2021	Granted	Support for HEPP project (CJAM personnel, equipment & technology, indirect costs and printing/copying)	\$27,424
2023	Granted	Eviction Prevention Project staffing, equipment/technology, supplies, eviction sealing pilot	\$21,283

---

### **Staff Comments:**

The committee might ask whether a partial award of the “staffing” expense would be of use to the agency, and at what amounts (the budget breaks this item down in more detail).

# APPLICATION SUMMARY

Name of Lead Agency:

Community Kitchen of Monroe County, Inc.

Name of Project to be Funded:

**Express Rebuild Equipment Replacement**

Amount Requested:

**\$18,184.64**

Number of City Residents Served:

**3,280**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
6	14	About 120/wk

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Community Kitchen's mission is to work alone and in collaboration with others, to eliminate hunger in Monroe County and surrounding areas through direct service, education and advocacy.

Project Synopsis:

We request \$18,184.64 to replace the equipment at our Express location: a warmer, reach-in cooler, glass door cooler and steam table (buffet).

Need Addressed: (i.e. food, shelter, childcare)

food



**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. T-49 True reach-in cooler	\$5,000
2. GDM-49 True glass door reach-in	\$4,500
3. CresCor mobile hot food cabinet	\$4,300
4. Duke EconoMate portable buffet	\$4,384.64
5.	
6.	
<b>Total Requested</b>	<b>\$18,184.64</b>
<b>Total Project Cost</b>	<b>\$18,184.64</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1995	Granted	Used vehicle to serve meals	\$9,000
1997	Granted	Transport containers to provide meals to at risk youth in after school programs	\$1,300
1998	Granted	Purchase upright commercial oven, mobile sheet pan rack, and mats for kitchen floor	\$4,675
1999	Granted	Ice machine and freezer	\$4,650
2000	Granted	Eight dining tables	\$2,460
2001	Granted	To purchase equipment for second food preparation and distribution site	\$10,721
2002	Granted	To purchase a copy machine shared with Shelter, Inc. and aprons, and hairnets	\$3,639
2003	Granted	Replace fire suppression system, loading dock, and 60 chairs for the S. Rogers site	\$10,104
2004	Granted	Replacing a door and dishwashing machine, purchase a garbage disposal and kitchen grade metal shelving	\$7,780
2005	Granted	Replace produce cooler and purchase food trays for free meal service	\$4,100
2006	Granted	To purchase and repair a used van from Girls, Inc.	\$8,401.64
2007	Granted	To purchase and install a walk-in cooler and freezer for the 917 South Rogers facility.	\$29,800
2008	Granted	To purchase a commercial-grade refrigerator for use at 917 South Rogers Street.	\$2,350
2009	Granted	To purchase printed backpacks for the Backpack Buddies program.	\$1,005
2010	Granted	To purchase a pallet truck, ice machine and storage bin and two "trainable" dollies	\$7,851.00
2011	Granted	To pay for equipment and relocation costs for new South Rogers Street facility.	\$10,000.00
2012	Granted	Equipment purchase	\$7,555.00

2013	Granted	To purchase six pieces or kinds of equipment to improve the efficiency and effectiveness its main facility at 1515 S. Rogers.	\$3,475.00
2014	Granted	To purchase a new cargo van to transport food and otherwise support agency mission.	\$21,032.00
2016	Granted	To purchase a tilt skillet and to pay for parking lot repair.	\$19,824.00
2017	Granted	To purchase kitchen equipment and a power washer.	\$2,174.00
2018	Granted	Double Convection Oven	\$8,860.00
2019	Granted	Equipment purchase and van retrofitting	\$1,170.00
2020	Granted	Warehouse Pallet Shelving	\$8,113.00
2021	Granted	Produce Cooler Replacement (True T-72-HC three-door cooler)	\$5,400.00
2023	Granted	Equipment retrofit replacing dish sprayer and rhino-line beds in cargo vans	\$4,079

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**Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

Courage to Change Sober Living

Name of Project to be Funded:

**Wrap-Around Rental Help**

Amount Requested:

**\$7820**

Number of City Residents Served:

**47**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
	4	<12

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Courage to Change Sober Living provides affordable, safe sober living, staff and peer supported, transitional housing to those with substance use disorder in Monroe County.

Project Synopsis:

Provide Fresh Start Rental Scholarships to those coming into our program and Rental Help Scholarships for graduates of our program who are moving into their own housing.

Need Addressed: (i.e. food, shelter, childcare)

Shelter

**Type of Funding Sought:** (check all that apply)

Capital Investment

x Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
1. Fresh Start Rental Scholarshins	\$5220
1. Graduation Rental Help Scholarships	\$2600
<b>Total Requested</b>	<b>\$7820</b>
<b>Total Project Cost</b>	<b>\$17860</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2019	Granted	Expand Fresh Start Rent Subsidy program	\$5,667
2020	Granted	Fresh Start Fund	\$6,000
2020	Granted	Case/House Managers Salaries	\$3,430
2021	Granted	Drug Testing Kits for Residents	\$3,036
2022	Granted	Courage to Challenge - will allow female recovering addicts to actively engage in twice monthly recreational and educational pro-social activities in and around Bloomington.	\$2,129
2023	Granted	Substance misuse recovery pilot for men's program to fund any combination of tickets to events, staff hours, and food	\$1,979

---

### **Staff Comments:**

Request for operational funding – agency has received grants for this program in past years.

# APPLICATION SUMMARY

Name of Lead Agency:

Cry of the Children, Inc.

Name of Project to be Funded:

**Enrichment program and Community Thanksgiving Meal**

Amount Requested:

**1,515.00**

Number of City Residents Served:

**150**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
0	0	38

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

In collaboration with local community organizations, schools, and parents. Cry of the Children, Inc. seeks to help youth obtain the tools they need to build and maintain successful relationships with parents, teachers, and the larger community of Bloomington, Monroe County, Indiana.

Project Synopsis:

We are requesting \$1,515.00 for reading skilled books, reading games, math games, geography workbooks, backpacks and supplies to help prepare and expand youth in their academic growth and success. For the Annual Thanksgiving Meal we are asking for plates, cups, table settings, turkeys, potatoes, oyster dressing, green beans, rolls, dressing, gravy, cranberry sauce, and deserts.

Need Addressed: (i.e. food, shelter, childcare)

1. An increased rate of educational attainment among youth in Monroe County
2. A decreased rate of youth who drop out of high school
3. Increased graduation rate
4. Increased knowledge and skills that enable youth to make healthy choices and decision in their lives
5. Provide a warm meal at the Thanksgiving Meal
6. Handing out hand warmers, gloves, home made hats and scarves
7. Providing those going into their new residents, with microwaves, a hotel stay, and clothing.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Reading Skilled Books	\$75.00
2. Literature	\$28.00
3. Math Games	\$48.00
4. Geography Educational Games	\$71.00
5. Thanksgiving Meal	\$150
6.	
<b>Total Requested</b>	<b>\$1,515.00</b>
<b>Total Project Cost</b>	<b>\$1,515.00</b>



## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
N/A			

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### **Staff Comments:**

First-time applicant for Jack Hopkins funding.

Application is missing required elements – the project budget detailing the use of Jack Hopkins dollars and a year-end financial statement.

Applicant notes that claims for reimbursement would be submitted in Feb 2025, which would require an extension of the claim deadline by the HAND Director.

# APPLICATION SUMMARY

Name of Lead Agency:

Dental Care Action Inc.

Name of Project to be Funded:

**Technological Improvement in Support of Vulnerable and Underserved Access to Dental Care**

Amount Requested:

**\$17,995.99**

Number of City Residents Served:

**1,750**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
4	4	11

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Dental care and dental health education for low-and no-income Bloomington and surrounding communities in the hopes of reaching the medically underserved, regardless of ability to pay.

Project Synopsis:

Replacement of 10-12 year old computer technology essential to the continuation of our dental services (offices & operatories), and the addition of an Air Water Separator that affects equipment function and longevity as well as air quality.

Need Addressed: (i.e. food, shelter, childcare)

Dental care and, by relation, health, life quality and social well-being.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. 7- Dell Optiplex 7010 Small Form Factor Desktops	\$5,943.00
2. 1- Intel Core i0-13900K Raptor Lake 24-Core Server	\$2,892.00
3. 1- Microsoft Windows Server 2022 License-24 cores 1- Windows Server 2022 CAL - 10 Device package	\$1,399.00 \$699.00
4. 30-45 hrs. installation of computer software & technology	\$4,990.00
5. 1- Air Water Separator	\$1,356.99
6. 4- Dell 27" monitors	\$716.00
<b>Total Requested</b>	<b>\$17,995.99</b>
<b>Total Project Cost</b>	<b>\$20,995.99</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1995	Denied	Computerization to meet Medicaid requirements	\$0
1996	Granted	Dental Equipment	\$1,450
1999	Granted	Dental chairs and equipment	\$17,144
2000	Granted	To acquire used equipment	\$7,000
2023	Granted	Dental Care and Education for Health and Well-being outreach to low-income and no-income residents to fund any combination of: initial exams, self-care products, cleaning/treatments, and patient transportation	\$9,388

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### **Staff Comments:**

The Committee might ask whether any of the itemized expenses are dependent on others (i.e., if no funding for Priority #1, would funding for other items make sense?).

# APPLICATION SUMMARY

Name of Lead Agency:

Exodus Refugee Immigration, Inc.

Name of Project to be Funded:

**Emergency Assistance Program**

Amount Requested:

**\$15,000**

Number of City Residents Served:

**15**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
10	0	50

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Exodus Refugee Immigration is dedicated to the protection of human rights by serving the resettlement needs of refugees and other displaced people fleeing persecution, injustice, and war by welcoming them to Indiana.

Project Synopsis:

Exodus Refugee Immigration kindly requests \$15,000 to support emergency housing assistance (Airbnb, extended stay hotels, rent, etc.) and associated basic needs, such as food for newly arriving refugees.

Need Addressed: (i.e. food, shelter, childcare)

Through the Emergency Assistance Program, Exodus will address the following social service needs: a good place to live - housing, building self-sufficiency, economic self-sufficiency, economic challenges facing vulnerable populations, ensuring prenatal care

and infant health, hunger and food insecurity, emergency and transitional shelter, clothing, and crisis services for refugees.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Emergency Assistance – For vulnerable refugees to cover basic need expenses, such as rent & utilities, childcare, medical expenses, food, seasonal & work clothing, etc., while they work toward self-sufficiency.  *For the purpose of this grant, funds will primarily go toward rent/utilities and food assistance.	\$175,000
2.	
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$15,000</b>
<b>Total Project Cost</b>	<b>\$175,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2022	Granted	General Operating	\$13,000
2023	Denied	Emergency assistance program for refugees meeting basic needs	\$30,000 requested

---

### **Staff Comments:**

Application states that the requested Jack Hopkins funding would support 15 refugees, while the general Emergency Assistance Program would serve 100 total clients (all city residents). The committee might consider the proportionality of the request to the number of clients to be served by the Jack Hopkins funding.

The applicant requested upfront payment of any award, which is not how the Jack Hopkins grants are administered. The Committee might confirm that the agency will be able to make use of any awarded funding on a reimbursement basis.

The Committee might also ask whether partial funding would prevent the project from going forward. The application did not provide a prioritized list of program elements, though the project synopsis describes Airbnb, extended hotel stays, rent, and food as basic needs that are part of the agency's Emergency Assistance program. The Committee might seek detail as to what would be supported by Jack Hopkins funding.

# APPLICATION SUMMARY

Name of Lead Agency:

Girls Inc. of Monroe County

Name of Project to be Funded

HerHealth Initiative

Amount Requested:

\$10,000

Number of City Residents Served:

500 in 2024

Number of Employees:

Full-Time	Part-Time	Volunteers
4	10	4

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

To inspire all girls to be strong, smart, and bold.



**Project Synopsis:**

Her Health Initiative: addressing critical areas such as: body image, nutrition, menstrual health, and stress management through interactive workshops, physical activities, and dialogue.

**Need Addressed:** (i.e. food, shelter, childcare)

Health and Wellbeing for Bloomington girls aged 6-12

**Type of Funding Sought:** (check all that apply)

Capital Investment

X Operational Funds

Bridge Funding

X Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
• Summer Camp Supplies	4,500
• In-School Programming Supplies	4,500
• Girl's Inc. Center Supplies	1,000
•	
•	
•	
<b>Total Requested</b>	\$10,000
<b>Total Project Cost</b>	\$90,067.00

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1995	Granted	Interior Construction	\$21,700.00
1996	Granted	Van purchase	\$10,000.00
1998	Granted	Purchase equipment to implement Operation SMART	\$6,500.00
1999	Denied	Automatic Doors	\$4,969.00 (requested)
2000	Granted	For supplies and equipment for summer camp program and two car infant seats	\$2,303.00
2002	Granted	To pay for the salary of the director of the after-school and summer youth programs.	\$15,000.00
2004	Granted	Pay a portion of the cost of one used bus	\$10,000.00
2006	Granted	To pay for personnel expenses for a half-time Program Specialist and purchase Commit to be Fit support materials.	\$1,950.40
2008	Denied	Teen Exploration College/Career Program	\$2,500.00 (requested)
2009	Granted	To pay for training staff.	\$2,930.71
2010	Granted	To help pay for the salary of the Program Director.	\$13,500.00
2011	Granted	To purchase and install a phone and voice mail system at 1108 West 8th Street.	\$2,000.00
2012	Granted	Furniture replacement	\$2,102.86
2013	Granted	To purchase Trax Solutions Management Information System license fee, a scanner and in-house staff training,	\$5,110.00
2014	Denied	Addition of Sports Program Manager	\$19,747.80 (requested)
2016	Granted	To pay for gutter and downspout replacement, said replacement having occurred in January-February 2016.	\$4,496.00

2017	Denied	Bold Programming	\$10,000.00 (requested)
2018	Granted	Repair Bus Fleet	\$13,463.00
2019	Granted	Security System	\$8,200.00

**Staff Comments:**

The committee might ask for additional detail about the kinds of supplies that would be purchased for the program.

# APPLICATION SUMMARY

Name of Lead Agency:

Hotels For Hope Inc

Name of Project to be Funded:

**H4H Emergency Hotel Room Stays**

Amount Requested:

**\$30,000**

Number of City Residents Served:

**100**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
1	0	10

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Our mission is to provide rapid interventions and support services that can prevent or end chronic homelessness. Wrap-around services are provided to support participants in their efforts to overcome homelessness with their dignity intact while gaining the self-confidence needed to not only survive but to thrive.

Project Synopsis:

To provide individuals/families in crisis with all of our services including emergency overnight hotel room stays.

Need Addressed: (i.e. food, shelter, childcare)

Shelter, Food, Hygiene and other Material Support, Casework and Follow Up Care, Crisis Intervention, Transportation and more.

Type of Funding Sought: (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

Itemized Costs: (in order of priority)

Item Name	Cost
1. Hotel Room Fees	\$30,000
2.	
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$30,000</b>
<b>Total Project Cost</b>	<b>\$30,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2020	Granted	Keeping Women and Children Out of the Cold	\$7,400.00
2021	Granted	To continue housing families experiencing homelessness	\$21,500.00
2022	Granted	Emergency and Transitional Program	\$14,000.00
2023	Granted	Emergency and Transitional Shelter	\$14,400.00

---

### **Staff Comments:**

The application does not describe the request as an operational expense. However, emergency hotel stays seems to be an ongoing program/expense of the organization. The committee might ask about the agency's plan for future funding.

The project budget provided by the applicant does not provide detail beyond the total amount requested. The committee might ask for more detail – e.g., how much each hotel stay would cost.

# APPLICATION SUMMARY

Name of Lead Agency:

Indiana Recovery Alliance

Name of Project to be Funded:

**Linkage to Care Coordinator**

Amount Requested:

**20000**

Number of City Residents Served:

**3000**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
4	5	15

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The IRA shifts resources and power to people who use drugs. We reduce both the individual and structural harms caused by racialized drug policy through direct action and advocacy.

Project Synopsis:

We are requesting \$20,000 for the salary for a new, dedicated, Linkage to Care position that will provide case management to the Indiana Recovery Alliance's participants. This position will link participants to programs and services, assisting people to fill out forms for benefits, make healthcare appointments, and register for recovery programs and treatment. Though we have provided these services in an adhoc fashion for a decade, consolidating this function into a dedicated role will mean case management for participants. The Linkage to Care Coordinator will come to know participants and their circumstances, creating a more cohesive and intentional experience for people who use drugs who are looking to make positive changes at the Indiana Recovery Alliance.

Need Addressed: (i.e. food, shelter, childcare)

Case management for clients of the Indiana Recovery Alliance to connect them to healthcare, food, shelter, recovery treatment, social services registration, etc.

Type of Funding Sought: (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

Itemized Costs: (in order of priority)

Item Name	Cost
1. 2/3 of Salary for this position	\$20,000
2.	
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$20,000</b>
<b>Total Project Cost</b>	<b>\$30,000</b>



## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2016	Granted	To pay for the purchase of an unmarked vehicle used in the provision of Indiana Recovery Alliance services	\$17,600.00
2017	Granted	To purchase naloxone, syringe disposal units, a storage shed, two card laminators, storage totes, and two bike trailers.	\$11,617.00
2018	Granted	Naloxone/Salary, Printer, Furnishings and Items for Disposal	\$16,953.00
2020	Granted	Support Funds	\$4,430.00
2021	Granted	Development Director salary support	\$17,000.00
2022	Granted	Syringe Service Program Coordinator	\$21,600.00
2023	Granted	Office Expansion Bridge to New Building	\$15,000.00

---

### **Staff Comments:**

Request for funding for a new position – the application states that the role would be funded through other grants in the future. The committee might inquire about whether this future funding is aspirational or whether the applicant has specific grants in mind and confirmed to fund this position beyond 2024.

# APPLICATION SUMMARY

Name of Lead Agency:

Middle Way House, Inc.

Name of Project to be Funded:

**New Wings Emergency Shelter Keypad Entry Locks**

Amount Requested:

**7939.20**

Number of City Residents Served:

**50+**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
22	25	20-30

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Middle Way House works to support all survivors of domestic violence, sexual assault, and human trafficking; and to educate the community through outreach and prevention programs. Our clients are at the center of all that we do. By centering the client, we acknowledge our work is for them and affirm that they will be treated with dignity and respect as they receive comprehensive, trauma-informed, and culturally inclusive services based on their self-identified needs and/or desired course of action.

Project Synopsis:

Middle Way House is requesting \$7,939 to purchase and install 12 keypad entry locks on shelter room doors. Currently, Middle Way House gives out room keys to residents upon arrival. The installation of keypad entry locks will allow Middle Way House to provide modern safety protocols to residents by creating unique key-codes that are changed after a resident leaves their specific room, reducing the risk of losing keys and the need of re-keying shelter room doors every few years.

Need Addressed: (i.e. food, shelter, childcare)

Shelter

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. 12 Keypad Entry Locks	6739.20
2. Labor	1200.00
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>7939.20</b>
<b>Total Project Cost</b>	<b>7939.20</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1993	Denied	Transitional housing project and day care center	\$0.00
1994	Granted	Women's and children's transitional facility	\$35,000.00
1996	Granted	Child Care Facility	\$17,350.00
1997	Denied	Construction Fees	\$0.00
1999	Denied	Interim Salary for Coordinator	\$0.00
2000	Granted	To construct addition onto their shelter	\$10,000.00
2000	Granted	To buy and install security devices for two facilities	\$2,426.00
2000	Denied	Travel and Conference	\$0.00
2000	Granted	To buy an Industrial Grade document scanner for Confidential Document Destruction Program	\$3,210.95
2001	Granted	To support pilot childcare nutrition program/enterprise by paying salaries of cook	\$23,885.00
2003	Granted	Thermal carriers; pots, pans, and food trays; and dishwasher proof dishes and flatware	\$4,100.00
2004	Granted	Pay a portion of salary and benefits for a Housing specialist	\$7,500.00
2005	Granted	Steel ramp, tow bar loops, lifts for Confidential Document Destruction	\$10,000.00
2006	Granted	To pay for the personnel expenses of the Childcare Program Coordinator	\$12,000.00
2007	Granted	To pay for salaries, taxes, and benefits for House Manager and weekend staff for the Emergency Shelter	\$6,500.00
2008	Denied	Alternative Power and Energy for New Wings Community Partnership	\$0.00
2009	Granted	To purchase beds and mattresses for the Emergency Shelter	\$10,500.00
2010	Granted	To purchase Food Works Kitchen equipment	\$10,554.00
2011	Granted	To pay for equipment and lighting to make facilities on South Washington more sustainable	\$12,000.00
2012	Granted	New Wings emergency DV shelter	\$24,000.00

2013	Granted	To pay for the salaries of two Crisis Intervention and Prevention Service Coordinators, plus taxes and benefits	\$11,715.00
2014	Denied	New Wings Community Partnership	\$0.00
2015	Denied	To purchase a high-speed, fiber-optic, integrated internet/phone system and a server	\$0.00
2016	Granted	To purchase beds, mattresses, vinyl sofas, rocking chairs and related furnishings for 338 S. Washington Street	\$11,800.00
2018	Granted	Redesign Technology Closet	\$11,000.00
2019	Granted	AEDs and hearing-impaired accessibility	\$7,470.00
2020	Granted	Climate Control Panel	\$3,000.00
2021	Granted	Replacement work truck	\$10,000.00
2022	Granted	Rise and Shine Childcare	\$12,000.00

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**Staff Comments:**

Application states that a partial award is useable and that the agency would utilize in-kind cash contributions if a partial amount is awarded.

# APPLICATION SUMMARY

Name of Lead Agency:

Monroe County Humane Association

Name of Project to be Funded:

**Accessible Veterinary Care for Low Income Families**

Amount Requested:

**\$10,508.75**

Number of City Residents Served:

**1,499**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
9	6	20+

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Monroe County Humane Association strives to advance animal welfare, deepen human-animal bonds, and extend accessible veterinary care and humane education across our community. This mission comes to life through the relentless efforts of our dedicated staff, volunteers, and generous supporters, ensuring every animal experiences the dignity and care they rightfully deserve.

Project Synopsis:

Monroe County Humane Association's (MCHA) nonprofit veterinary clinic stands as a vital resource in Monroe County, addressing the pressing need for accessible veterinary care among pets whose owners are struggling financially. In 2023, we provided \$115,414 in subsidized care to 2,306 pets, 1,499 were pets living within Bloomington city limits, highlighting the critical nature of our work. All of these families live at or below 150% of the federal poverty line, underscoring the essential role our subsidized services play in the community.

**Need Addressed:** (i.e. food, shelter, childcare)

The primary population served by this program consists of pets and their families who are financially disadvantaged, particularly those living at or below 150% of the federal poverty line. This demographic represents a significant portion of our client base, with 84% of our clients falling within this socio-economic bracket. The economic constraints faced by these families often lead to delayed or foregone veterinary care, exacerbating health issues for pets and contributing to higher rates of pet abandonment or surrender to shelters.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Heartworm/Flea/Tick/Parasite Prevention	\$2,101.75
2. Medications	\$2,207.00
3. Vaccinations	\$1,681.00
4. Lab/Diagnostic Services	\$1,471.00
5. Radiology/Xrays	\$1,051.00
6. Medical Examinations	\$1,156.00
7. Spay/Neuter Surgery & Humane Euthanasia Services	\$841.00
<b>Total Requested</b>	<b>\$10,508.75</b>
<b>Total Project Cost</b>	<b>\$115,414.00</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2001	Denied	Spay and Neuter Pets	
2019	Denied	Emergency housing and kennel facility	
2020	Granted	Immediate and extended emergency housing for pets (direct boarding and care, including housing, food, needed vaccines, and basic animal care)	\$2,000.00
2022	Granted	Pet Emergency Housing	\$5,765.71
2023	Denied	Spay/neuter program	\$12,500.00 (requested)

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### **Staff Comments:**

The application states that "Upon receiving a grant, MCHA will promptly request the full awarded amount once the funds are accessible." The committee might confirm that MCHA can make use of any awarded money on a reimbursement basis.

The committee might consider how well veterinary care aligns with the criteria and stated priorities of the Jack Hopkins program.



# APPLICATION SUMMARY

Name of Lead Agency:

Monroe County United Ministries (MCUM)

Name of Project to be Funded:

Facility Renovations to Enhance Programmatic and Organizational Capacity

Amount Requested:

\$50,000

Number of City Residents Served:

150

Number of Employees:

Full-Time	Part-Time	Volunteers
31		48

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Monroe County United Ministries' mission is to create lasting solutions to economic, educational, and social injustice through quality programs, collaboration, and innovation. Our vision is to end generational poverty for the people we serve.

Project Synopsis:

MCUM is requesting \$50,000 to renovate an outdated and underutilized space on our grounds. We intend to construct private 1-on-1 meeting rooms, office space, and a small conference room, all of which will enhance the capacity of our programs and agency.

Need Addressed: (i.e. food, shelter, childcare)

MCUM's programs address the 3Es outlined in the City's Anti-Poverty Strategy. Specifically, this project will expand the capacity of our economic mobility program Your Path, in which participants make short- and long-term goals towards self-sufficiency.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Renovation Project	\$381,000
2.	
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$50,000</b>
<b>Total Project Cost</b>	<b>\$381,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1996	Denied	Facility Addition – Daycare	\$0.00
1997	Granted	Addition and renovation of child care facility	\$51,000.00
1998	Granted	Renovate existing building to meet new building code	\$9,925.00
1999	Granted	Equipment for food area	\$11,850.00
2001	Granted	To pay rent and utilities for city residents at risk of being dislocated	\$32,884.00
2003	Granted	Subsidize childcare costs for low-income households within the City	\$20,000.00
2004	Granted	To subsidize childcare services for low-income City residents primarily during the summer months	\$15,000.00
2005	Granted	Caseworker salary for Emergency Services program	\$16,000.00
2006	Granted	To pay for personnel expenses of an additional social worker for the Emergency Services program	\$20,000.00
2007	Granted	To subsidize affordable childcare costs for working families residing in the City	\$28,080.00
2010	Granted	To purchase cots, cot carriers, cot name plates and emergency kits for the Affordable Childcare program	\$5,540.53
2011	Granted	To pay for electrical improvements and cold storage equipment for the Emergency Food Pantry	\$11,000.00
2012	Granted	Roof replacement for emergency services building	\$17,500.00
2013	Granted	To fund an energy audit and to pay for the purchase and installation of three air conditioning units and two furnace units	\$20,845.00
2014	Denied	Energy Efficiency Improvements for MCUM Childcare Facility	\$0.00
2015	Granted	For capital improvements to two playgrounds on its property in the Crestmont neighborhood	\$27,475.00
2016	Granted	To pay for construction costs associated with MCUM’s Food Pantry Expansion Project located at 827 W. 14 <sup>th</sup> Ct.	\$20,000.00
2017	Granted	To pay for staff salaries associated with the start-up operations of the Compass Early Learning Center.	\$20,000.00

2017	Granted	To pay for kitchen renovation for the Compass Early Learning Center, located at 219 E. 4 <sup>th</sup> St., Bloomington Indiana 47408	\$21,600.00
2018	Granted	Equipment Upgrades and Additional Staffing for Compass Early Learning Center	\$14,014.00
2019	Granted	Security system, fire protection/security, and energy efficient lighting	\$31,45.00
2020	Granted	Upgrades to Foster Kindergarten Readiness	\$16,000.00
2020	Granted	Building up Monroe County Residents	\$9,500.00
2021	Granted	Upgrade building exterior	\$22,000.00
2022	Granted	MCUM out in the community	\$23,000.00
2023	Granted	Replace outdated equipment, pay contracts and services, market programs	\$8,430.00

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**Staff Comments:**

Largest requested amount across 2024 applications.

The application says the agency could proceed with partial funding, but the application does not itemize how an award of less than \$50,000 would be broken down. Presumably, any amount awarded would be put toward the facility renovations, but the committee might want to confirm that this is the case. The committee might also want to ask whether there is some minimum amount of Jack Hopkins funding that would be needed to allow the project to proceed (given the other anticipated funding sources).

# APPLICATION SUMMARY

Name of Lead Agency:

**Mother Hubbard's Cupboard**

Name of Project to be Funded:

**Education and Youth Programming Support**

Amount Requested:

**14250**

Number of City Residents Served:

**25000**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
5	2	120

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Mother Hubbard's Cupboard works to increase access to healthy food in ways that cultivate dignity, agency, and community. We believe that access to healthy food is a basic human right. We actively work to eliminate barriers by addressing both immediate needs and their root causes.

Project Synopsis:

MHC is requesting \$14,250 for Education and Youth programming support. In 2023, MHC hosted 147 youth workshops, including gardening and cooking, with 812 participants. We hosted 47 cooking education workshops, and 70 garden workdates and workshops. Funding from Jack Hopkins would allow us to cover the costs of these programs that are offered not only to our patrons, but to all community members. We are also requesting materials to make our physical space accessible and sustainable, including garden beds, deck texturizer, and gravel for our parking lot. Funding in the requested amount will cover the following expenses (July - December):

- Gravel for parking lot
- Educational stipends
- Educational workshop supplies
- Compost
- Seed starting supplies (trays, domes, paper for tags, plastic wrap)

Vego raised beds  
 Microgreens supplies (lights, containers for kits, seed)  
 Tool Share  
 Stain and texturizer for new deck  
 Summer interns via ILP program  
 LED grow lights  
 Kids Snacks

**Need Addressed:** (i.e. food, shelter, childcare)

Food, youth health, education

**Type of Funding Sought:** (check all that apply)

- Capital Investment
- Operational Funds
- Bridge Funding
- Pilot Project
- Collaborative Project
- Other (Please Specify)

Programming support

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
Educational workshop supplies and stipends	2600
Garden education supplies (compst, seed starting supplies, vego raised beds, microgreen supplies)	3050
Tool share equipment and maintenance	1500
Kids Snacks	5000
Gravel for lot and deck stain/texturizer	600
Summer interns via ILP program	1500
<b>Total Requested</b>	<b>14250</b>
<b>Total Project Cost</b>	<b>14250</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1999	Granted	Refrigeration unit	\$1,029.00
2000	Granted	To establish a new Southside food pantry in concert with the Community Kitchen and the Perry Township Trustees	\$9,000.00
2002	Granted	To fund a new nutrition education program	\$5,000.00
2006	Granted	To pay for the purchase and installation of one two-door freezer unit and one two-door refrigeration unit	\$6,670.00
2008	Granted	To provide bridge-funding to pay for salaries to operate the Mother Hubbard's Cupboard community food pantry	\$24,000.00
2009	Granted	To help purchase a cargo van for the Food Pantry program	\$28,650.00
2011	Granted	To help purchase a van for the Garden and Nutrition Program	\$12,575.00
2012	Granted	Freezer storage for food pantry program	\$7,285.71
2013	Granted	Salaries of the Food Pantry Manager and Nutrition Education Coordinator and to pay CE) for 18 weeks	\$23,815.00
2013	Granted	To pay for staff salaries, printed materials, program supplies and scholarships	\$1,960.00
2014	Denied	Expansion of Garden and Nutrition Education	\$0.00
2015	Granted	To purchase 4 laptop computers, 2 external CD drives, and software to increase organizational efficiency	\$4,250.00
2016	Granted	To pay for staff salaries to expand Mother Hubbard's Cupboard's Education and Tool share programs	\$15,000.00
2017	Granted	To purchase a freezer, safety lighting, and a power washer for Mother Hubbard's Cupboard	\$4,002.00
2018	Granted	Equipment Purchase	\$7,017.00
2019	Granted	Computers and software	\$8,620.00
2020	Granted	Bridge Funding	\$10,000.00
2020	Granted	Winter preparation and staff support	\$19,100.00
2021	Granted	Office and pantry furniture	\$11,325.03
2022	Grated	Operational Bridge Funding	\$20,000.00

2023	Granted	Operational support - utilites, software, building repair and maintenance, operations manager salary	\$17,555.00
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**Staff Comments:**

No comments.



# APPLICATION SUMMARY

Name of Lead Agency:

My Sister's Closet of Monroe County, Inc.

Name of Project to be Funded:

Geppeta's- Cobbler Skills Training for Shoe Repair

Amount Requested:

\$25,000

Number of City Residents Served:

800

Number of Employees:

Full-Time	Part-Time	Volunteers
5	7	450

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

My Sister's Closet (MSC) is a non-profit organization, established to build a stronger community and promote economic self-sufficiency by providing women with professional support services and tools for success.

Project Synopsis:

MSC is requesting \$25,000 for supplies and staff training as part of our pilot project to assist women in making a living wage through development of basic technical skills and business training to work as a cobbler or in other related service-based businesses.

Need Addressed: (i.e. food, shelter, childcare)

Development of job training skills to assist women in establishing self-sufficiency through work in a field which benefits the environment as well as the community as a whole.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. 6-month salary- Project Lead #1 (20hrs x \$17.20 x 26 weeks)	\$8,944
2 Leather cleaning, restoration, basic exterior repair/polishing supplies (attached)	\$1,420
3 6-month salary- Project Lead #2 (20hrs x \$17.20 x 26 weeks)	\$8,944
4 Commercial Service Air Purifier HEPA + Carbon Filter, ductwork inspection, air filtration (attached)	\$5,500
5 Paid client workforce experiences x 4 clients x 100 hours each /\$13.74/hour	\$5,496
<b>Total Requested</b>	<b>\$25,000</b>
<b>Total Project Cost</b>	<b>\$30,304</b>

For Office Use Only

**Past SSF Funding:**

Year	Status	Title	Amount
2000	Denied	Wages, Rent, Credit Card Processing, Parking Stickers and Loan Repayment	\$0.00
2001	Granted	To purchase display, tagging, and laundry equipment for clothing donation program	\$1,130.00
2003	Denied	Re-open retail and service facility	\$0.00

2007	Granted	To purchase equipment for resale store of women's workforce clothing and display case	\$2,500.00
2008	Denied	Supporting Progress Towards Women's Economic Self-Sufficiency	\$0.00
2009	Granted	To pay rent and purchase boxes for storage facility	\$1,781.88
2011	Denied	Maximized impact: Addressing the needs of the clothing voucher recipients with extended store hours	\$0.00
2013	Denied	The Green Side of Pink	\$0.00
2014	Granted	To purchase an Apple iPad Air with Wifi, a Square Point-of-Sale System and supporting components, and an iPad compatible projector	\$1,621.43
2015	Granted	Year's salary to executive director, for funding assistance, and software and computer hardware requests	\$7,000.00
2016	Granted	To pay for the salary of the Success Institute Coordinator	\$10,000.00
2017	Denied	Ready-2-Work Experience Training Pilot Program	\$0.00
2018	Granted	Ready-2-Work Program and Technology Equipment	\$9,490.00
2019	Granted	Pilot project online sales coordinator	\$9,474.00
2020	Denied	Continuing Client Services in the midst of COVID	\$0.00
2021	Granted	Supplement the salary of an Assistant Store Manager	\$22,400.00
2022	Granted	Securing the Services of Employment Services	\$12,000.00

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**Staff Comments:**

Request for operational funding to pay for a pilot project.

Application notes that agency is consulting with Monroe County Building Department re: any necessary permits/air venting that would be needed – committee might ask about the status of these inquiries.

Committee should inquire whether any of the itemized program elements are must-haves for the project to proceed.

# APPLICATION SUMMARY

Name of Lead Agency:

New Hope Family Shelter dba New Hope for Families

Name of Project to be Funded:

**Early Learning Center Food Program**

Amount Requested:

**35,000**

Number of City Residents Served:

**160**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
20	20	75

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

New Hope for Families provides shelter and early learning programs to keep families together and lift every child into a promising future.

**Project Synopsis:**

Our early learning program, which primarily serves children affected by homelessness, needs bridge funds to stabilize our program budget against inflation. One of our program distinctives is providing free, nutritious meals because we serve a low-income, vulnerable population. The project would fund part of our food program, endangered by inflation.

**Need Addressed:** (i.e. food, shelter, childcare)

Food, Early Childhood Education, Employment, Family Homelessness

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. 3 months of ELC Food Program	\$17,500
2. 3 months of ELC Food Program	\$17,500
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>35,000</b>
<b>Total Project Cost</b>	<b>\$66,689.00</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2011	Granted	To construct a handicapped accessible bathroom and laundry at the 409 W. 2nd Street facility.	\$14,000.00
2012	Granted	The 301 project	\$9,400.37
2013	Granted	To pay for an external audit, program materials for the Love and Logic Program and improvements	\$8,025.00
2014	Granted	1) To pay for the following components of the New Hope Children's Program: the salary of the full-time Director, wages of one or more interns, furnishings, appliances, materials and equipment. 2) To pay for the purchase and installation of security system at 303 W. 2nd Street.	\$11,519.43
2015	Granted	To renovate a property as a childcare site and family education center for the clients of New Hope for Families.	\$16,600.00
2016	Granted	A corded telephone system linking New Hope offices; desktop and laptop computers; security system monitor	\$13,382.00
2017	Granted	To purchase outdoor educational items for the New Hope Early Child Development Center and a shed	\$12,091.00
2018	Granted	8-Passenger Vehicle	\$25,000.00
2019	Granted	Camp attendance costs and equipment	\$12,653.00
2020	Granted	Family Stability Program	\$13,000.00
2020	Granted	Strong Healthy Families	\$14,020.00
2020	Denied	Evidenced-Based Therapeutic Play for At-Risk Families	\$0.00
2021	Granted	Appliances and furnishings for new shelter (washer/dryer, beds, refrigerators, oven/stoves, dishwashers)	\$35,000.00
2023	Granted	Purchase outdoor equipment for children using classroom and shelter playground	\$21,711.00

### **Staff Comments:**

Request for bridge funding to cover increased cost of food.

# APPLICATION SUMMARY

Name of Lead Agency:

New Leaf, New Life

Name of Project to be Funded:

Reducing Recidivism: Reentry Case Management

Amount Requested:

\$8,846.96

Number of City Residents Served:

1,460

Number of Employees:

Full-Time	Part-Time	Volunteers
3	1	~10

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

To support individuals who are currently/recently incarcerated with their reentry back into our community.

Project Synopsis:

We are requesting \$8,846.96 to assist with salary expenses for two of our full-time case managers. Our case managers provide critical services to our clients (free of charge), and assist some of our community's most vulnerable individuals with navigating the reentry process.

Need Addressed: (i.e. food, shelter, childcare)

Meeting the Essentials: shelter, employment, housing, substance use treatment, health care, SNAP/HIP, low income and historically marginalized groups.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Salary Support – Staff #1	\$4,423.48
2. Salary Support – Staff #2	\$4,423.48
<b>Total Requested</b>	<b>\$8,846.96</b>
<b>Total Project Cost</b>	<b>\$34,560.00</b>



## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2006	Denied	Inmate Transition Program	\$0.00
2007	Denied	Families and Children of Incarcerated Parents	\$0.00
2008	Denied	Hal Taylor House	\$0.00
2009	Granted	To pay for salaries, benefits, and supplies for all New Leaf/New Life programs.	\$14,577.96
2012	Granted	Funding part-time facility manager for transition program	\$9,285.71
2014	Granted	To purchase the following for the New Transition Support Center located at 1010 S. Walnut Street: a washer, a dryer, computers, carrels, a copier, folding chairs, folding tables and a caddy.	\$4,085.71
2015	Granted	Pilot project to provide an additional 20 hours/week of much needed casework capacity at our Transition Support Center.	\$6,000.00
2017	Granted	To provide salary support for the Director of New Leaf-New Life Transition Support Center	\$10,000.00
2018	Granted	New Leaf- New Life Services	\$11,229.00
2019	Granted	Salary for Day-1 support and computer equipment	\$12,090.00
2020	Granted	Transition Supportive Services	\$9,000.00
2020	Granted	Re-Entry Support & Direct Service Items	\$9,540.00
2021	Granted	Salary support and supplies (gift cards, money orders, stamps)	\$12,000.00
2022	Granted	Reducing Recidivism: reentry case management and direct service supplies	\$11,136.90
2023	Granted	Case management services and supplies to incarcerated people	\$7,017.00

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### **Staff Comments:**

Agency is requesting funding for staff support, an expense which has received Jack Hopkins funding for several years now. The committee might ask about the agency's plan for future funding of this operational expense.

# APPLICATION SUMMARY

Name of Lead Agency:

People and Animal Learning Services, PALS

Name of Project to be Funded:

UTV safety vehicle for sensory trail

Amount Requested:

\$12,809

Number of City Residents Served:

Hundreds per year

Number of Employees:

Full-Time	Part-Time	Volunteers
7	11	72

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

PALS promotes joy, quality of life, better health, and empowerment by providing therapeutic programs with horses.

Project Synopsis:

PALS is requesting \$12,809 for the purchase of a UTV for our sensory trail.

In 2023, PALS completed a year-long project of the PALS Sensory Trail. This trail was an \$80k project that created an interactive experience designed for our clients to participate in activities that engage their five senses. Along the half-mile trail clients will have the opportunity to ride or walk their horses through 10 stations that support and encourage sensory perception. This experience in nature is designed specifically for those with autism spectrum disorder and other developmental differences.

The purchase of a UTV is essential as a safety retrieval vehicle for clients in the event of an emergency or in the event they are unable to complete the ride and have mobility issues.

**Need Addressed:** (i.e. food, shelter, childcare)

Accessibility for people with disabilities for safety purposes.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

Capital Investment

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
1. UTV	\$17,809.
2.	
3.	
4.	
5.	
6.	
<b>Total Requested</b>	<b>\$12,809</b>
<b>Total Project Cost</b>	<b>\$17,809.</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2003	Granted	Purchase & install two hydraulic mounting lifts to be used for PALS therapeutic riding program	\$3,400.00
2005	Denied	Leadership camp & copier	\$3,300.00
2006	Denied	Therapeutic arena props & special horse tack	\$1,435.00
2007	Denied	Sponsorship for therapy horse	\$3,900.00
2010	Granted	Provide scholarships for at-risk and disadvantaged youth	\$3,453.57
2011	Denied	T@P: Teens at PALS	\$3,000.00
2012	Denied	PATH Intl. Equine Specialist training certification	\$2,644.95
2012	Denied	COLLABORATION – PALS & BBBS: Project LEAD (Linking Essential Assets for Development)	\$8,755.60
2013	Denied	PALS Facility renovation: HVAC installation	\$34,854.00
2014	Denied	PALS Veterans Program	\$5,000.00
2015	Denied	To fund a hauling vehicle for an Equine Assisted Learning Pilot Program	\$21,855.00
2017	Denied	Sensory Trail and Fencing Construction Project	\$-
2023	Denied	Pay two part-time instructors for expanding special programs	\$22,400.00 (requested)

### **Staff Comments:**

Request for a utility terrain vehicle.

Application does not include number of city residents to be served by the project (app summary says “hundreds”), nor the number of total clients to be served by the project in 2024.

Application states the project could proceed with partial funding, but fails to provide an itemized list of program elements. The committee might want to ask whether a partial award would be of use to the agency.

The application lists a restricted donation from a private donor for \$5,000 toward the project.

The application did not include a response to the question asking when claims for reimbursement would be submitted.

# APPLICATION SUMMARY

Name of Lead Agency:

Planned Parenthood Great Northwest, Hawai'i, Alaska, Indiana,

Name of Project to be Funded:

Safety-Net Sexual and Reproductive Health Services

Amount Requested:

\$7,500

Number of City Residents Served:

98

Number of Employees:

Full-Time	Part-Time	Volunteers
436	146	7,398

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Together we advocate, educate, and provide exceptional health care supporting sexual health, wellness, and reproductive freedom — without judgment, without fear, without fail.

Project Synopsis:

PPGNHAIK will provide low-to-no cost health services for patients who are uninsured, under-insured, and/or living at or below 150 percent of the federal poverty level. Patients can access whatever health service(s) they need no matter their ability to pay for care.

Need Addressed: (i.e. food, shelter, childcare)

Heath care access for patients who are uninsured and/or low-income.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	Contraception	\$5,000
2.	HIV/STI Services	\$1,000
3.	Cancer Screenings	\$750
4.	Gender Affirming Hormones	\$500
5.	Pregnancy Tests	\$250
6.		
<b>Total Requested</b>		<b>\$7,500</b>
<b>Total Project Cost</b>		<b>\$70,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1997	Denied	ADA Approved restrooms and waiting room expansion	\$0.00
1999	Granted	Exam table for individuals who are handicapped	\$5,000.00
2000	Denied	Offset \$34,000 need for program	\$0.00
2001	Granted	To purchase equipment to test for anemia	\$1,394.00
2002	Granted	To purchase an autoclave for the purpose of sterilizing instruments	\$1,495.00
2003	Granted	Purchase four computers for its 421 South College facility	\$3,600.00
2004	Granted	To purchase 6 sets of cervical biopsy equipment	\$2,923.00
2005	Granted	Security cameras and equipment for the facility at 421 S. College Ave.	\$1,500.00
2006	Granted	To install cabinetry and purchase files & furniture for renovation.	\$2,440.00
2007	Granted	Friend to Friend Patient Pass program	\$5,000.00
2008	Granted	To pay for colposcopies for women with abnormal Pap test results	\$2,500.00
2010	Granted	Recession Rx program for City of Bloomington residents	\$5,000.00
2011	Granted	To purchase HIV test kits	\$4,200.00
2012	Denied	Love, Sex, and the Freshman 15	\$4,930.00
2013	Granted	Ensuring Access to Life-Saving Preventative Health Services program	\$4,930.00
2014	Granted	Office visits, exams, STD tests, colposcopies, pap tests, pregnancy tests	\$2,785.71
2015	Granted	Subsidized services, LARCs, testing for STDs, and colposcopies	\$5,000.00
2016	Granted	To pay for LARCs, STD Testing, and Colposcopies	\$3,000.00
2017	Granted	To pay for LARCs, STD Testing, and Colposcopies	\$9,000.00
2020	Granted	For colposcopy equipment and related expenses	\$11,134.00

2020	Granted	Contraception subsidies	\$7,500.00
2022	Granted	Safety-Net Family Planning Services	\$7,500.00
2023	Granted	Family planning services to uninsured, underinsured, and people living below 150% poverty line	\$7,500.00

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**Staff Comments:**

No comments.



# APPLICATION SUMMARY

Name of Lead Agency:

Bloomington Refugee Support Network DBA Refugee Support Network

Name of Project to be Funded:

Newly arriving Asylum Seeker / Refugee Family Transition Support

Amount Requested:

12,000

Number of City Residents Served:

48 families; 180 residents

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	14

Please provide **brief (one or two sentences)** responses here. There is room in the application to expand on each of these questions.

Agency's Mission Statement:

RSN is an all-volunteer nonprofit (501C3). Since 2017, we support newly arriving families that fled violence in their home countries, but are waiting for their work permit, that is delayed due to the backlogged immigration system. This causes great difficulties in feeding and supporting their families. We also provide support to families who arrived as Refugees, but are past the 4-6 month federal financial support program.

Project Synopsis:

This project helps provide financial support to these low income families during this interim period. We coordinate closely with our partner community agencies. These families were successful in their home countries before fleeing violence. Our client families are generally financially independent after this year, and giving back to the larger community.

Need Addressed: (i.e. food, shelter, childcare)

With coordination with our wonderful local partner agencies, RSN financial support includes partial payments for food, rent, utilities, medical support for delayed treatments, transportation, gently used clothing, household items, computers, legal assistance, etc.

Type of Funding Sought: (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

Itemized Costs: (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	Housing, rent assistance	5,000
2.	Utility Assistance	2,000
3.	Medical support	2,000
4.	Transportation support	1,000
5.	Food Assistance	2,000
6.		
<b>Total Requested</b>		<b>12,000</b>
<b>Total Project Cost</b>		<b>50,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2020	Granted	Supporting Bloomington Refugees	\$5,000.00
2021	Granted	Video equipment, garden kits, cases and flyers	\$2,944.22
2023	Granted	Support newly arrived asylum seekers with food, shelter, utilities, essential items	\$4,571.00

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### **Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

South Central Community Action Program

Name of Project to be Funded:

Addressing the Youth Mental Health Crisis

Amount Requested:

\$20,000

Number of City Residents Served:

30

Number of Employees:

Full-Time	Part-Time	Volunteers
92	6	

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

We provide opportunities for all people to achieve personal and economic independence to strengthen our community.

Project Synopsis:

We are seeking \$20,000 to support our goal of leveraging Thriving Connections' proven track record of combining evidence-based practices with community-driven solutions to provide comprehensive support, as well as access to community relationships in youth services, advocacy, and mental health to build capacity in our Youth Program and better support parents in our Adult Program.

Need Addressed: (i.e. food, shelter, childcare)

Mental Health Resources, childcare

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

<b>Item Name</b>	<b>Cost</b>
1. Mental Health Individual Counseling	\$3,000
2. Mental Health Programming, Staffing, and Supplies	\$3,000
3. Positive Childhood Experience Mini Grants for Families	\$6,500
4. Youth Coaching, Enhancing Partnerships, and Professional Development	\$7,500
<b>Total Requested</b>	<b>\$20,000</b>
<b>Total Project Cost</b>	<b>\$28,000</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1997	Denied	Renovation, cribs, cots, strollers and refrigerators	\$0.00
2002	Granted	To establish a revolving loan program for auto repairs of clients	\$5,000.00
2003	Granted	Pay for the development of computer software	\$6,292.00
2005	Granted	Furnishings, equipment and cognitive materials for Head Start classrooms at Templeton and Summit schools	\$8,000.00
2006	Granted	To pay for personnel expenses incurred as part of the Children's Door exchange program.	\$2,230.80
2007	Granted	To purchase and install additional surfacing material for the Arlington Park and Lindbergh Center playgrounds.	\$5,000.00
2008	Granted	To cover salaries, materials, stipends, meals, and childcare for the Circles Campaign pilot project	\$18,000.00
2010	Granted	To pay for parking lot expansion at 1500 West 15th Street.	\$16,521.00
2011	Granted	To pay for salaries for the Circles initiative	\$18,500.00
2012	Granted	STAR Child safety restraint systems- seats, connectors, and shipping	\$6,432.50
2013	Denied	Bloomington Hydroponic Employment and Training Project	\$0.00
2014	Granted	To purchase a hydroponics system for installation at Greenhouse #2 for the Growing Opportunities initiative	\$15,500.00
2015	Denied	To make housing more affordable for low-income citizens in the City of Bloomington by reducing their energy costs.	\$0.00
2016	Denied	Bloomington Weatherization Challenge	\$0.00
2017	Granted	To pay for parenting curriculum and equipment for the Dedicated Dads and Family Development Initiative.	\$3,000.00
2020	Withdrawn	Covering Kids & Families	\$25,000.00
2021	Granted	Video equipment, garden kits, cases and flyers	\$2,944.22

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### **Staff Comments**

The committee might ask whether any of the prioritized items are must-haves for the project to move forward.

# APPLICATION SUMMARY

Name of Lead Agency:

Special Olympics Indiana Monroe County

Name of Project to be Funded:

Upgrade and replacement of Sports Equipment

Amount Requested:

\$1,267.00

Number of City Residents Served:

173

Number of Employees:

Full-Time	Part-Time	Volunteers
		89

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Special Olympics Indiana Monroe County provides year round sports training to individuals with intellectual disabilities. The SOIMC empowers athletes to shatter stereotypes and exceed their personal goals both on and off the field.

Project Synopsis:

Update and replace outdated sports equipment.

Need Addressed: (i.e. food, shelter, childcare)

Equipment

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	(1) Accessible bowling ramp (Champ Ramp)	\$450.00
2.	(76) Practice Pinnies	\$629.00
3.	(8) Basketballs	\$152.00
4.	(3) Track Batons	\$8.00
5.	(8) Equipment / Laundry Bags	\$28.00
6.		
<b>Total Requested</b>		<b>\$1,267.00</b>
<b>Total Project Cost</b>		<b>\$1,267.00</b>



## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2019	Granted	Equipment and Team expansion support	\$5,714
2023	Denied	Athlete Expansion Support	\$3,240.00 (requested)

---

### **Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

Tandem Community Birth Center and Postpartum House, Inc

Name of Project to be Funded:

**Operational Scaling**

Amount Requested:

**\$15,000**

Number of City Residents Served:

**500**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
2	11	200

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

At Tandem, our mission is to improve perinatal outcomes by trusting patients, increasing options for care and challenging the status quo. Our vision is a community where child-bearing families of all kinds have choices in the care they receive and find support and connection during these transformative years.

Project Synopsis:

Our goal is to offset operational costs while we continue to scale our programming during our start-up years.

Need Addressed: (i.e. food, shelter, childcare)

Services and medical care for families with children

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Partial Executive Director and Clinical Director Salaries	10000
2. Partial Utility Costs	1000
3. Partial Rent	4000
4.	
5.	
6.	
<b>Total Requested</b>	<b>15000</b>
<b>Total Project Cost</b>	<b>113058</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2021	Granted	Rent, personnel expenses, supplies, insurance, software & licenses, and utility costs	\$30,000.00
2023	Denied	Fund renovation, furnishing, and launch of services for pilot Post	\$20,000.00

---

### **Staff Comments:**

No comments.

# APPLICATION SUMMARY

Name of Lead Agency:

Wheeler Mission—Bloomington

Name of Project to be Funded:

Outdoor Respite Space For Those Experiencing Homelessness

Amount Requested:

\$13,725.11

Number of City Residents Served:

963

Number of Employees:

Full-Time	Part-Time	Volunteers
10	0	784

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Wheeler Mission—Bloomington welcomes individuals experiencing homelessness as they are onto our Westplex Avenue campus offering critically-needed and timely services.

Project Synopsis:

Wheeler Mission—Bloomington is asking the City of Bloomington's City Council to administer \$13,725.11 through the Jack Hopkins Social Services Grant program to purchase outdoor furniture for our guests experiencing homelessness to enjoy during their stay.

Need Addressed: (i.e. food, shelter, childcare)

Emergency Shelter, Food, Clothing, Community and Personal Safety, and Crisis Services.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

Item Name	Cost
1. Seven 46" Round Metal Picnic Tables	\$7,070.00
2. Five 6 Feet Metal Benches With Backs	\$2,725.00
3. Four Thermoplastic Receptacles With Bonnet Lids	\$1,996.00
4. Seven Umbrellas Opening 9 Feet Wide	\$1,260.00
5. Shipping of Outdoor Furniture	\$674.11
6.	
<b>Total Requested</b>	<b>\$13,725.11</b>
<b>Total Project Cost</b>	<b>\$13,725.11</b>

## For Office Use Only

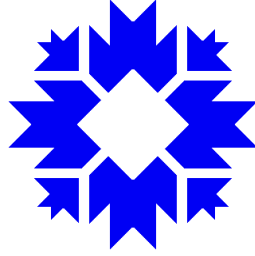
### **Past SSF Funding:**

Year	Status	Title	Amount
2016	Denied	Eight-passenger van	\$0.00
2017	Granted	To pay for security cameras and associated equipment for the Center for Women and Children	\$2,044.00
2018	Granted	Expand Capacity	\$25,000.00
2019	Granted	Increased safety and security for the most vulnerable	\$12,726.00
2020	Granted	Safety and shelter during COVID-19 crisis	\$17,000.00
2020	Granted	Shelter and case management for homelessness COVID-19	\$12,990
2022	Granted	Case Management for those Experiencing Homelessness	\$13,390.00
2023	Denied	Wages for emergency shelter services case manager	\$17,139.20

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### **Staff Comments:**

No comments.



**City of Bloomington  
Office of the Common Council**

**Jack Hopkins 2024**

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**Collaborative Application Summaries**



# APPLICATION SUMMARY

Name of Lead Agency:

Beacon, Inc.

Name of Project to be Funded:

Crawford community rooms repairs

Amount Requested:

\$10,930

Number of City Residents Served:

130

Number of Employees:

Full-Time	Part-Time	Volunteers
25	3	~1500

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

Beacon is a solutions-driven, antipoverty organization, dedicated to aiding and empowering people experiencing extreme poverty, especially hunger and homelessness.

Project Synopsis:

Beacon and Continental Mgt. are requesting \$10,930 for the repair of water damage in the community rooms, exercise room, and the computer lab, and to convert the computer lab into a health clinic room. We also want to purchase a locking cabinet for medical supplies.

Need Addressed: (i.e. food, shelter, childcare)

Health care, mental health care, drug addiction, food.

**Type of Funding Sought:** (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

**Itemized Costs:** (in order of priority)

	<b>Item Name</b>	<b>Cost</b>
1.	Renovations to 4 rooms	\$10,800
2.	Purchase of locking cabinet	\$130
3.		
4.		
5.		
6.		
<b>Total Requested</b>		<b>\$10,930</b>
<b>Total Project Cost</b>		<b>\$10,930</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
2003	Granted	Pay for six phone sets and install three new phone lines at its 219 East 4th Street facility	\$1,900
2004	Granted	To pay for a part-time Food Service Coordinator to expand its breakfast & lunch program	\$5,500
2005	Granted	Vertical lift for Shalom Center annex at 110 S. Washington St.	\$9,000
2006	Granted	To purchase a communication system and a technology system network that includes both server and software to be installed at 110 South Washington, Bloomington, Indiana	\$7,809.18
2007	Granted	To purchase and install a three-compartment deep well sink and convection oven for the Shalom Community Center	\$5,450
2008	Granted	To purchase and install food service equipment for the Shalom weekday food program	\$11,030
2009	Granted	To purchase food as well as kitchen and miscellaneous supplies	\$18,000
2010	Withdrawn	Emergency Hunger Relief	\$0
2011	Granted	To pay for renovations to expand facility at 620 S. Walnut	\$19,000
2012	Granted	A safer and savvier Shalom	\$15,794
2012	Denied	Homeless case manager	\$0
2013	Granted		\$20,900
2014	Granted	To pay for the following components of the Homelessness Assessment & Information Systems initiative: a server, laptops and accessories, computer upgrades, software, guest Wi-Fi, dual monitors, and installation costs of all the aforementioned.	\$12,996.14
2015	Granted	To purchase 4 washers, dryers, and PureWash systems to allow us to continue to provide laundry services	\$6,800
2016	Granted	To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place	\$25,000
2017	Granted	To pay for two months of operational funding for emergency, overnight sheltering at A Friend's Place	\$29,106

2017	Granted	To purchase Chromebook computers and internet access for residents and Staff support	\$27,949
2018	Granted	Phone System	\$13,740
2018	Granted	Crawford Homes II Housing First Program	\$10,800
2019	Granted	Water-efficient toilets, washer and dryers and freezer	\$12,502
2019	Granted	Fingerprint locks	\$8,498
2020	Granted	20th Anniversary Upgrade	\$21,000
2020	Granted	Shalom Covid Response	\$17,500
2021	Granted	Rent and utility support for up to 200 households	\$25,000
2022	Granted	Housing Fast - providing quick access to the major financial barriers to finding a new home: application fees and security deposits.	\$18,750
2023	Granted	Smorgasbord for Shalom to fund equipment and goods to improve kitchen and day center services	\$12,446

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**Staff Comments:**

Collaborative application between Beacon and Continental Management.

The Committee might ask whether the “Repairs to Common Areas” request for \$10,800 is something that could proceed with partial funding, and what partial funding would allow the agency to do within that request.

# APPLICATION SUMMARY

Name of Lead Agency:

**Bloomington Food and Farm Council DBA Bloomington Food Policy Council**

Name of Project to be Funded:

**Nutrition Security: Giving Vulnerable Families access to nourishing foods**

Amount Requested:

**\$19,545.60**

Number of City Residents Served:

**80-110**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
		5

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

The Bloomington Food and Farm Council dba Bloomington Food and Policy Council (BFPC) is a group of community members committed to building food security by assessing the current food system. We achieve this by advocating for policy changes to improve it, and educating the public on concrete steps we can collectively take to assure everyone has access to affordable and nutritious food; with an emphasis on food produced regeneratively by local farmers and gardeners.

Project Synopsis:

Bloomington Food Policy Council requests \$19,545.60 to fund 16 weeks of food support for 14 families at Middle Way House and 8 families at Tandem Community Birth Center & Postpartum House. Every week families will choose a CSA delivery of \$85 worth of local nutrient-dense produce, eggs, bread, and meat. (\$33 produce share, \$40 meat share, \$7 bread, \$5 dozen eggs) We are requesting these funds to provide nutritional security to

vulnerable families in the city of Bloomington who otherwise do not have a choice about the quality of food they consume.

Need Addressed: (i.e. food, shelter, childcare)

Nutrient Dense Food to vulnerable families

Type of Funding Sought: (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

X Collaborative Project

Other (Please Specify)

Itemized Costs: (in order of priority)

Item Name	Cost
1. Nutrient Dense Food (produce, meat, bread, dozen eggs)	\$16,889.00
2. Staffing	\$2,400.00
3. Delivery Fees	\$256.00
<b>Total Requested</b>	<b>\$19,545.00</b>
<b>Total Project Cost</b>	<b>\$32,576.00</b>

## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount

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### **Staff Comments:**

Collaborative application between Bloomington Food Policy Council and Tandem Community Birth Center. Bloomington Food Policy Council is a first-time applicant, though the Food Policy Council was involved with a 2023 application for Jack Hopkins funding submitted by the People’s Cooperative Market (as PCM was not, itself, a 501(c)(3) organization).

# APPLICATION SUMMARY

Name of Lead Agency:

Stone Belt Arc, Inc.

Name of Project to be Funded:

**Job-A-Palooza**

Amount Requested:

**\$6,000**

Number of City Residents Served:

**200**

Number of Employees:

<b>Full-Time</b>	<b>Part-Time</b>	<b>Volunteers</b>
328	116	10

**Please provide brief (one or two sentences) responses here. There is room in the application to expand on each of these questions.**

Agency's Mission Statement:

We believe in the uniqueness, worth, and right to self-determination of every individual. Therefore, it is our mission, in partnership with the community, to prepare, empower, and support people with developmental disabilities and their families to participate fully in the life of the community.

Project Synopsis:

We are requesting \$6,000 to facilitate Job-A-Palooza for people of all ages and disabilities in October during Disability Employment Awareness Month. Job-A-Palooza is an event in which Stone Belt Arc provides a day of job exploration. Over 20 local employers will come to a one-day event, and each will set up a table and administer multiple job tasks to participants, who are adults with developmental disabilities. Participants can try job tasks from each employer and ask questions about employment. This year, we anticipate more computer-related tasks, multi-step tasks, and general and entry-level tasks such as cleaning and restaurant work. Participants will also practice their interview skills by completing a mock interview.



Need Addressed: (i.e. food, shelter, childcare)

Employment support for individuals with disabilities. This project assists individuals with disabilities, who historically fall into the low-income bracket, to find and maintain employment.

Type of Funding Sought: (check all that apply)

Capital Investment

Operational Funds

Bridge Funding

Pilot Project

Collaborative Project

Other (Please Specify)

Itemized Costs: (in order of priority)

Item Name	Cost
1. Venue	\$650
2. Participant materials	\$650
3. Volunteer materials	\$1,600
4. Marketing	\$600
5. Decorations	\$300
6. Food and drink for volunteers and employers	\$1,200
7. Participation incentives	\$1,000
<b>Total Requested</b>	<b>\$6,000</b>
<b>Total Project Cost</b>	<b>\$6,000</b>

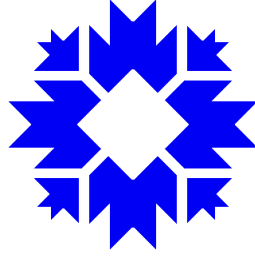
## For Office Use Only

### **Past SSF Funding:**

Year	Status	Title	Amount
1997	Granted	Primary network server for computer system	\$15,000.00
1999	Granted	Industrial sewing machines	\$4,000.00
2000-June	Granted	Equipment & software for “compuplay” facility for children with disabilities	\$11,500.00
2003	Denied	Architectural fees	\$35,000.00
2004	Denied	Wheelchair lift	\$20,818.00
2005	Granted	Salary for Curriculum Specialist for new Career Advancement program	\$5,000.00
2007	Granted	Renovate quadrant of manufacturing center for production of client-designed and manufactured fine art pieces	\$7,746.00
2011	Granted	Pay for computers, scanners, other equipment & software to implement the Electronic Health Record program	\$7,700.00
2014	Denied	Energy Efficient Windows for 6 Group Homes	\$65,560.00
2015	Granted	To fund eight, 3-hour Ivy Tech management/supervisory classes for 20 frontline managers and 6 future managers	\$9,000.00
2022	Granted	Job-A-Palooza and an ALL Abilities Health and Arts fair for people of all ages and all abilities	\$7,250.00
2023	Denied	Update flooring in group home	\$24,360.70

### **Staff Comments:**

Collaborative project with Stone Belt Arc as lead agency, with several other participating agencies listed.



**City of Bloomington  
Office of the Common Council**

Jack Hopkins 2024

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Individual Applications

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	200

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Alexandra's Army recruits and trains kids to perform neighborhood food drives in order to help end local food insecurity. Additionally, the organization provides leadership development opportunities to local youth.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT COSTS

---

**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

\$1000 from Duke Energy (already secured)  
\$2500 from Community Foundation (anticipated)

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We expect to draw down all funds before the end of calendar year 2024. We will likely proceed with a reimbursement, opposed to entering into an Obligation for the City to pay.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

We will have an additional \$2500 to raise, which is currently pending. We expect that to be solidified by July 2024.

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** *(e.g., other funds, in-kind contributions, or volunteers.)*

This project expense is significant, yet necessary to expand within our community. We are seeking only 65% of the total budget from the Jack Hopkins Fund, and will raise the remainder of the funds from our local business community and local foundations. We have already secured some of this funding.

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to the 2020 SCAN, 35% of Monroe County families are not meeting essential needs. Alexandra's Army was founded in 2020 in response to the growing need to combat local hunger. We are an all kid-run organization whose primary mission is to collect non-perishable food donations, but we also provide experiences for youth to get involved in their community. Alexandra's Army recruits and trains children of all ages to perform a food drive in their own neighborhoods. The participants knock on doors and discuss the project with neighbors while asking them for food donations. Our participants gain experience with public speaking and become aware of community involvement, and those with which they speak are offered the opportunity to get involved. It's a win, win, win situation! Over 800,000 Hoosiers are currently suffering from hunger . . . nearly a quarter million of them children. Since inception, Alexandra's Army has raised more than 14,000 pounds of food in support of ending local hunger.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Our technology upgrade project is not ongoing operational funding and is a one-time request to help us complete a project and leverage other funding. We are fortunate to operate from an all-volunteer team, so we maintain an extremely low operational budget, which we are able to maintain through corporate sponsorship and private donations.

This project is beyond our current financial capacity, but essential in our

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Alexandra's Army is proud to be award recipients of Bloomington's SWAGGER Award, Be More Award, and the Hoosier Hills Foodbank's Hunger Action Award.

This community-wide recognition is even more impressive considering the organization was founded by an 8 year-old and her friends.

After completing 3 large-scale community food drives, we have arrived at the point where we need to capitalize on technology in order to expand our reach.

Thousands in our community are served through the efforts of Alexandra's Army, each year!

Those experiencing food insecurity; the hundreds of kids becoming familiar with community service for the first time; the thousands of residents that are being offered the opportunity to get involved by contributing food; Our Community Sponsors, their employees, and their customers/clients; and, all of those connected with the Hoosier Hills Food Bank, the organization which receives the donation of our participant efforts.

Investing on Alexandra's Army is harmonious with Bloomington's Community Action Plan. We are not just tomorrow's leaders, we are today's leaders.

The future impact of this grant is limitless!



## Alexandra's Army 2024 JHSSF App Narrative

(that did not fit into template)

**PROJECT SYNOPSIS (200 words or less) Describe the project to be funded. Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."**

Alexandra's Army, Bloomington's only kid-run 501 (C) 3 Non-profit organization, requests \$6150 from the Jack Hopkins Fund, broken down into two aspects of our necessary 2024 technology innovation.

\$3650 of the budget is set aside for a year-long website editing training and professional development for our leadership team. The remaining \$2500 is for matching funds to design of a mobile app to ease and increase recruitment and overall communication. Part of this budget also includes costs for 5 additional Chromebooks for our expanding leadership team.

We wish to grow our community impact through a more impactful digital-presence.

The website and use of technology is instrumental to our success. Our organization's leadership is comprised of Bloomington youth; this training is imperative.

We have secured commitment from one of the Bloomington's best website trainers, local, woman-owned business, Socially Up, specializing in what we need. They have reduced their price because they are strong believers in our mission.

Our soon to be developed (with your help) Mobile App in anticipated to increase recruitment by 70%.

Thanks for your consideration! Imagine the leaders of tomorrow obtaining the professional development they need to stay engaged within Bloomington's community . . .

**NEED (200 words or less) Explain how your project addresses a previously-identified priority for social services funding as documented in the Service Community Assessment of Needs, the City of Bloomington, Housing and Neighborhood Development Department's 2020-2024 Consolidated Plan, or any other community-wide survey of social service needs. This project expense is significant, yet necessary to expand within our community. We are seeking only 65% of the total budget from the Jack Hopkins Fund, and will raise the remainder of the funds from our local business community and local foundations. We have already secured some of this funding.**

Your hopeful support will be the catalyst to leverage the necessary additional funding to move forward. Knowing that the City of Bloomington and this esteemed Board is on board as a partner is significant encouragement for the sources of the remaining

According to the 2020 SCAN, "having access to an adequate food supply continues to be a problem for some individuals and families. Hunger can be associated with homelessness, poverty, and unemployment."

Bloomington's action plan falls within the exact scope:

“ . . . essentials help individuals and families meet basic needs with access to food, shelter, healthcare, and emergency crises. Strategies include investing in programs providing these essentials . . . ”

Alexandra's Army, founded in 2020 in response to growing need to combat local hunger, is an all kid-run organization whose primary mission is to collect non-perishable food donations, but we also provide youth experiences to get involved in their community. Alexandra's Army recruits & trains children to perform a neighborhood food drive.

Participants knock on doors and discuss the project with neighbors while asking for food donations. Participants gain experience public speaking and become aware of community involvement, and those with which they speak are offered the opportunity to get involved. A win, win, win situation!

Over 800,000 Hoosiers are currently suffering from hunger . . . a quarter million children. Since inception, Alexandra's Army has raised over 14,000 pounds of food in support of ending local hunger.

**ONE-TIME INVESTMENT (100 words or less) Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion. If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.**

Our technology upgrade project is not ongoing operational funding and is a one-time request to help us complete a project and leverage other funding. We are fortunate to operate from an all-volunteer team, so we maintain an extremely low operational budget, which we are able to maintain through corporate sponsorship and private donations.

This project is beyond our current financial capacity, but essential in our growth and efficiency. We want to continue to make such a positive impact in the community but require the tools and training to do so.

**LONG-TERM BENEFITS (200 words or less) How will your project have broad and long-lasting benefits for our community?**

The long-term benefit is mostly the ability to become more self-sustaining. With the training we will receive, we can update our website regularly and put together a blog with social media integration. The App which we require to handle an increase in recruitment is self-determining in terms of tracking progress.

These benefits will allow us to reach more people so that Alexandra's Army can recruit more children to perform the Annual Community Food Drive. With more participants, we can collect more food. With more food, we can have a greater impact on reducing local hunger. Our future capacity will be to have those being trained to become future trainers, themselves. This is part of the long-term goal of our organization to grow and become more successful.

**OUTCOME INDICATORS (100 words or less)** Describe the outcome indicators to be used to measure the success of your project. The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. Example: an agency providing a service might cite to the number of persons with new or improved access to a service. Total increased participation and the collection of food is the absolute direct indicator, so to help our mission of reduced hunger, however, there are other measurable deliverables.

The tracking will be simple, as this is a straightforward training program. Participant proficiency at the end of the year will be the determination of success. The evaluation of effectiveness upon the community will be more abstract, although determined through the ability to effectively use technology to promote the organization, therefore, having an invaluable and lasting impact on Bloomington and beyond.

**OTHER COMMENTS (500 words or less)** Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing. Alexandra's Army is proud to be award recipients of Bloomington's SWAGGER Award, Be More Award, and the Hoosier Hills Foodbank's Hunger Action Award.

This community-wide recognition is even more impressive considering the organization was founded by an 8 year-old and her friends.

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Investing on Alexandra's Army is harmonious with Bloomington's Community Action Plan. We are not just tomorrow's leaders, we are today's leaders.

The future impact of this grant is limitless!

# Alexandra's Army

## 2024 Technology Project JHSSF Budget



**Total Project Cost: \$ 9650.00**

Funds:

JHSSF Grant \$ 6,150.00p

Other Grants \$ 2,500.00

**Total \$ 9,650.00**

Itemized Expenses:

Mobile App Development \$ 6,000.00

Web Training Consultants: \$ 2,750.00

Marketing & Materials \$ 200.00

Chromebook (5) \$ 700.00

**Total \$ 9,650.00**

*The next generation of community leaders are already working toward solutions. Please visit our website for more information on our efforts: [www.AlexandrasArmy.org](http://www.AlexandrasArmy.org).*



# Alexandra's Army

## 2023 Financial Statement

<b>Beginning Calendar Year Balance:</b>	<b>\$ 3,323.16</b>
Sophia Travis Grant	\$ 2,200.00
Board of Realtors Grant	\$ 1,000.00
Sponsorship	\$ 1,750.00
Calendar Year Expenses	\$ 3,928.88
<b>Ending Year Carry Over</b>	<b>\$ 4,345.28</b>

*The next generation of community leaders are already working toward solutions. Please visit our website for more information on our efforts: [www.AlexandrasArmy.org](http://www.AlexandrasArmy.org).*



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
P.O. Box 2508  
Cincinnati, OH 45201

ALEXANDRAS FOOD DRIVE INC  
C/O ALEXANDRAS ARMY  
1501 WEST EDINBURGH BEND  
BLOOMINGTON, IN 47403

Date:  
04/16/2022  
Employer ID number:  
85-3969797  
Person to contact:  
Name: Customer Service  
ID number: 31954  
Telephone: 877-829-5500  
Accounting period ending:  
June 30  
Public charity status:  
509(a)(2)  
Form 990 / 990-EZ / 990-N required:  
Yes  
Effective date of exemption:  
July 13, 2020  
Contribution deductibility:  
Yes  
Addendum applies:  
No  
DLN:  
26053495007212

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

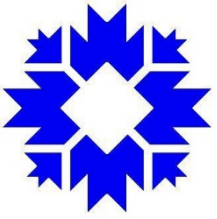
If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** All-Options

**Address:**

1014 S Walnut Street Bloomington, IN 47401
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**Phone:** 812-558-0089

**E-Mail:** info@alloptionsprc.org

**Website:** www.alloptionsprc.org, www.all-options.org

**President of Board of Directors:** Dana Huber

**Name of Executive Director:** J. Parker Dockray

**Phone:** 510-817-0781

**E-Mail:** parker@all-options.org

**Name of Grant Writer:** Jessica Marchbank

**Phone:** 812-558-0089

**E-Mail:** jess@all-options.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
13 (org); 2 local	1 (org)	10 locally

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

At All-Options Pregnancy Resource Center, we trust and support people through every reproductive turning point, including pregnancy, parenting, abortion, adoption, infertility, and pregnancy loss. These issues are complex and each person's reality is different, but we know one thing for certain: Everyone deserves all options.

All-Options PRC is a secular, client-centered organization where everyone is welcome. We are proud to offer judgment-free and compassionate support for our local community including free pregnancy tests, peer counseling, diapers, safer sex supplies, period supplies, and referrals to community partners, all under one roof. Our Hoosier Diaper Program strives to meet the overwhelming, often overlooked need for diapers and diapering supplies for local families of infants and toddlers who are struggling to make ends meet. Our goal is to provide cloth and disposable diapers to keep little ones clean, dry, and healthy, while also supporting families in increasing their economic stability and parenting with dignity.



## PROJECT INFORMATION

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Name of the project to be funded:

All-Options Hoosier Diaper Program

Total cost of project: \$40,000

Requested amount of Jack Hopkins funding: \$7,500

Number of City residents to be served by this project in 2024: 1500

Number of clients to be served by this project in 2024: 450

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$7,500 to help us continue to meet dramatically increased demand for the essential supplies every family with a baby or toddler needs: diapers, wipes, hygiene supplies, and support in transitioning out of diapers. Since 2015, the All-Options Hoosier Diaper Program has provided compassionate, judgment-free support to local families by providing essential supplies like diapers, wipes, diaper cream, and pregnancy tests to help meet the diaper need gap, so that families can keep their little ones safe, dry, and healthy. Over the past several years, we have seen the number of families experiencing diaper need skyrocket, with an over 100% increase in local diaper need. We have continued to improve our efficiency, paring down our expenses while continuing to fundraise and seek funding from several sources. Still, at least 25 new families request our assistance every month, and we are striving to meet the increased demand. Early in 2024, we launched our Potty Training Support Program, which is intended to aid families in navigating their little ones' transition out of diapers. We hope to continue this momentum and provide more robust support for the whole family, to include a wider range of hygiene and self-care supplies.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

While not strictly a collaborative project, we have continued to deepen ties to other local agencies in an effort to streamline programs and not duplicate efforts other agencies are making.

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

pending: Glassybaby Foundation (\$5000), Sophia Travis (\$4000), Walmart (\$2000)  
Confirmed (though amount TBD): Persisterhood Workshop, Indiana State Diaper Bank Pilot Project (a collaborative project with a coalition of diaper banks throughout the state to bring diapers to underserved areas including Monroe County), coordinated community diaper drive for May-July 2024 (5,000), Individual donations & sponsorships (\$3500)

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Once we know what our total funding for this project will be, we will place an order in bulk through a supplier with whom we have a discounted purchasing agreement. After placing the order for supplies, we will submit our claim for reimbursement no later than Nov 1, 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We can clearly demonstrate the extent of diaper need in our community - hundreds of local families are experiencing diaper need, and also report difficulty in getting and keeping a job, due to myriad factors including lack of access to diapers, hygiene items, and other basic needs. The economic need being experienced by local families is both compelling and undeniable. A Volunteer Coordinator was recently added to our staff, which will help us to significantly broaden our outreach efforts to community organizations for diaper drives and sponsorships.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Diapers	\$3,000
Priority #2	Potty Training Supplies	\$500
Priority #3	Menstrual Hygiene Support	\$1500
Priority #4	Hygiene Supplies	\$2500
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$7,500</b>

# JACK HOPKINS FUNDING CRITERIA

---

## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Our Hoosier Diaper Program supports hundreds of Bloomington-area families each month in caring for their children with dignity. Our clients include single mothers who are struggling to pay for the diapers required at their child's daycare; married couples who have been cutting back on groceries and other essentials to come up with the \$80-100 per month they need to buy diapers for each child; and grandparents who have taken unexpected custody of their grandchildren when a parent is incarcerated or affected by drug addiction. Before finding All-Options, clients have reported trying to stretch their diaper supply by reusing diapers, waiting longer to change dirty diapers, or using old clothing and sheets as makeshift diapers. The need is desperate, overwhelming, and unacceptable. We must take action to ensure that all Hoosier babies and toddlers have the clean diapers they need. Every dollar helps us serve more families in need. Providing these supplies to a family may mean the difference between a parent going to school or having to stay home; it may mean making sure the lights stay on AND that their child has enough diapers to stay clean, dry, and healthy.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Diaper need is a massive, systemic issue. We can't solve the systemic issues, but we can close the gap for Bloomington families, allowing them to focus on their other needs. For the Hoosier Diaper Program, diapers are - and will always be - an ongoing client service expense. Along with providing diapers and other essentials we are already providing, the potty training support program helps ease & support the transition away from diapers that some families are struggling to make. In these two ways, 1) by supporting families with babies & toddlers who can't afford diapers and 2) by supporting families in their transition out of diapers, we hope to close that diaper need gap, just a little more, right here in Bloomington.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Because diaper need is such a pervasive and systemic issue, it has far-reaching consequences: families experiencing diaper need face the daunting struggle of having to choose between diapers and other necessities like rent, food, utilities, or other necessities. According to an analysis by the Center for Economic and Policy Research, the poorest 20% of families in the US spent almost 14% of their household income on diapers in 2014. Parents in poverty can get food and clothes at a pantry or with food stamps, but this does not apply to diapers. Diaper need and poverty become a vicious cycle. For so many families, where there is one, there is the other. Access to clean diapers has a positive impact on the emotional, physical, and economic health of children and families. Just as the poverty cycle has a perpetuating negative impact, changing one element of this cycle can have far-reaching positive impacts. Removing one burden for a family (a month's supply of diapers) has a positive impact on that entire family, and extended to hundreds of families in Bloomington, on the community, as more parents will be able to focus on their families other needs, like school and work.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

All-Options is committed to evaluation of all of our programs, and we regularly improve our programs based on client feedback. We continue to invite all clients to provide feedback, and assess their satisfaction with the information, resources, and support provided, as well as how receiving services at All-Options impacts their lives.

- \* 30% increase in families "graduating" from diapers by age 3.5, and overall decrease in the length of time a family needs diaper support
- \* Parents & caregivers will feel more supported in their parenting, especially around toilet training, and able to successfully help their children transition from diapers to underwear
- \* Parents & caregivers are able to receive necessary basic hygiene items to help support their health, wellness, and ability to seek employment/education.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

We recognize that there are other agencies locally providing things like soap/shampoo, and even diapers - and we're grateful these program exist! However, none offer these supplies on a more consistent, ongoing basis (like monthly) and often the supplies are only available 1-3 times per year, which means clients in need have to jump through additional hoops and visit more agencies just to secure their most basic needs. Our aim is to provide more wrap-around supports under one roof, where a family can receive most of their basic (non-food) needs at one time, and can request them every month if needed.

Some notable quotes from recent client feedback surveys include:

"I really don't know what I would do without the support you've given us. I'm struggling to pay bills every month and the diapers you give us are a godsend, and now with my twins starting their periods and you have us covered with pads, I could cry! Every month this is one thing I know we won't have to worry as much about."

"Thank you very much for everything. This is my last order. Without your help, life here would be more difficult for our family. I appreciate your help and patience during this process."

"It's been a great help for me that I got to know about all options. My husband is a student and we are a family of 4 with one toddler and 1 baby. We can save money for other important things as we are getting diapers and other necessary things from this place. Otherwise it'd have been very tough for us. Thank you."

"It is a blessing to have resources in the community to help my family. Since closing my business and my twins being born, the cost have having a family has doubled while our own resources have been cut in half. Having any kind of help is a major load off to our family."

Since 2015, All-Options' Hoosier Diaper Program has provided more than 2.5 million diapers to low-income children and families in Bloomington and Monroe County. Partner organizations like Middle Way House, Beacon, New Leaf – New Life, and Mother Hubbard's Cupboard refer clients to us, and during the past years, we have deepened our relationship with these partner agencies - sometimes by also providing supplies for those agencies to distribute. Without a grant from the Jack Hopkins Social Services Committee, we will continue doing what we have always done -- but potentially to fewer families, as each dollar directly translates into more diapers we can purchase and distribute.



## 2024 Proposed Project Budget

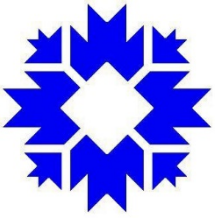
All-Options		Hoosier Diaper Program	
<b>Total Project Cost</b>		<b>\$40,000</b>	
	<b>Totals</b>	<b>Other Income Sources</b>	<b>JHSS Grant</b>
<b>FUNDS</b>			
JHSS Grant	<b>\$7,500</b>		\$7,500
Other Grants		19,000.00	
Other Income Sources		13,500.00	
<b>TOTAL PROJECT FUNDS</b>	<b>40,000.00</b>	<b>32,500.00</b>	<b>7,500.00</b>
<b>EXPENSES</b>			
Diapers	\$33,000.00	\$30,000.00	\$3,000.00
Menstrual Hygiene	\$2,500.00	\$1,000.00	\$1,500.00
Potty Training	\$750.00	\$250.00	\$500.00
Gen Hygiene	\$3,750.00	\$1,250.00	\$2,500.00
<b>TOTAL PROJECT Expenses</b>	<b>40,000.00</b>	<b>32,500.00</b>	<b>7,500.00</b>

# All-Options

## Profit and Loss

January - December 2023

	TOTAL
Income	
4000 DONATED INCOME	
4005 Contributions	
4010 Corporate	3,000.00
4015 Community Partners	8,139.62
4020 Individuals	13,796.17
<b>Total 4005 Contributions</b>	<b>24,935.79</b>
4100 Grants	
4110 Government Grants	7,800.00
4115 Institutional Grants	1,414.27
<b>Total 4100 Grants</b>	<b>9,214.27</b>
<b>Total 4000 DONATED INCOME</b>	<b>34,150.06</b>
4300 MISC INCOME	
4305 Gain on sale of stock	220.70
<b>Total 4300 MISC INCOME</b>	<b>220.70</b>
<b>Total Income</b>	<b>\$34,370.76</b>
GROSS PROFIT	<b>\$34,370.76</b>
Expenses	
7000 OPERATIONS - Non-Labor	
7200 Travel	
7215 Transportation - Ground	147.26
<b>Total 7200 Travel</b>	<b>147.26</b>
7500 Direct Program Client Support	
7515 Client Supplies	887.01
7525 Diapers	31,560.30
<b>Total 7500 Direct Program Client Support</b>	<b>32,447.31</b>
<b>Total 7000 OPERATIONS - Non-Labor</b>	<b>32,594.57</b>
<b>Total Expenses</b>	<b>\$32,594.57</b>
NET OPERATING INCOME	<b>\$1,776.19</b>
NET INCOME	<b>\$1,776.19</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Amethyst House, Inc.

**Address:**

PO Box 11 Bloomington, IN 47402
------------------------------------

**Phone:** 812-336-3570

**E-Mail:** glovell@amethysthouse.org

**Website:** www.amethysthouse.org

**President of Board of Directors:** John Beatty

**Name of Executive Director:** Mark DeLong

**Phone:** 812-336-3570 ext 206

**E-Mail:** mdelong@amethysthouse.org

**Name of Grant Writer:** Gina Lovell

**Phone:** 812-336-3570 ext 203

**E-Mail:** glovell@amethysthouse.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
14	20	7

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Amethyst House provides a foundation for recovery by partnering with individuals, families, and communities impacted by substance-use disorders, offering high-quality residential and outpatient treatment services and guidance for healthy living.

## PROJECT INFORMATION

---

Name of the project to be funded:

Residential Upgrades

Total cost of project: \$41,165

Requested amount of Jack Hopkins funding: \$19,165

Number of City residents to be served by this project in 2024: 125

Number of clients to be served by this project in 2024: 125

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Our request is \$19,165 to assist us with residential upgrades. Our first priority is refurbishing of the historical windows at the Women's house. Current the windows are drafty and not always operational. We need them to be operational for safety reasons. At the Men's House we have carpet that needs to be replaced for safety reason as it is getting buckled up in areas and causes a tripping hazard and one room in-particular had some water damage from a bathroom next door and the carpet needs to be replaced. We want the residents to be feel relaxed, comfortable, and safe in their own facilities.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

n/a

**How do your missions, operations and services complement each other?**

n/a

**What is the existing relationship between agencies?**

n/a

**How will communication and coordination change as a result of the project?**

n/a

**Explain any challenges and steps you plan to take to address those challenges.**

n/a

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

322 W. 2nd St., Bloomington, IN 47403  
215 N. Rogers St., Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

n/a

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

n/a

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

For the window refurbishing project we are working on getting a certificate of appropriateness from the Historical Preservation Committee and approval from the Bloomington Restoration, Inc.

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

\$10,000 from City of Bloomington SEEL grant - confirmed  
\$10,000 from BUEA Facade grant - pending  
\$2,000 from our fall concert - confirmed

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

If granted funds through Jack Hopkins, Amethyst House will schedule the work to be done as soon as possible and will draw down the funds after each priority is completed.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

\$10,000 from City of Bloomington SEEL grant - as soon as the window project has completed  
\$10,000 from BUEA Facade grant - as soon as the window project has completed  
\$2,000 from our fall concert - November 2024

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

\$10,000 from City of Bloomington SEEL grant  
\$10,000 from BUEA Facade grant  
\$2,000 from our fall concert profits



## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Refurbish windows at WH	8,350
Priority #2	Replace carpet at MH	10,815
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$19,165</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Amethyst House has served Bloomington and the surrounding areas for the past 44 years treating those with substance use disorder. We are dedicated to assisting those who need it most. In 2023 we served 141 residential clients, 56 women at our Women's Residential treatment facility and 85 men at our Men's Residential treatment facility. We prioritize IV drug users, pregnant women, and women with dependent children. The majority of our clientele fall below the poverty line, aiding people who are experiencing poverty is another priority of ours. Indiana historically has a significant history with addiction. Since 2020, the CDC has reported exacerbated substance abuse cases throughout the country, including Indiana. In order to effectively address the vicious cycle of homelessness, incarceration, addiction, and instability, individualized treatment plans need to be created. At Amethyst House, that is exactly what we do. We provide unique plans to allow our clients to rebuild their lives during their four month stay which starts them on a path to a healthy lifestyle and reintegration into Monroe County. With the help of the Jack Hopkins funding initiative we hope to continue our trend of improvements throughout 2024.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Refurbishing windows at the Women's house and replacing carpeting at the Men's house are both one time investments and will help to keep our facilities operational for many years to come.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Within the past 4 decades of Amethyst House, we have provided services to thousands of clients, many of whom have not only reintegrated back into society successfully but have been able to apply what they have learned about maintaining a healthy lifestyle for years to come and many of whom have successfully reintegrated into the community. The benefits of recovery are two-fold; in pulling an individual out of the criminal justice system or homelessness, the community is required to allocate fewer resources to remedy those issues. Our goal is to encourage our clients to be the best version of themselves, to find ways in which they can give back. Our success in doing so depends on the quality of services we provide. Constant upkeep is required in all of our residential facilities; the Men's and Women's houses are older buildings that deteriorate quickly, especially with so many residents living in the same area at the same time. Grants help mitigate the financial impact of required renovations to free up other funds that can be used to provide services for our clients.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Increase the value of the properties and reduce short-term upkeep and maintenance spending for the houses. It also prevents major issues in the future. Maintaining our residential facilities also allows us to maintain full capacity when ever possible.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Having been in the Bloomington community since 1980, we pride ourselves on being good neighbors. We work hard to take care of our residential properties. Thanks to grant opportunities like the Jack Hopkins Social Services grant we are able to afford important repairs and remodeling. We strive to create living spaces that are comfortable and supportive of our residents. We also strive to blend in to our neighborhoods and to take care of our properties.

## 2024 Jack Hopkins Project Budget

Amethyst House		Residential Upgrades	
Total Project Cost		\$21,165	
	Totals	Other Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant	19,165		19,165
Other Grants	20,000	20,000	
Other Income Sources	2,000	2,000	
<b>TOTAL PROJECT FUNDS FROM ALL SOURCES</b>	<b>\$41,165.00</b>	<b>\$22,000.00</b>	<b>\$19,165.00</b>
<b>EXPENSES</b>			
Windows refurbishment	28,350	20,000	8,350
Carpet replacement	12,815	2,000	10,815
<b>TOTAL PROJECT EXPENSES</b>	<b>\$41,165.00</b>	<b>\$22,000.00</b>	<b>\$19,165.00</b>

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## window restoration estimate

2 messages

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**jsquared\_constr** <jsquared\_constr@zohomail.com>  
To: vell <glovell@amethysthouse.org>  
Cc: sfitzgerald <sfitzgerald@amethysthouse.com>

Tue, Mar 19, 2024 at 2:32 PM

To Gina Lovell and Steve Fitzgerald,

This estimate is for the restoration of 14 windows in the house at 322 W 2nd street in Bloomington Indiana. My understanding is that the windows must be restored rather than be replaced as the house has a historic designation. Most of these windows are located in the bedrooms and living areas of the residents and should be operable to allow emergency egress. Most of these windows are inoperable and in need of repairs such as paint removal, sanding, scraping, repainting, epoxy wood consolidation, repointing, reglazing or even fabricating a new piece altogether and some need new glass. I propose to remove the damaged sashes rework them at my shop and then reinstall them in a better and more operable condition. I plan to remove the windows not all at once but in sets or small batches, restore them and then after reworking the channels and stops -- reinstall them. I will attempt to minimize disruption to the residents while I do the work as much as possible.

This estimate is for working on the sashes, channels, stops, and sills as needed to get the windows working and does not include work on the exterior trim. In some cases both sashes are in need of work but a couple windows only the lower sash needs the work and the upper sash is fixed and in good condition. Some wooden pieces may be damaged beyond repair and I may need to fabricate a new piece in my shop. I plan to carefully remove the interior trim and stops to remove the sashes then later replace it with the restored sashes and stops (as needed). Most of the windows move up and down in an aluminum channel - some of which are bent or falling out of the jamb. The channels will be reinstalled, repaired or replaced as needed. Care will be given to retain and reuse as much of the original materials and components as possible. For the large window noted as A in the report I will replace the ropes and reuse the weights as this window still has them and didn't get painted inside or have a metal channel added to the frame. In the case where hardware is missing or broken will try to find replacement hardware that matches the existing hardware as well as possible.

I inspected as many of the windows as closely as I could without actually removing the sashes from the frames and I read over Donna Sink's Window Assessment Report. All the 14 listed windows need varying degrees of work on the sashes, glass, hardware, stops, sills and the channels -- some of which I won't fully know what needs to be done until I have the windows out and start restoring them. Based on my inspection and her report I have come up with a per window unit cost of \$2025 to cover the removal, restoration and reinstalling of the sashes and reworking or replacement of the channels and stops as needed and materials needed to make the windows more operable, protected from the elements and more attractive.

If you accept this estimate and wish to go forward let me know and I can get you on the schedule. Please contact me with any questions or needed clarifications.

Thank you for your consideration,

James Johnston

JSquared Construction  
Bloomington, Indiana  
(812)340-5209

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**Gina Lovell** <glovell@amethysthouse.org>  
To: Steve Fitzgerald <sfitzgerald@amethysthouse.org>

Thu, Mar 21, 2024 at 2:10 PM

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*Gina Lovell*  
Administrative Director  
Amethyst House  
812-336-3570 ext 203  
[www.amethysthouse.org](http://www.amethysthouse.org)

***"Creating a foundation for recovery and healthy living"***

**You can help Amethyst House while shopping by choosing Amethyst House as your non-profit of choice on the Kroger.com Community Support link. A portion of your purchases will go to support Amethyst House without any further effort or charge to you! Thank you for your support!**

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[Quoted text hidden]

Carpets By Don

1111 Orchard Street  
 Mitchell, IN 47446  
 812-849-5100

# Invoice

Date	Invoice #
3/27/2024	1342

<b>Bill To</b>
Amethyst House (Gina) 215 North Rogers Bloomington, Indiana 812-325-0870/Jeana

<b>Ship To</b>
Office at 645 N. Walnut

P.O. Number	Terms	Rep	Ship	Via	F.O.B.	Project
	COD	Don	3/27/2024	Our Truck	Mitchell	

Quantity	Item Code	Description	Price Each	Amount
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----	7.95	198.75
		ROOM # 1-----		
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & R	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM @ 2-----	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & Reset	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM # 3-----	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & R	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM 4 -----	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & R	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM #5-----	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & Reset	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM#6-----	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & Reset	39.00	39.00
25	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM # 8-----	7.95	198.75

THANK YOU FOR YOUR BUSINESS ; PLEASE CALL AGAIN	<b>Total</b>
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Carpets By Don

1111 Orchard Street  
 Mitchell, IN 47446  
 812-849-5100

# Invoice

Date	Invoice #
3/27/2024	1342

Bill To
Amethyst House (Gina) 215 North Rogers Bloomington, Indiana 812-325-0870/Jeana

Ship To
Office at 645 N. Walnut

P.O. Number	Terms	Rep	Ship	Via	F.O.B.	Project
	COD	Don	3/27/2024	Our Truck	Mitchell	

Quantity	Item Code	Description	Price Each	Amount
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
26	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	518.70T
26	Installation	Installation -----ROOM # 9-----	7.95	206.70
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Maintance	Door R & Reset	39.00	39.00T
25	Carpet	Shaw Profusion Color Choioce (Carpet Tile)	19.95	498.75T
25	Installation	Installation -----ROOM # 10	7.95	198.75
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	121.45	121.45
1	Memo	Door R & Reset	39.00	39.00
22	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	438.90T
22	Installation	Installation -----Front Landing-Upper Landind-Hall)	7.95	174.90
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	98.75	98.75
32	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	638.40T
32	Installation	Installation -----Upper Main Hall-----	7.95	254.40
1	Removal	Carpet Removal (Cpt-Padding-Tack-Floor Prep)	189.25	189.25
19	Carpet	Shaw Profusion Color Choice (12' Goods/pad) 12X14	19.95	379.05T
19	Installation	Installation -----Front Stairs-----	7.95	151.05
1	Removal	Carpet Removal (cARPET & pADDING)	98.00	98.00
19	Carpet	Shaw Profusion Color Choice (12'Goods/Pad) 12x14	19.95	379.05T
19	Installation	Installation -----Upper Rear Stairs)-----	7.95	151.05
1	Removal	Carpet Removal ( Carpet & Padding)	98.00	98.00
19	Carpet	Shaw Profusion Color Choice (12' Goods/pad) 12x14	19.95	379.05T

THANK YOU FOR YOUR BUSINESS ; PLEASE CALL AGAIN	<b>Total</b>
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Carpets By Don

1111 Orchard Street  
 Mitchell, IN 47446  
 812-849-5100

# Invoice

Date	Invoice #
3/27/2024	1342

<b>Bill To</b>
Amethyst House (Gina) 215 North Rogers Bloomington, Indiana 812-325-0870/Jeana

<b>Ship To</b>
Office at 645 N. Walnut

P.O. Number	Terms	Rep	Ship	Via	F.O.B.	Project
	COD	Don	3/27/2024	Our Truck	Mitchell	

Quantity	Item Code	Description	Price Each	Amount
19	Installation	Installation -----Rear Lower Stairs-----	7.95	151.05
1	Removal	Carpet Removal (Carpet & Padding)	98.00	98.00
19	Carpet	Shaw Profusion Color Choice (12' goods/pad) 12x14	19.95	379.05T
19	Installation	Installation -----Front Stairs-----	7.95	151.05
1	Removal	Carpet Removal (Carpet & Padding)	98.00	98.00
12	Carpet	Shaw Profusion Color Choice (Carpet Tile)	19.95	239.40T
12	Installation	Installation ----- Upper-LowerStair Landings-----	7.95	95.40
1	Removal	Carpet Removal (Cpt-Padding-Floor Prep)	98.00	98.00
10	Carpet	Shaw Color Choice (12'goods/pad) 12x7	19.95	199.50T
10	Installation	Installation ----Front Basement Stairs-----	7.95	79.50
1	Removal	Carpet Removal (Carpet & Padding)	85.00	85.00
		WE THINK THAT THE COVE BASE IS USABLE AND DOES NOT NEED REPLACED AT THIS TIME, IF IT IS NOT USEABLE THERE WOULD BE EXTRA EXPENSE. ALSO, THIS ESTIMATE DOES NOT INCLUDE FURNITURE REMOVAL AND/OR RESETTING OF THE FURNITURE. IF YOU HAVE ANY QUESTIONS PLEASE FEEL FREE TO CALL ME AT 812-583-3849. School	0.00	0.00

THANK YOU FOR YOUR BUSINESS ; PLEASE CALL AGAIN	<b>Total</b>	\$12,814.25
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Amethyst House  
**Profit & Loss**  
 July 2022 through June 2023

	Jul '22 - Jun 23
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
<b>6000 · DMHA FUNDS</b>	
6010 · Chronic Abuse (CA) Funding	342,260.01
6070 · SABG 103	114,849.56
6080 · SABG 104	312,272.06
	769,381.63
<b>Total 6000 · DMHA FUNDS</b>	<b>769,381.63</b>
<b>6075 · INTECARE</b>	29,312.00
<b>6100 · CLIENT FEES</b>	
<b>Housing Program</b>	
6105 · Residential Tx Fees	31,827.74
6106 · Medicaid - PerDiem	
8995 · Medicaid Per-Diem Write off	-13,346.48
6106 · Medicaid - PerDiem - Other	467,578.86
	454,232.38
<b>Total 6106 · Medicaid - PerDiem</b>	<b>454,232.38</b>
<b>Total Housing Program</b>	486,060.12
<b>OP Treatment</b>	
6110 · Treatment Fees	4,442.00
6153 · Insurance	46,477.96
6128 · Ins. Write Off	-3,062.77
	47,857.19
<b>Total OP Treatment</b>	<b>47,857.19</b>
<b>Total 6100 · CLIENT FEES</b>	<b>533,917.31</b>
<b>6200 · DONATIONS</b>	
6250 · Unrestricted	31,253.32
	31,253.32
<b>Total 6200 · DONATIONS</b>	<b>31,253.32</b>
<b>6300 · FUNDRAISING</b>	
6310 · NAP	23,969.54
6305 · Amazon Smile	188.16
6360 · Gift Card Program	599.53
6380 · Concert	
6385 · Sponsors	8,025.00
6390 · Tickets	7,755.40
	15,780.40
<b>Total 6380 · Concert</b>	<b>15,780.40</b>
<b>Total 6300 · FUNDRAISING</b>	<b>40,537.63</b>

Amethyst House  
**Profit & Loss**  
 July 2022 through June 2023

	Jul '22 - Jun 23
<b>6400 · GRANTS</b>	
6420 · CARES	8,535.96
6430 · EFSP	2,908.00
6440 · Jack Hopkins	18,000.00
6460 · Perry Township	3,818.39
6492 · Sophia Travis	4,960.00
6496 · City of Blgtn	14,000.00
6497 · Bloomington Township	1,000.00
	53,222.35
<b>Total 6400 · GRANTS</b>	53,222.35
<b>6500 · UNITED WAY</b>	16,080.05
<b>6600 · OTHER INCOME</b>	
6605 · Investment Income	16,015.83
6615 · AH Foundation	1,391.00
6625 · Interest Income	88.61
6675 · Reimubersments	
	17,495.44
<b>Total 6600 · OTHER INCOME</b>	17,495.44
<b>Total Income</b>	1,491,199.73
<b>Expense</b>	
<b>7000 · PAYROLL</b>	
7080 · 403 (B) Compnay Match	14,248.78
7025 · Salaries & Wages	805,941.53
7050 · Vacation, Holiday & Sick Pay	82,065.95
	902,256.26
<b>Total 7000 · PAYROLL</b>	902,256.26
<b>7100 · PAYROLL TAXES</b>	
7180 · Payroll Taxes Accrued	4,176.77
7125 · Comp MCARE	12,930.82
7150 · Comp SS	55,290.80
7175 · Comp SUI	2,123.17
	74,521.56
<b>Total 7100 · PAYROLL TAXES</b>	74,521.56
<b>7200 · EMPLOYEE BENEFITS</b>	
7225 · Health Ins.	65,019.24
	65,019.24
<b>Total 7200 · EMPLOYEE BENEFITS</b>	65,019.24
<b>7350 · SUBCONTRACT</b>	
MBE/WBE/IVOSB - SABG	55,139.79
7355 · Counseling for Change	
7356 · CA Funding	55,200.00
	55,200.00
<b>Total 7355 · Counseling for Change</b>	55,200.00
7360 · SPEA Service Corp Contract	1,344.87
7365 · INTECARE FEES	1,172.48
	2,517.35
<b>Total 7350 · SUBCONTRACT</b>	112,857.14

Amethyst House  
**Profit & Loss**  
July 2022 through June 2023

	<u>Jul '22 - Jun 23</u>
<b>7400 · FUNDRAISING EXPENSE</b>	
7495 · Marketing	400.00
7440 · Celebrations	1,072.84
7480 · Concert	10,617.68
	<hr/>
<b>Total 7400 · FUNDRAISING EXPENSE</b>	12,090.52
<b>7500 · SUPPLIES</b>	
7510 · Office	5,433.98
7520 · Postage & Shipping	1,721.04
7530 · Technology	7,858.25
7540 · Printing & Copying	2,148.02
	<hr/>
<b>Total 7500 · SUPPLIES</b>	17,161.29
<b>7575 · DUES &amp; SUBSCRIPTIONS</b>	
Relias Training	5,113.49
7585 · Financial	3,584.40
7576 · EHR System	14,075.99
7580 · Donor Database	2,400.00
7595 · Publications	332.80
	<hr/>
<b>Total 7575 · DUES &amp; SUBSCRIPTIONS</b>	25,506.68
<b>7600 · MEDICAL FEES</b>	
7625 · Supplies	8,054.15
7650 · Clients	28,094.75
7675 · Staff	293.57
	<hr/>
<b>Total 7600 · MEDICAL FEES</b>	36,442.47
<b>7700 · FOOD &amp; BEVERAGE COSTS</b>	
7725 · Clients	47,361.67
7750 · Staff/Board	7,536.86
	<hr/>
<b>Total 7700 · FOOD &amp; BEVERAGE COSTS</b>	54,898.53
<b>7800 · RENT</b>	52,800.00
<b>7900 · TELEPHONE</b>	
7910 · Telephone	13,809.76
7920 · Internet Services	5,193.30
	<hr/>
<b>Total 7900 · TELEPHONE</b>	19,003.06
<b>7950 · UTILITIES</b>	
7960 · Electric	19,864.94
7970 · Gas	3,746.59
7980 · Water	7,599.38
7990 · Cable	2,742.25
	<hr/>
<b>Total 7950 · UTILITIES</b>	33,953.16

Amethyst House  
**Profit & Loss**  
July 2022 through June 2023

	<u>Jul '22 - Jun 23</u>
<b>8000 · INSURANCE</b>	
Malpractice	324.00
<b>8010 · Commercial Package</b>	5,911.00
<b>8020 · Directors &amp; Officers Liability</b>	3,894.01
<b>8030 · Employee Bond</b>	500.00
<b>8040 · Profesional Liability</b>	14,727.98
<b>8050 · Rental Property</b>	2,372.30
<b>8060 · Umbrella</b>	3,239.00
<b>8070 · Workers Comp.</b>	5,201.03
<b>8080 · Vehicle</b>	570.00
<b>8090 · Cyber Policy</b>	1,770.17
	<hr/>
<b>Total 8000 · INSURANCE</b>	38,509.49
<b>8100 · MAINTENANCE &amp; REPAIRS</b>	
<b>8140 · Improvements from Jack Hopkins</b>	18,000.00
<b>8110 · SubContract Labor</b>	5,400.00
<b>8120 · Supplies</b>	17,699.09
<b>8150 · Routine</b>	9,362.92
	<hr/>
<b>Total 8100 · MAINTENANCE &amp; REPAIRS</b>	50,462.01
<b>8200 · PROFESSIONAL FEES</b>	
<b>8220 · CARF Survey</b>	
<b>8240 · CPA</b>	30,475.00
<b>8230 · Certifications</b>	
	<hr/>
<b>Total 8200 · PROFESSIONAL FEES</b>	30,475.00
<b>8400 · INTEREST EXPENSE</b>	
<b>8420 · Other Mortgages</b>	140.93
<b>8410 · LOC</b>	1,244.08
	<hr/>
<b>Total 8400 · INTEREST EXPENSE</b>	1,385.01
<b>8500 · CLIENT EXPENSES</b>	
<b>8580 · Leisure Enhancement</b>	3,694.42
<b>8510 · Supplies</b>	1,283.13
<b>8520 · Household Goods (non-consumbl.)</b>	13,743.16
<b>8540 · Transportation</b>	4,844.46
<b>8560 · Client Fees - Refund</b>	439.03
	<hr/>
<b>Total 8500 · CLIENT EXPENSES</b>	24,004.20
<b>8600 · ADVERTISING</b>	
<b>8640 · Job Advertising</b>	1,451.25
	<hr/>
<b>Total 8600 · ADVERTISING</b>	1,451.25

Amethyst House  
**Profit & Loss**  
July 2022 through June 2023

	<u>Jul '22 - Jun 23</u>
<b>8700 · TRAINING</b>	
Background Checks	622.78
8725 · Staff Conferences	4,793.86
8775 · Materials	392.83
	<hr/>
<b>Total 8700 · TRAINING</b>	5,809.47
<b>8800 · TRAVEL</b>	
8810 · Mileage	6,734.28
8840 · Parking	6.55
8860 · Lodging	584.64
8870 · Meals	479.18
	<hr/>
<b>Total 8800 · TRAVEL</b>	7,804.65
<b>8900 · EQUIPMENT RENTAL/LEASE/PURCH...</b>	
Equipment Lease	7,132.49
Property Taxes	508.42
	<hr/>
<b>Total 8900 · EQUIPMENT RENTAL/LEASE/P...</b>	7,640.91
<b>8950 · DEPRECIATION</b>	22,619.00
<b>9000 · OTHER EXPENSES</b>	
9020 · Gifts	7,731.08
9040 · Service Charges	5,322.11
9024 · Misc.	4,030.25
	<hr/>
<b>Total 9000 · OTHER EXPENSES</b>	17,083.44
<b>Total Expense</b>	<hr/> 1,613,754.34 <hr/>
<b>Net Ordinary Income</b>	<hr/> -122,554.61 <hr/>
<b>Net Income</b>	<hr/> <b>-122,554.61</b> <hr/>

Amethyst House  
**Balance Sheet**  
As of June 30, 2023

	<u>Jun 30, 23</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Checking/Savings</b>	
1000 · ONB 4026850	32,086.97
<b>Savings Accounts</b>	
1025 · Reserve Savings #23312	299.51
1026 · Depreciation Savings # 5446	11,010.05
1040 · Investment Account - #610012015	393,102.70
<b>Total Savings Accounts</b>	<u>404,412.26</u>
<b>Total Checking/Savings</b>	436,499.23
<b>Accounts Receivable</b>	
1080 · Insurance OP Services	16,900.07
1050 · DMHA	71,209.12
1065 · Misc. Grants	2,238.98
1070 · Medicaid Per-Diem	95,326.74
<b>Total Accounts Receivable</b>	<u>185,674.91</u>
<b>Other Current Assets</b>	
<b>1110 · Accounts Receivable</b>	
1114 · Outpatient AR	895.00
1116 · Men's House AR	1,700.00
1119 · Women's House AR	810.57
1112 · Bad Debt Allowance	-500.00
<b>Total 1110 · Accounts Receivable</b>	<u>2,905.57</u>
1345 · Petty Cash -- Admin	300.00
1346 · Petty Cash - Men's	100.00
1347 · Petty Cash - Women's	100.00
1499 · Undeposited Funds	2,655.66
<b>Total Other Current Assets</b>	<u>6,061.23</u>
<b>Total Current Assets</b>	628,235.37
<b>Fixed Assets</b>	
<b>1500 · Property 3/4 Way House</b>	
1538 · Accum Depreciation - 4th St.	-4,338.00
<b>Total 1500 · Property 3/4 Way House</b>	<u>-4,338.00</u>
<b>1400 · Property Women's House</b>	
1410 · Second St. Property	388,772.26
1420 · Accum Depr.- 2nd St.	-182,203.38
<b>Total 1400 · Property Women's House</b>	<u>206,568.88</u>



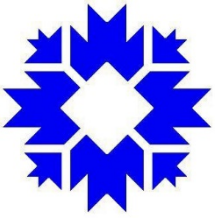
Amethyst House  
**Balance Sheet**  
 As of June 30, 2023

	<u>Jun 30, 23</u>
<b>1415 · Furniture and Equipment</b>	
1416 · Furniture & Equipment	44,384.23
1418 · Office Equipment	2,194.15
1417 · Accumulated depreciation	-38,946.63
	<hr/>
<b>Total 1415 · Furniture and Equipment</b>	7,631.75
<b>1430 · Land</b>	10,000.00
<b>1435 · Property Men's House</b>	
1436 · Rogers St.	473,344.42
1405 · Accum. Depr.- Rogers	-224,325.27
	<hr/>
<b>Total 1435 · Property Men's House</b>	249,019.15
	<hr/>
<b>Total Fixed Assets</b>	468,881.78
	<hr/>
<b>TOTAL ASSETS</b>	<b><u>1,097,117.15</u></b>
	<hr/>
<b>LIABILITIES &amp; EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
2000 · Accounts Payable	24,380.54
	<hr/>
<b>Total Accounts Payable</b>	24,380.54
<b>Credit Cards</b>	
Bank of America (Scott #4975)	222.69
Bank of America WH (Jill #3818)	2,701.62
Bank of America (Jill #4285)	1,036.61
Bank of America (Mark #5092)	550.52
Bank Of America (Gina #4514)	1,592.91
Bank of America (Steve #5890)	152.65
Lowe's	11.04
Staples #5180	967.23
	<hr/>
<b>Total Credit Cards</b>	7,235.27
<b>Other Current Liabilities</b>	
Alumni Account	236.48
3086 · Payroll - Supplemental Insuranc	42.48
3030 · Accrued Vacation	27,895.78
3035 · Payroll - 403 (B)	2,136.04
3040 · Payroll-FEDERAL	4,880.00
3050 · Payroll-INDIANA	2,228.76
3055 · Payroll-MCARE	1,357.60
3060 · Payroll-County Taxes	945.38
3065 · Payroll-SOCSEC	5,808.39
3070 · Payroll-SUI	-131.47
3075 · Payroll-United Way	1,084.00

Amethyst House  
**Balance Sheet**  
As of June 30, 2023

---

	<u>Jun 30, 23</u>
3084 · Payroll - Employee Insurance	67.59
3095 · Salaries & Wages Payable	<u>33,351.78</u>
<b>Total Other Current Liabilities</b>	<u>79,902.81</u>
<b>Total Current Liabilities</b>	<u>111,518.62</u>
<b>Total Liabilities</b>	111,518.62
<b>Equity</b>	
5000 · Open Bal Equity	25,491.17
5005 · Earnings	1,082,661.97
Net Income	<u>-122,554.61</u>
<b>Total Equity</b>	<u>985,598.53</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>1,097,117.15</u></u>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

---

**Lead Agency Name:** Beacon, Inc.

**Address:**

PO Box 451 / 620 S Walnut St Bloomington, IN 47402
---

**Phone:** 812-334-5734

**E-Mail:** amykendall@beaconinc.org

**Website:** www.beaconinc.org

**President of Board of Directors:** Melanie Vehslage

**Name of Executive Director:** Forrest Gilmore

**Phone:** 812-334-5734, ext. 122

**E-Mail:** forrest@beaconinc.org

**Name of Grant Writer:** Amy Kendall

**Phone:** 812-334-5734, ext. 123

**E-Mail:** amykendall@beaconinc.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
25	7	400

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Beacon is a solutions-driven, antipoverty organization, dedicated to aiding and empowering people experiencing extreme poverty, especially hunger and homelessness. Founded in 2000 in response to a growing community concern about the needs of people without homes, Beacon has grown rapidly these past 23 years to become the largest nonprofit housing provider in Monroe County. Beacon provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, life essentials (restrooms, laundry, showers, mail, ID, etc.), and other health and human services to hundreds of adults and children each day and thousands each year.

## PROJECT INFORMATION

---

Name of the project to be funded:

Program Essentials for People in Poverty

Total cost of project: \$31,617.81

Requested amount of Jack Hopkins funding: \$31,617.81

Number of City residents to be served by this project in 2024: 1600

Number of clients to be served by this project in 2024: 2000

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Beacon requests \$31,617.81 for essential equipment to sustain our day center (Shalom Center), hunger relief program (Phil's Kitchen), and our overnight shelter (Friend's Place), in order to provide effective and life-saving services for people experiencing extreme poverty.

- 12 locker sets and 72 locker locks for safe storage for Shalom Center guests: These will allow for safe and accessible storage for our guests. For some of our guests, all of the belongings they own will go into this storage.

- Oven and refrigerator for Phil's Kitchen: This new equipment will replace our current broken equipment as well as permit us to safely store and cook food so that we can continue to provide over 50,000 meals per year to hungry people.

- 12 mattresses for Friend's Place: These will replace old mattresses with holes, tears, and worn down padding. Friend's Place is now the only emergency, year-round shelter for women experiencing homelessness in Monroe County, and these women deserve comfortable accommodations in their moment of crisis.

- 32 chairs for Shalom Center guests: Many of our current chairs have broken, and new chairs will provide a comfortable place for guests to sit and spend time out of the elements.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

620 S Walnut St, Bloomington, IN 47401 (Shalom, Phil's Kitchen)  
and  
919 S Rogers St, Bloomington, IN 47403 (Friend's Place)

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Our annual budget is approximately \$3 million, of which 90% is personnel and client housing costs. Our annual Shalom Center budget is approximately \$750,000, our hunger relief annual budget is about \$180,000, and our Friend's Place annual budget is about \$320,000, most of which is raised from local donors and government grants. The costs for our requested items would be above and beyond our annual budget, but are much-needed and important investments for our programs.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will be able to purchase the items easily online and submit claims for reimbursement soon after.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

We are hoping to fully fund this request through support from Jack Hopkins.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

This project will be a great support to the regular operation of our programs. As mentioned above, Shalom, Phil's Kitchen, and Friend's Place are funded primarily by donations and government grants, and we spend approximately \$1,070,000 on them per year. In-kind contributions of food, clothing, and toiletries allow us to provide more resources to our guests through all three programs. Volunteers are an integral part of our ability to run these programs, and approximately 400 volunteers currently work with Beacon in some capacity.



## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	12 locker sets and 72 locker locks (plus shipping)	<b>\$12,258.95</b>
Priority #2	Oven (plus shipping)	\$9,606.50
Priority #3	Refrigerator (plus shipping)	\$4,836.50
Priority #4	12 Mattresses (plus shipping)	\$2,748.06
Priority #5	32 Chairs (plus shipping)	\$2,167.80
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$31,617.81</b>

# JACK HOPKINS FUNDING CRITERIA

---

## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2020-2024 Consolidated Plan lists one of its core goals as, "Housing/services to the homeless/near-homeless." It describes that goal in part as, "provide funds to support shelter operations" (p. 105). The plan also lists as a goal, "Services for community members in need" and describes that goal as, "Fund organizations providing services lifting individuals out of poverty, including financial assistance, food assistance, shelter, education, and more" (p. 104).

Shalom Center is a day shelter and the central hub for people experiencing homelessness as they seek housing and other resources. Phil's Kitchen, located inside Shalom Center, is the second largest meal provider in the city for its impoverished residents. Friend's Place is the only emergency, year-round shelter for women in Monroe County, and the only local shelter that actively prioritizes Monroe County (mostly Bloomington) residents.

This project will work specifically to support the day-to-day functions of Shalom Center, Phil's Kitchen, and Friend's Place in their work supporting homeless and impoverished guests.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This project is a strong investment in Beacon's ability to deliver services. All items will be utilized for years to come. When we move to our new building in a couple of years, we will take these items with us. They will still be greatly appreciated and continue to be used in our new facility.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Shalom Center provides day shelter and supportive services for thousands of people experiencing extreme poverty every year. It is also the central hub for accessing Beacon's housing programs. Beacon provides more housing for people in poverty than any other nonprofit in Bloomington, which has a clear lasting benefit for those struggling with housing instability and homelessness.

Phil's Kitchen is one of the meal service staples in our city, providing the second highest number of meals to people in poverty in the city.

Friend's Place provides emergency shelter to over 200 people each year. In addition to a safe place to sleep during a time of crisis, Friend's Place provides case work to its guests in order to help them find their own permanent homes.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

The requested items will bolster the quality of our Shalom, Phil's Kitchen, and Friend's Place programs. Hundreds of people will be comfortable due to new chairs and dozens will have safe places to store their belongings in new lockers at Shalom. A new oven and refrigerator will ensure that we can continue to serve over 50,000 meals a year at Phil's Kitchen. New mattresses will help Friend's Place continue to provide over 12,500 nights of shelter for over 200 individuals each year.

## **OTHER COMMENTS** *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Beacon greatly appreciates the past funding from the Jack Hopkins Social Services Committee. As we work toward constructing a new facility, Beacon is determined to continue to provide supportive and life-saving services in our current facilities. Funding to support our current work is as important as ever, even as we look to the future.

In addition, Beacon and its programs are active participants in the Heading Home plan, including serving as the Coordinated Entry Lead for our region as well as a user of the Homeless Management Information System, both essential components of our community's efforts to collaborate among social service providers.

## 2024 Proposed Project Budget

Beacon, Inc.	Program Essentials for People in Poverty		
Total Project Cost	\$31,617.81		
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			\$31,617.81
Other Grants			
Other Income Sources			
<b>TOTAL PROJECT FUNDS</b>	\$31,617.81		\$31,617.81
<b>EXPENSES</b>			
12 locker sets & 72 locker locks (plus shipping)			\$12,258.95
Oven (plus shipping)			\$9,606.50
Refrigerator (plus shipping)			\$4,836.50
12 Mattresses (plus shipping)			\$2,748.06
32 Chairs (plus shipping)			\$2,167.80
<b>TOTAL PROJECT EXPENSES</b>	\$31,617.81		\$31,617.81

## REVIEW AND SUBMIT

ADDRESS SHIPPING PAYMENT **REVIEW AND SUBMIT**

Submit Order

Billing Address	Shipping Address <a href="#">Change</a>	Shipping <a href="#">Change</a>	Payment <a href="#">Change</a>
BEACON INC PO BOX 451 BLOOMINGTON, IN 47402-0451  Uline Account #: 24467037 Order Placed by: REV FORREST GILMORE	BEACON INC 620 S WALNUT ST BLOOMINGTON, IN 47401-4624	Motor Freight - XPO Logistics Fre... Delivery Time: 1 day Ships: Today Delivers on: 4/1/2024 Ships From: KENOSHA, WI <input checked="" type="checkbox"/> Liftgate Service  Add Freight Options <a href="#">?</a> Add Special Instructions	Invoice Me - Pay within 30 days  <a href="#">Add PO#</a>  Add Priority code <a href="#">?</a>


Model #	Description	Unit Cost	Qty	Ext. Cost	Tax <a href="#">?</a>
H-5533AGR	Uline Industrial Lockers - Double Tier, 3 Wide, Assembled, 45" Wide, 18" Deep, Gray	\$864.00 / EA	12	\$10,368.00	<input type="checkbox"/>
H-5678BLU	Plastic Stackable Chair - Blue	\$65.00 / EA	32	\$2,080.00	<input type="checkbox"/>
H-4810	Locker Lock - Lift Handle	\$19.00 / EA	72	\$1,368.00	<input type="checkbox"/>

You qualify for a free item! [Select here.](#)

[Edit Cart](#)  
[Pricing Request \(pdf\)](#) [?](#)

Subtotal = \$13,816.00  
 Tax = \$0.00  
 Shipping/Handling = \$610.75  
**Total = \$14,426.75**

An order confirmation will be sent to FORREST@BEACONINC.ORG [?](#)

- Email me a shipping confirmation.
- Email me a reorder reminder on 4/28/2024 

Text Messages: (812) 322-9591 [Edit](#)  
 Text me order updates from Uline. [?](#)

Submit Order

# NORIX®

Quote

Norix Group, Inc  
One Innovation Drive  
West Chicago IL 60185-2033  
United States

Date 03/29/2024  
Quote # QUO559794  
Expires 04/28/2024  
Project Name Beacon Inc  
Terms Subject to Credit Approval  
Estimated Ship Date

### Bill To

### Ship To

### Contact Name

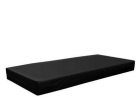
Amy Kendall  
forrest@beaconinc.org  
(812) 334-5734

Beacon Inc.  
620 South Walnut  
Bloomington IN 47401  
United States

### Partner

### Customer Service Rep

Jonh, Macario  
[jmacario@norix.com](mailto:jmacario@norix.com)

Line #	Item	Description	Image	Product Spec Sheet	Qty	Unit Price	Ext. Price
1	MNF6-3 680	Comfort Shield Dorm - Sewn Seam Mattress, MNF6, 36" x 80" x 6"		<a href="#">Product Spec</a>	12	\$211.50	\$2,538.00

<b>Subtotal</b>	\$2,538.00
<b>Tax Total (%)</b>	\$0.00
<b>Shipping Charges</b>	\$210.06
<b>Total</b>	\$2,748.06

### Shipping

Additional Services:

Important: Unless otherwise noted above, Freight shown above is Standard Dock to Dock Delivery via common carrier, using your personnel to unload the merchandise. You will be contacted 24 hours prior to delivery so you may make arrangements to unload the merchandise. If you require different delivery options, please complete and return the attached Delivery Change Form prior to placing your order.

**This Quotation is valid for 30 days and subject to the Standard Terms and Conditions stated in the Norix Group Price List.**

**Thank you for allowing Norix the privilege of quoting your requirements.**

**If you'd like to place an order:**

**For orders over \$10,000, please submit a PO to your Norix Customer Service Representative.**

**For orders under \$10,000, please fill out the bottom portion of this quote and return all pages of the quote to your Norix Customer Service Representative.**

Ship To: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Billing Email: \_\_\_\_\_

Bill To (if different from above): \_\_\_\_\_

Address: \_\_\_\_\_

Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Accepted By: \_\_\_\_\_

P.O. Number: \_\_\_\_\_

Sales Tax Exempt? (please circle) Yes or No

Tax Exempt #: \_\_\_\_\_

Requested Delivery Date: \_\_\_\_\_

[Click Here for Norix Terms and Conditions](#)



	QTY	PRICE	TOTAL
<b>Beverage-Air HBR49HC-1 Horizon Series 52" Bottom Mounted Solid Door Reach-In Refrigerator with LED Lighting</b> Arrives In 3 - 5 business days #185HBR49HC - EACH <b>plus</b> Free Shipping <b>Ships via Common Carrier</b>	1	\$4,809.00	<b>\$4,809.00</b>
<b>Vulcan VC55ED-208/3 Double Deck Full Size Electric Convection Oven - 208V, Field Convertible, 24 kW</b> Arrives In 4 - 6 business days #901VC55EDC - EACH <b>plus</b> Free Shipping <b>Ships via Common Carrier</b>	1	\$9,579.00	<b>\$9,579.00</b>

Subtotal	<b>\$14,388.00</b>
Shipping & Handling <input type="text" value="\$55.00: Common Carrier w/ Liftga"/>	
FREE Call Before Delivery <input type="checkbox"/>	
Using a Freight Forwarder? <input type="checkbox"/>	
<b>Total (USD)</b>	<b>\$14,443.00</b>

**Payment Method**

**Credit Card**

Use Saved Credit Card

By placing your order, you agree to WebstaurantStore's conditions of use.



**✓ Rewards**

- ✓ Earn 3% Back** per \$1 spent at WebstaurantStore!
- ✓ 50% Off** a Plus Membership
- ✓ Earn 5,000 points!** a \$50 value when first purchase is made after account opening. LIMITED TIME OFFER | Apply By 6/30/2

# Beacon, Inc

## Statement of Assets, Liabilities, and Net Assets — Modified Cash Basis

As of December 31, 2023

	TOTAL	
	AS OF DEC 31, 2023	AS OF DEC 31, 2022 (PY)
<b>ASSETS</b>		
Current Assets		
Bank Accounts		
10000 Old National Checking 9643	59,749	28,190
10002 Old National Savings 2314	18,176	18,158
10005 German American Bank 6001	514,180	540,367
10008 PayPal	10,806	6,887
<b>Total Bank Accounts</b>	<b>\$602,911</b>	<b>\$593,602</b>
Accounts Receivable		
11000 Accounts Receivable	61,852	7,050
<b>Total Accounts Receivable</b>	<b>\$61,852</b>	<b>\$7,050</b>
Other Current Assets		
12001 *Undeposited Funds	12,500	0
<b>Total Other Current Assets</b>	<b>\$12,500</b>	<b>\$0</b>
<b>Total Current Assets</b>	<b>\$677,263</b>	<b>\$600,652</b>
Fixed Assets		
18000 Land	140,981	140,981
18100 Land Improvements	21,225	21,225
18200 Buildings	177,879	177,879
18300 Building Improvements	396,804	396,804
18500 Equipment - FP	1,199	1,199
18600 Equipment	113,080	113,080
18700 Furniture and Fixtures	38,387	38,387
18800 Furniture and Fixtures - FP	8,650	8,650
19000 Accumulated Depreciation	(361,985)	(328,250)
<b>Total Fixed Assets</b>	<b>\$536,220</b>	<b>\$569,955</b>
Other Assets		
10004 Endowment	44,804	43,429
<b>Total Other Assets</b>	<b>\$44,804</b>	<b>\$43,429</b>
<b>TOTAL ASSETS</b>	<b>\$1,258,288</b>	<b>\$1,214,037</b>

# Beacon, Inc

## Statement of Assets, Liabilities, and Net Assets — Modified Cash Basis

As of December 31, 2023

	TOTAL	
	AS OF DEC 31, 2023	AS OF DEC 31, 2022 (PY)
<b>LIABILITIES AND EQUITY</b>		
Liabilities		
Current Liabilities		
Accounts Payable		
20001 Payables	0	(126)
<b>Total Accounts Payable</b>	<b>\$0</b>	<b>\$ (126)</b>
Credit Cards		
12102 CENTER CARD	18,263	
<b>Total Credit Cards</b>	<b>\$18,263</b>	<b>\$0</b>
Other Current Liabilities		
26000 Payroll Liabilities	0	0
26100 Flex Med Spending Ded	5,172	(0)
26200 Empl United Way Payable	112	(0)
26501 SIMPLE IRA \$ - ER Match	551	0
26550 SIMPLE IRA % - EE Withholding	1,091	0
<b>Total 26000 Payroll Liabilities</b>	<b>6,925</b>	<b>(0)</b>
<b>Total Other Current Liabilities</b>	<b>\$6,925</b>	<b>\$ (0)</b>
<b>Total Current Liabilities</b>	<b>\$25,189</b>	<b>\$ (126)</b>
<b>Total Liabilities</b>	<b>\$25,189</b>	<b>\$ (126)</b>
Equity		
30000 Opening Balance Equity	1,578	1,578
32000 Unrestricted Net Assets	1,067,432	1,012,429
33000 Restricted Net Assets	154,217	154,217
Net Revenue	9,871	45,939
<b>Total Equity</b>	<b>\$1,233,099</b>	<b>\$1,214,163</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$1,258,288</b>	<b>\$1,214,037</b>

### Note

No assurance has been provided on this financial statement.

Substantially all disclosures required by the modified cash basis of accounting are not included.

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
<b>Revenue</b>		
40000 Donations		3,350
40100 Individual Donations	492,160	439,024
40110 Individual - Events	49,512	31,687
40120 Individual - Merch	1,694	1,642
40130 Stock Donations	22,307	5,106
<b>Total 40100 Individual Donations</b>	<b>565,673</b>	<b>477,459</b>
40200 Faith Community Donations	19,290	37,322
40300 Corporate Donations	23,973	53,767
40310 Corporate - Events	46,050	44,640
<b>Total 40300 Corporate Donations</b>	<b>70,023</b>	<b>98,407</b>
40400 Organization Donations	76,786	129,639
41000 NAP Contributions	23,820	22,250
<b>Total 40000 Donations</b>	<b>755,592</b>	<b>768,427</b>
42000 Government Grants	428,834	361,033
42010 Federal Government Grants	961,416	1,293,505
42020 State/Local Grants	757,977	295,575
<b>Total 42000 Government Grants</b>	<b>2,148,227</b>	<b>1,950,113</b>
42500 Occupancy Fee Income	41,686	30,171
43000 Nongovernment Grants	30,793	25,700
48300 Fundraising Event Income		29
49000 Investment & Interest Income	869	297
49100 Other Types of Income	13,943	6,696
Uncategorized Income		7,051
<b>Total Revenue</b>	<b>\$2,991,109</b>	<b>\$2,788,484</b>
<b>GROSS PROFIT</b>	<b>\$2,991,109</b>	<b>\$2,788,484</b>
<b>Expenditures</b>		
60000 Personnel Expenses	1,759	522
60100 Salaries & Wages	944,979	940,731
60150 Yearly Bonus	14,828	8,971
60400 Payroll Taxes	80,018	86,753
60500 Zane Enrollment Fee	2,808	2,291
60550 Employee Life Insurance	10,099	3,414
60600 FSA Reimbursements	4,924	2,100
60625 TRowe Simple IRA	14,501	12,618
60650 Zane Reimbursements	40,807	31,159
60700 Workers' Compensation	14,938	27,437

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
60800 New Employee Costs	4,035	1,934
60900 Staff Support & Training	13,412	5,059
61100 Mileage & Travel Expense	5,316	5,950
61110 Vehicle Maintenance & Repair	1,084	215
61150 Gas - Van	222	299
<b>Total 61100 Mileage &amp; Travel Expense</b>	<b>6,622</b>	<b>6,464</b>
61200 Contract Services	648	650
61210 Accounting Fees	13,061	9,400
61220 Audit Costs	26,500	13,300
61230 Consulting Services	162,701	870
<b>Total 61200 Contract Services</b>	<b>202,910</b>	<b>24,220</b>
61300 Payroll Accounting Fees	5,892	3,953
<b>Total 60000 Personnel Expenses</b>	<b>1,362,533</b>	<b>1,157,626</b>
62000 Administrative Costs	198	2,231
62100 Office Supplies	2,321	6,251
62200 Postage & Mailing	1,046	2,048
62300 Internet	3,948	5,477
62400 Telephone	9,527	7,355
62500 Technology	16,233	12,055
62600 Memberships & Dues	5,122	1,654
62800 Marketing	12	
<b>Total 62000 Administrative Costs</b>	<b>38,408</b>	<b>37,071</b>
64000 Facility Expenses	3	681
64100 Facilities and Equipment	14,253	3,016
64200 Utilities	89	1,291
64201 Electricity	15,274	18,270
64202 Natural Gas	6,098	8,554
64203 Water	10,556	8,393
<b>Total 64200 Utilities</b>	<b>32,018</b>	<b>36,508</b>
64300 Waste Removal	5,623	5,013
64400 Snow Removal	65	170
64500 Fire Suppression	624	2,010
64600 Pest Control	1,440	2,843
64700 Security	5,492	4,160
64800 Custodial Supplies	11,598	13,607
64900 Kitchen Supplies	16,608	16,656
65000 Maintenance and Repair	10,069	5,105
65200 Property & Liability Insurance	3,389	10,768
65205 Flood Insurance	5,707	5,661
65400 Equipment Lease	5,204	5,291

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
73250 - Auto Insurance	3,708	4,066
<b>Total 64000 Facility Expenses</b>	<b>115,800</b>	<b>115,556</b>
64901 In-Kind Kitchen Supplies	45	
66000 Client Support	25,938	26,082
66100 Client Rents	1,072,029	1,041,790
66151 Last Month Lease Rent	2,832	2,300
66152 First Month Rent	16,166	3,103
66153 Rental Arrears	21,010	3,998
<b>Total 66100 Client Rents</b>	<b>1,112,038</b>	<b>1,051,190</b>
66150 Renters Insurance	1,506	1,892
66200 Client Security Deposits	64,226	40,527
66250 Client Application Fees	7,410	1,926
66251 Moving Cost	7,499	
66300 Client Utilities	54,071	53,269
66301 Client Utility Arrears	17,174	2,581
66302 Client Utility Deposit	7,505	785
<b>Total 66300 Client Utilities</b>	<b>78,750</b>	<b>56,634</b>
66350 Client Programming	259	
66500 Client ID/BMV Expenses	529	1,781
66501 Client Birth Certificate Expenses	1,557	110
<b>Total 66500 Client ID/BMV Expenses</b>	<b>2,086</b>	<b>1,891</b>
66600 HIP Payments	-200	
66700 Pharmacy	152	173
66800 Bus Tickets - Local	9,600	6,440
66900 Bus Tickets Out-of-Town	3,823	4,522
67000 Food	42,270	51,572
67300 Hygiene Pantry	278	8,771
67600 Other Client Needs	5,281	49,805
67700 Lyft Transportation	652	647
<b>Total 66000 Client Support</b>	<b>1,361,568</b>	<b>1,302,072</b>
66901 Reconciliation Discrepancies	77	149
68000 Fundraising Expenses	18,891	35,741
68100 Printing and Copying	16,892	9,709
68200 Postage - Fundraising	5,175	3,007
68250 Donor Relations	1,407	
68300 Fundraising Event Expenses	19,953	19,675
<b>Total 68000 Fundraising Expenses</b>	<b>62,318</b>	<b>68,133</b>
70000 Bank & Credit Card Fees	468	5,070
70001 PayPal Fees	2,642	1,685
72000 Depreciation Expense	33,735	33,735

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
73000 Miscellaneous Expense	3,644	13,294
74000 SIMPLE IRA (Offset Account)		847
<b>Total Expenditures</b>	<b>\$2,981,238</b>	<b>\$2,735,238</b>
NET OPERATING REVENUE	<b>\$9,871</b>	<b>\$53,246</b>
Other Revenue		
75000 Unrealized Gains / Losses		-7,307
<b>Total Other Revenue</b>	<b>\$0</b>	<b>\$ -7,307</b>
NET OTHER REVENUE	<b>\$0</b>	<b>\$ -7,307</b>
NET REVENUE	<b>\$9,871</b>	<b>\$45,939</b>

### Note

No assurance has been provided on this financial statement.

Substantially all disclosures required by the modified cash basis of accounting are not included.



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Big Brothers Big Sisters of South Central Indiana

**Address:**

1802 W 17th St. Suite C Bloomington, IN 47404
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**Phone:** (812) 334-2828

**E-Mail:** BBBS@bigsindiana.org

**Website:** www.bigsindiana.org

**President of Board of Directors:** Sherry Dunbar-Kruzan

**Name of Executive Director:** Jennifer Quick-Cook

**Phone:** (812) 415-5366

**E-Mail:** Jquick-cook@bigsindiana.org

**Name of Grant Writer:** Lauren Fulford

**Phone:** (812) 334-2828

**E-Mail:** bbbs@bigsindiana.org



## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	2	100+

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

At Big Brothers Big Sisters of South Central Indiana our mission is to create and support one-to-one mentoring relationships to ignite the power and promise of youth. Our vision is that all youth will achieve their full potential. By partnering with parents/guardians, volunteers, and others in the community, we are accountable for each child in our program achieving the following: Higher aspirations, greater confidence, and better relationships. avoidance of risky behaviors, and educational success.

## PROJECT INFORMATION

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Name of the project to be funded:

Increase Staffing

Total cost of project: \$25,386.00

Requested amount of Jack Hopkins funding: \$22,350.00

Number of City residents to be served by this project in 2024: 250+

Number of clients to be served by this project in 2024: 250+

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$22,350.00 to elevate our current part-time staff member to full-time at Big Brothers Big Sisters of South Central Indiana (BBBSSCI). Since the pandemic, community needs have surged, prompting us to expand our programs. Notably, we successfully reintroduced Site-Based programming in the Monroe County Community School Corporation in 2024. This expansion has highlighted the necessity to grow our team to sustainably meet community needs, support program participants, and enhance services. Transitioning to a full-time staff member will not only enable us to continue providing vital no-cost opportunities and safe engagement activities but also facilitate deeper community connections.

Moreover, this transition is pivotal for our agency's growth, particularly in terms of programming and fund development. A full-time staff member will bring increased capacity to develop and implement new programs, further enriching our services. Additionally, their expanded role in fund development will bolster our ability to secure resources, paving the way for sustainable growth and greater community impact.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

NA

How do your missions, operations and services complement each other?

NA

What is the existing relationship between agencies?

NA

How will communication and coordination change as a result of the project?

NA

Explain any challenges and steps you plan to take to address those challenges.

NA

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

NA

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

NA

Is the property zoned for your intended use?       Yes       No       N/A

If "no," please explain:

NA

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

NA

# PROJECT COSTS

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

We do not have any additional requests for funding for this specific project outside of this request at the moment.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit claims for reimbursement in a timely manner, starting from mid-June 2024, once our part-time staff member begins working full-time. This timeline aligns with the grant process, allowing us to initiate reimbursement claims immediately upon receiving the funds.

Before the complete drawdown of funds, several steps precede, including:

Documenting expenses: We will maintain detailed records of all expenses related to enhancing our staff member's position to full-time, ensuring transparency and accountability.

Reviewing eligibility: We will review each expense to ensure it falls within the grant's guidelines and is eligible for reimbursement.

Submitting reimbursement claims: We will submit reimbursement claims along with supporting documentation to the funding committee.

Committee review: The funding committee will review our reimbursement claims to verify eligibility and approve the disbursement of funds.

Receiving funds: Upon approval, we will receive the reimbursed funds, allowing us to continue supporting our staff member's transition to full-time and further our mission in the community.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Our agency has taken the necessary steps to transition our part-time staff member to full-time by May 2024. However, to fully complete our project and sustainably support our program's growing demand, we will continue to pursue acquiring additional funding. This funding would enable us to reallocate costs associated with enhancing the staff member to full-time. We project our 2025 budget will allow for the allocation of this position. We will be intentional with our donor management to ensure the cost is maintained from the initial launch mid-year in 2024.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Funding the enhancement of our staff member to full-time will leverage our agency's capacity to attract and recruit new volunteers. With an additional 20 hours per week, we can develop new resources, increase community visibility, and enhance the volunteer experience at BBBSCI. These hours will also support community cultivation, fostering partnerships with local businesses to enrich program opportunities, and expand our Site Based program through other youth serving organizations and spaces. This strategic allocation will free up budget space for programming, enabling funds to be reallocated to other agency priorities, thus maximizing the impact of both financial and volunteer resources.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	PT to FT with Salary Increase from May 1, 2024- December 31, 2024	<b>\$14,350.00</b>
Priority #2	Health Benefits -eligible for full-time staff	<b>\$6,500.00</b>
Priority #3	Professional Development Training	<b>\$1,500.00</b>
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$22,350.00</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

BBSSCI's programs serve all youth aged 6-25, with no financial barriers, ensuring accessibility for low-income and marginalized groups, which are identified as priority populations all of which are recognized in SCAN. Our program data underscores our commitment to serving disadvantaged youth, with a significant percentage on free or reduced lunch (80.13%), receiving additional income assistance (20.53%), having an incarcerated parent (11.26%), or identifying as belonging to a marginalized race/ethnicity (31.13%).

Mentorship isn't just a necessity in our community; it's a crucial preventative measure, significantly lowering the chances of youths dropping out of school, engaging in risky behaviors, or entering the juvenile justice system. Our mentorship programs equip youths with vital transferable skills for success in young adulthood and beyond. Despite the barriers and hardships our youth face, 94% of Littles said they have a level of confidence that they will achieve their goals because of their involvement in our program.

By providing inclusive, barrier-free services, we address critical needs highlighted in community assessments, ensuring equitable access to support and opportunities for all, in line with the goals outlined in the City of Bloomington's Consolidated Plan and other community-wide surveys.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

While our project involves operational expenses, such as transitioning a part-time staff member to full-time, it aligns with the one-time investment criterion. Initial implementation costs associated with this enhancement will diminish post-transition and training. Recurring expenses will be absorbed into our agency's overall budget, supported by increased funding resulting from the staff member's expanded outreach and partnership responsibilities. This approach ensures sustainable funding for ongoing operational needs, minimizing reliance on one-time investments while maximizing the long-term impact of the project.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Investing in this project will create long-lasting benefits for our community. By increasing staffed hours, we will continue to ensure the safety and satisfaction of our program participants and foster more matches between mentors and youth. Additionally, it allows us to deepen relationships with community partners, enhancing fundraising efforts and program experiences for matched youth, their siblings, and those on our waitlist.

Expanding our team through this project accelerates our capacity to create more matches, magnifying BBBSSCI's community impact. By nurturing the potential of our youth today, we shape a brighter tomorrow for our city, cultivating a network of empowered individuals who contribute to the thriving fabric of our community for years to come.

Moreover, the long-term benefits of investing in BBBSSCI extend beyond individual mentorship relationships. As our programs expand and deepen their impact, we contribute to building a stronger, more connected community. Through mentorship, youth develop essential life skills, resilience, and a sense of belonging, which can have far-reaching effects on their future success and well-being. Ultimately, the investment in BBBSSCI not only transforms the lives of individual youth but also helps to build a more vibrant and inclusive community for generations to come.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Outcome indicators for our project include:

Enhanced number of new partnerships established within the community.

Increase in the number of lives impacted through our programs.

Achievement of the agency's annual budget goals.

Reduce number of youths on our waitlist.

Shortened length of enrollment from start to finish.

Increase number of program events facilitated by BBBSSCI.

Improved caseload balance amongst program staff.

These indicators will help measure the immediate impact and success of enhancing our part-time staff member to full-time, providing tangible metrics to assess the effectiveness of our project within the funding period.



## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

We appreciate the chance to present our funding request through the Jack Hopkins Social Services Grant Program. Below are additional points to support our need for project funding and the long-term impacts it will have on our community:

Creating new and meaningful matches: Every match, regardless of the program they are in, is monitored by a professional staff member to ensure safety and satisfaction for all parties involved: the parent/guardian, the Little, and the Big.

Reduction of youth involved in the juvenile justice (JJ) system: At BBBSSCI 98.88% of the current youth matched in our programs have avoided the JJ system since enrolling in our programs.

Improved attendance at school: Our data shows that at a national level, youth enrolled in our programs skipped half as many days of school as did their peers.

As one of the youth serving organizations within our community, we want to ensure we highlight the components of the work we do and how it sets us apart. First, we have an unwavering commitment to inclusivity and accessibility. Unlike many programs, our participants do not face financial barriers to access our services. We prioritize inclusivity by providing our services at no cost so that affordability is never a barrier to participation, opening our programs to all who can benefit.

Furthermore, our dedication to safety and satisfaction is unparalleled. We utilize measurable data collected through monthly touchpoints with our program participants to continuously assess the effectiveness of our programs, ensuring that they meet the highest standards of quality and provide a positive experience for all involved.

Our flexibility and variety of program offerings also distinguish us. We understand that one size does not fit all, so we offer multiple program options to accommodate various schedules and needs. We strive to provide options that cater to the diverse needs of our participants.

Most importantly, our focus extends beyond the present moment. While we aim to provide immediate support and guidance, we are also deeply invested in the long-term success of our participants. Through mentorship, we equip youth with essential life skills that will serve them well into the future, empowering them to thrive and succeed in all aspects of life. By prioritizing accessibility, safety, flexibility, and long-term success, we stand out as a beacon of excellence in our community. Thank you for considering our request through this funding opportunity.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit claims for reimbursement in a timely manner, starting from mid-June 2024, once our part-time staff member begins working full-time. This timeline aligns with the grant process, allowing us to initiate reimbursement claims immediately upon receiving the funds.

Before the complete drawdown of funds, several steps precede, including:

Documenting expenses: We will maintain detailed records of all expenses related to enhancing our staff member's position to full-time, ensuring transparency and accountability.

Reviewing eligibility: We will review each expense to ensure it falls within the grant's guidelines and is eligible for reimbursement.

Submitting reimbursement claims: We will submit reimbursement claims along with supporting documentation to the funding committee.

Committee review: The funding committee will review our reimbursement claims to verify eligibility and approve the disbursement of funds.

Receiving funds: Upon approval, we will receive the reimbursed funds, allowing us to continue supporting our staff member's transition to full-time and further our mission in the community.

**Describe the outcome indicators to be used to measure the success of your project.**

Outcome indicators for our project include:

Enhanced number of new partnerships established within the community.

Increase in the number of lives impacted through our programs.

Achievement of the agency's annual budget goals.

Reduce number of youths on our waitlist.

Shortened length of enrollment from start to finish.

Increase number of program events facilitated by BBSSCI.

Improved caseload balance amongst program staff.

These indicators will help measure the immediate impact and success of enhancing our part-time staff member to full-time, providing tangible metrics to assess the effectiveness of our project within the funding period.

### 2024 Proposed Project Budget

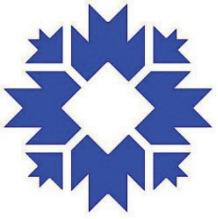
Big Brothers Big Sisters of South Central Indiana		Increase Staffing	
Total Project Cost		\$25,386.00	
	Totals	Other Income Sources	JHSS Grant
<b>Funds</b>			
<b>JHSS GRANT</b>			\$22,350.00
Other Income sources		\$3,036.00	
<b>TOTAL PROJECT FUNDS</b>	<b>\$25,386.00</b>	<b>\$3,036.00</b>	<b>\$22,350.00</b>
<b>EXPENSES</b>			
Part-time to Full-time with Salary Increase (20 hours per week to 40 hours weekly) from May 1, 2024- December 31, 2024- 35 weeks			\$14,350.00
Health Benefits - eligible for full-time staff			\$6,500.00
Professional Development Training			\$1,500.00
Holiday and Paid Time Off Package (offered to full-time employees only) 12 Holidays and 10 days off		\$3,036.00	
<b>TOTAL PROJECT EXPENSES</b>	<b>\$25,386.00</b>	<b>\$3,036.00</b>	<b>\$22,350.00</b>

# BIG BROTHERS BIG SISTERS OF SC IN

## Statement of Activity

January - December 2023

	TOTAL
Revenue	
4000 Government Grants	500.00
4100 Private Grants	306,050.85
4200 Individual Contributions	68,155.29
4300 Indirect Contributions	
4310 United Way of Monroe County	18,085.20
4330 Foundation & Misc Grants	16,991.78
<b>Total 4300 Indirect Contributions</b>	<b>35,076.98</b>
4800 Fund Raising	84,758.62
4900 Investment income	8,274.36
4995 Miscellaneous Income	2,544.34
<b>Total Revenue</b>	<b>\$505,360.44</b>
GROSS PROFIT	<b>\$505,360.44</b>
Expenditures	
6000 Agency Expense	28,953.16
6100 Board & Staff Expenses	7,888.75
6200 Equipment	4,351.97
6300 Insurance	10,792.41
6400 Occupancy	45,539.42
6500 Payroll	266,580.00
6600 Professional Fees	31,020.82
6700 Program Expense	16,651.67
6800 Volunteer Expense	1,789.49
9055 Interest Expense	4,456.77
Uncategorized Expense	27.60
<b>Total Expenditures</b>	<b>\$418,052.06</b>
NET OPERATING REVENUE	<b>\$87,308.38</b>
NET REVENUE	<b>\$87,308.38</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** BLOOMINGTON COOPERATIVE LIVING

**Address:**

404 W KIRKWOOD AVE MIDDLE EARTH HOUSE BLOOMINGTON, IN 47404
---

**Phone:** 415-697-6533

**E-Mail:** finance@bloomingtoncooperative.org and lkutsenkow@gmail.com

**Website:** https://www.bloomingtoncooperative.org/

**President of Board of Directors:** Sarah Conley

**Name of Executive Director:** None

**Phone:** None

**E-Mail:** None

**Name of Grant Writer:** LESLIE KUTSENKOW

**Phone:** 415-697-6533

**E-Mail:** finance@bloomingtoncooperative.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	1	60

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The mission of BCL is: "Bloomington Cooperative Living creates and maintains affordable, communal housing in Bloomington, Indiana that is democratically controlled by residents." As a registered 501(c)(3) nonprofit organization, we believe housing is a human right. We work together to create, maintain and expand affordable housing in Bloomington, Indiana without a profit motive.

As part of the BCL mission and commitment to affordable housing, 75% our members meet national, state, and local low-income standards. All members at Middle Earth (404 W. Kirkwood Ave.) and The Trellis (921 W. 9th St.) fall below the 80% threshold for the HUD Bloomington metro area.

# PROJECT INFORMATION

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Name of the project to be funded:

Middle Earth Repairs

Total cost of project: \$4,110.30

Requested amount of Jack Hopkins funding: \$4,110.30

Number of City residents to be served by this project in 2024: 20

Number of clients to be served by this project in 2024: 20

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

BCL is requesting \$4,110.30 for immediate repairs needed at our largest house in the cooperative (20 residents). This repair will help us achieve electrical safety in the home to standards at 404 W. Kirkwood Ave (Middle Earth).

Repairing and replacing the 200 amp main electrical panel is the most urgent and necessary item. We are also requesting security lights and camera for our bike shed that houses over 25 bicycles. We have witnessed in the past week alone multiple nonresidents approaching the bike shed and have already had one theft in 2024. It is now a security risk for our members property and safety of the home without cameras and outdoor lighting. Finally, we would like to install an additional outlet in 2 bedrooms that currently only have one functioning outlet. This ensures that the rooms are electrically accessible for use.

BCL has committed to funding multiple repairs at Middle Earth (insulation, HVAC, installation of new floor and bath upstairs that leaks into kitchen, etc.) and at our 2 other owned properties (flooring, insulation, misc. repairs). We expect this request to be much less than all other total repairs yet critical to fund.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***



# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

404 W Kirkwood Ave, Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

n/a

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

No permits needed.

# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

None specifically for this project. Partial funding will have a significant impact on residents. Most importantly, partial funding could impact the cost of rent to increase. As such, BCL would have to make the decision to raise rents (which would have detrimental effects) or to secure more 3rd party funding which impacts the stability and financial viability of BCL overall.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to complete all of the repairs immediately due to the urgency of the funding request. Since this is one contractor there would be only 1 reimbursement needed.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Without the funding we will be delaying the repairs until enough money is saved in operating reserves. We have already determined rent increases for next lease year starting in August 2024. Any amount not funded by Jack Hopkins will be paid with operating reserves and the balance will be distributed in rent increases in the 2025 lease year. The timing needed for above also would delay repair timing, which is critical for this grant request.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

BCL Members are facilitating and coordinating the project and there will not be any staff funding required. Board President Sarah Conley would be the appointed individual with fiduciary responsibility.

BCL Members provide in-kind labor for physical improvements to BCL properties on a regular basis as part of their membership agreement. For example, the BCL properties at 921 W. 9th Street and 410 W. Kirkwood Ave. (not benefiting from the funds applied for in this application) utilized hundreds of hours of in-kind contributions from members over the course of its construction from construction to administration and coordination of the project.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Change and repair 200 amp main electrical box	2,295.50
Priority #2	Install security door bells at front and bike shed door. Move exterior light and add LED motion light at bike shed	1,112.00
Priority #3	Add outlets into 2 upstairs bedrooms that have only 1 outlet per room	702.80
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		4,110.30

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The SCAN identifies 70% of renters in Monroe county as cost burdened by their housing, spending more than 30% of their income (p. 77). This suggests a distinct lack of quality affordable housing in the county. This problem is pronounced in the lowest income brackets with 38% of households with income less than \$15,001 and 20% of households with income between \$15,001 and \$25,000 had a major problem paying their rent or mortgage.

As part of the BCL mission and commitment to affordable housing, 75% of our members meet national, state, and local low-income standards. All members at Middle Earth (404 W. Kirkwood Ave.), The Trellis (921 W. 9th St.), and Mercury (410 W. Kirkwood Ave) fall below the 80% threshold for the HUD Bloomington metro area.

BCL does not rent to students only. In fact, students range from 30-50% of each household. BCL has done research on rent to charge the members of each house, including 404 W. Kirkwood Ave, to cater outside the student population. Our cooperative housing model helps to save money and resources for all members.

This project will ensure we are able to continue to provide quality housing to low income residents.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This immediately impacts our operating reserves and maintaining a house that is over 100 years old in downtown Bloomington. By receiving this grant, we have the opportunity to not raise rent in the next lease cycle for the residents. BCL is paying for multiple other repairs (not in this submission) out of reserves on insulation, water leakage from second story into kitchen, and other misc items that are far greater than this submission. This grant will help subsidize a portion of the total repair costs for electrical work only. We estimate the other repairs to be 2-3x this grant request.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Bloomington Cooperative Living (BCL) creates and maintains affordable, communal housing in the Bloomington area. The Trellis, Middle Earth, and Mercury serve community members at or below 80% of the Bloomington, Indiana HUD metro Area Median income (AMI).

In addition to the typical housing challenges faced by people of low and moderate income, cover 50% of current residents in the house at 404 W. Kirkwood Ave. are LGBTQ+. Finding safe housing and an accepting community is often a challenge faced by LGBTQ+ people seeking housing. BCL provides acceptance, safety, and a healthy community for LGBTQ+ people.

On the BCL website, we are an "organization committed to creating a living environment that is safe and nourishing for everyone. We strive to implement social safety practices within the cooperative. We do not tolerate racism, sexism, homophobia, transphobia, ableism or classism. We do our best to make BCL a space free from any type of discrimination, harassment, or oppression". This is important for our mission as a nonprofit that intends to remain an active part of the community with our member diversity and inclusion strategy.

We are committed to being an affordable housing solution in downtown Bloomington.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Since BCL is a member based Nonprofit organization, the key outcome indicators for success of the project are:

1. Ability to maintain full membership.
2. Maintain safety and HAND standards for the building.
3. Maintain safe entrances and exits for members and their property.
4. Ensure no annual rent increases beyond the standard 2-3% cost of living increases.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

As described on the city's Affordable Housing web page and in its 2020 housing study, Bloomington has one of the highest costs of living in Indiana, affecting low-income renters the most. As we are all aware, the cost burden of housing keeps rising in our community. As an organization primarily serving people at or under 80% of the Bloomington, IN HUD Annual Median Income, we try to use all reasonable avenues to maintain an affordable cost of living for our members.

Founded in 2007, BCL democratically manages five houses throughout Bloomington, three of which it owns (404 W. Kirkwood Ave, 410 W. Kirkwood Ave, and 921 W. 9th Ave), and two of which it leases (630 Atwater Ave. and 418 S. Woodlawn Ave.). Our latest addition was to convert a previous commercial shopping center into a 10-bedroom residential space at 410 W. Kirkwood as a cost-effective way of creating new housing. We currently have 69 adults and 4 children living in five BCL residences. We also have a part time staffer to help with accounting and other various tasks for BCL.

As an organization, BCL strives to balance fulfilling its mission (providing affordable, democratically controlled housing) at present while maintaining long-term financial health, which will enable it to continue fulfilling its mission in the future and reach even more of the community. Two phrases often used to describe the cooperative housing movement are "intentional community" and "living consciously." These phrases can take on various meaning, but they create a foundation of our members being thoughtful of how we interact with each other and the world around us. Doing so, by definition, involves paying attention to our impact on the environment and our interactions with our surrounding community. In fact, the seventh principle of the cooperative movement states that "cooperatives work for the sustainable development of their communities through policies approved by their members." Cooperatives are more affordable due to members sharing the costs of maintenance, repairs, and utilities, which can result in lower monthly housing expenses. We have recently installed solar panels and a compost system this year.

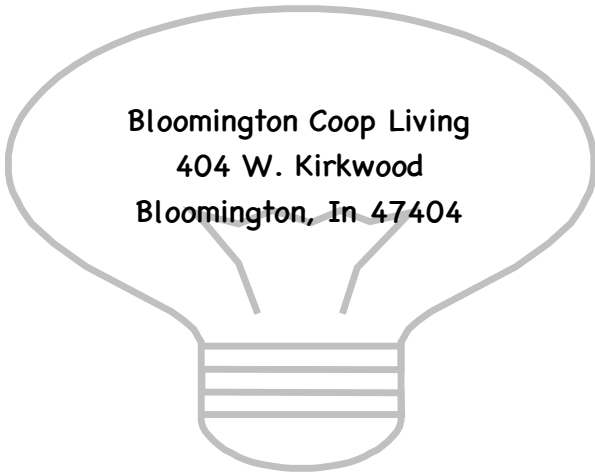
Part of our mission is to make a positive impact on the community around us. Our efforts to expand and maintain diversity in our houses, and maintaining quality affordable housing for low-income residents are just a few ways we do this. Overall, BCL provides an alternative housing model that prioritizes affordability, community, and shared responsibility, making it an attractive option for many individuals and families. Cooperatives foster a sense of community with shared common spaces and responsibilities, leading to closer relationships and social support networks.

Our board of directors as of April 1, 2024, are:

President: Sarah Conley  
Vice-President: Evelyn Smith  
Treasurer: Gage Miller  
Secretary: Leslie Kutsenkow  
House Representative "Which House": Will Holdhusen  
House Representative "Middle Earth": Lain Conway  
House Representative "Goodlawn": Isaac Rutrough  
House Representative "The Trellis": Neko Juers  
Community Board Members: Hugh Farrell & Annie Shattuck  
At Large Board Members: Jasper Wirtschafter & Bradi Heaberlin  
Part time Staffer: Bridget Crawford

## 2024 Middle Earth Proposed Project Budget

Bloomington Cooperative Living		Middle Earth Repairs	
Total Project Cost		4,110.30	
	Totals	Other Income Sources	JHSS Grant
<b>JHSS Grant</b>			4,110.30
Other Grants		0.00	
Other Income Sources		0.00	
<b>Total Project Funds</b>			<b>4,110.30</b>
<b>Expenses</b>			
Electrical Repairs			4,110.30
<b>Total Project Expenses</b>			<b>4,110.30</b>



# ESTIMATE

Estimate Date  
24-Mar-24

Job Location  
Residence

Qty	Description	Unit Price	Amount
1	Electrical to change/Repair 200 amp Main panel  MATERIALS AND LABOR FOR ABOVE		\$2,295.50
1	Move exterior light & add led motion light (Contractor furnish)  MATERIALS AND LABOR FOR ABOVE		\$262.00
1	Add outlets in upstairs bedrooms  MATERIALS AND LABOR FOR ABOVE		\$702.80
1	Add & furnish ring video door bells at front & side door (by bikes)  MATERIALS AND LABOR FOR ABOVE		\$850.00
<b>ALL INVOICES ARE PAYABLE UPON RECEIPT!!</b>		<b>SUB-TOTAL</b>	<b>\$4,110.30</b>
		<b>PERMIT FEE</b>	<b>\$0.00</b>

Questions concerning this invoice?  
Call Tammy Haynes:  
4812-339-2225 0812-340-0730

Make checks payable to:  
**TS Electric**  
6395 E. Kerr Creek Rd.  
Bloomington, In 47408

**\$4,110.30**  
**PAY THIS**  
**AMOUNT**

**THANK YOU FOR YOUR BUSINESS!!**



# Bloomington Cooperative Living

## Statement of Activity

January - December 2023

	TOTAL
<b>Revenue</b>	
Billable Expenditure Revenue	17,770.00
Interest Earned	292.54
<b>Member Contributions</b>	<b>268,605.63</b>
Food Contributions	
GL Food (in)	35.95
ME Food (in)	667.00
The Trellis Food (in)	1,934.00
WH Food (in)	652.00
<b>Total Food Contributions</b>	<b>3,288.95</b>
NASCO Dues	81.00
Rent Contributions	35,312.00
GL Rent (in)	2,084.00
ME Rent (in)	24,914.54
Trellis Income (In)	
Trellis CoL Fees (In)	14,052.00
Trellis Other Income (In)	28,459.00
<b>Total Trellis Income (In)</b>	<b>42,511.00</b>
WH Rent (in)	96,021.80
<b>Total Rent Contributions</b>	<b>200,843.34</b>
Utilities Contributions	
WH Utilities (in)	10.00
<b>Total Utilities Contributions</b>	<b>10.00</b>
<b>Total Member Contributions</b>	<b>472,828.92</b>
Parking Income	1,750.00
Sales	0.00
Uncategorized Income	6,851.65
<b>Total Revenue</b>	<b>\$499,493.11</b>
<b>GROSS PROFIT</b>	<b>\$499,493.11</b>
<b>Expenditures</b>	
Bank Charges & Fees	195.05
CDFI Loan Repayment	2,060.00
Contractors	25,812.84
Development	1,560.00
Food	
410 Food (out)	54.69
410 Groceries	5,460.57
<b>Total 410 Food (out)</b>	<b>5,515.26</b>
Bulk	
410 Bulk (out)	766.81
<b>Total Bulk</b>	<b>766.81</b>

	TOTAL
GL Food (out)	380.00
GL Bulk	9,305.76
GL Groceries	8,736.57
<b>Total GL Food (out)</b>	<b>18,422.33</b>
Trellis Consumables (Out)	269.85
Trellis Bulk (Out)	358.19
Trellis Groceries Meat (Out)	104.92
Trellis Groceries Non-meat (Out)	18,305.03
Trellis Household Supplies (Out)	2,597.07
Trellis Piazza (Out)	13,705.60
<b>Total Trellis Consumables (Out)</b>	<b>35,340.66</b>
WH Food (out)	1,126.29
WH Bulk	4,671.37
WH Groceries	10,243.80
<b>Total WH Food (out)</b>	<b>16,041.46</b>
<b>Total Food</b>	<b>76,086.52</b>
Legal & Professional Services	8,540.20
ME Food (out)	
ME Bulk	8,136.85
ME Groceries	16,903.37
<b>Total ME Food (out)</b>	<b>25,040.22</b>
ME Utilities (out)	3,232.40
Miscellaneous House Expenses	128.27
410 Misc (out)	8,639.53
GL Misc (out)	215.80
ME Misc (out)	51,078.67
Trellis Other (Out)	1,207.02
WH Misc (out)	3,960.61
<b>Total Miscellaneous House Expenses</b>	<b>65,229.90</b>
Mortgage Interest	36,953.63
NASCO Dues	-120.00
Other Business Expenses	205.00
Reimbursable Expenses	559.75
Rent and Housing Expenses	63,610.00
Insurance	4,062.25
Interest Paid (Middle Earth Mortgage)	27,156.59
Project 410 LEAF (out)	
Project 410 LEAF Interest Paid	6,758.30
<b>Total Project 410 LEAF (out)</b>	<b>6,758.30</b>
Rent	51,400.00
Trellis Expenses (Out)	608.85
Trellis Mortgages	
Com Foundation (Out)	6,315.74
<b>Total Trellis Mortgages</b>	<b>6,315.74</b>
Trellis Security Deposit Return (Out)	1,080.00
<b>Total Trellis Expenses (Out)</b>	<b>8,004.59</b>
<b>Total Rent and Housing Expenses</b>	<b>160,991.73</b>

	TOTAL
Repairs & Maintenance	
410 Renovations & Maintenance	251,739.50
ME Repairs & Maintenance	14,160.74
ME Grant	42,624.18
<b>Total ME Repairs &amp; Maintenance</b>	<b>56,784.92</b>
Trellis Maintenance (Out)	5,181.42
Trellis Renovation Work (Out)	5,690.01
WH Repairs & Maintenance	308.68
<b>Total Repairs &amp; Maintenance</b>	<b>319,704.53</b>
Staffer Wages	4,770.00
Taxes & Licenses	573.75
Uncategorized Expense	50,903.34
Utilities	
410 Utilities (out)	5,908.97
GL Utilities (out)	8,212.34
ME Utilities (out)	17,275.23
Trellis Utilities (Out)	13,878.62
WH Utilities (out)	11,130.26
<b>Total Utilities</b>	<b>56,405.42</b>
<b>Total Expenditures</b>	<b>\$838,704.28</b>
NET OPERATING REVENUE	<b>\$ -339,211.17</b>
Other Revenue	
LEAF/CDFI Loan Disbursement	447,817.00
<b>Total Other Revenue</b>	<b>\$447,817.00</b>
Other Expenditures	
Other Miscellaneous Expense	13.20
<b>Total Other Expenditures</b>	<b>\$13.20</b>
NET OTHER REVENUE	<b>\$447,803.80</b>
NET REVENUE	<b>\$108,592.63</b>

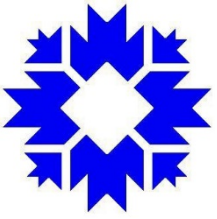
# Bloomington Cooperative Living

## Statement of Financial Position

As of December 31, 2023

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Goodlawn (0076)	8,798.75
Goodlawn Savings (0001)	5.43
GRANTS IN RESERVES (0003)	17,781.78
MEMBER DEPOSITS (0001)	28,772.70
Middle Earth (0076)	40,098.25
Middle Earth Savings (0001)	2,133.35
OPERATING EXPENSES (0077)	20,964.49
OPERATING RESERVES (0002)	0.00
Project 410 Checkings	5,477.18
Project 410 Savings	2,870.33
REPLACEMENT RESERVES (0006)	41,861.63
Trellis Banking (In)	-2,793.00
Trellis Consumables (0076)	12,283.94
Trellis Reserves (0077) (In)	-4,848.76
Trellis Savings (In)	5.00
<b>Total Trellis Banking (In)</b>	<b>4,647.18</b>
Which House (0076)	10,171.41
Which House Savings (0001)	92.37
<b>Total Bank Accounts</b>	<b>\$183,674.85</b>
Accounts Receivable	
Accounts Receivable (A/R)	16,495.53
<b>Total Accounts Receivable</b>	<b>\$16,495.53</b>
Other Current Assets	
Inventory Asset	0.27
Uncategorized Asset	-540.00
Undeposited Funds	173.00
<b>Total Other Current Assets</b>	<b>\$ -366.73</b>
<b>Total Current Assets</b>	<b>\$199,803.65</b>

	TOTAL
Fixed Assets	
Buildings	
410/Mercury	
Construction	0.00
Settlement Costs	5,341.50
<b>Total 410/Mercury</b>	<b>5,341.50</b>
Middle Earth Building	
Accumulated Amortization	-3,276.00
Accumulated Depreciation	-87,597.00
Land	50,000.00
Leasehold Improvements	50,797.00
Original cost	486,164.00
Settlement Costs	18,625.00
<b>Total Middle Earth Building</b>	<b>514,713.00</b>
The Trellis Building	
Construction	216,113.20
Original Cost	201,615.50
Settlement Costs	6,441.01
<b>Total The Trellis Building</b>	<b>424,169.71</b>
<b>Total Buildings</b>	<b>944,224.21</b>
<b>Total Fixed Assets</b>	<b>\$944,224.21</b>
<b>TOTAL ASSETS</b>	<b>\$1,144,027.86</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
Credit Cards	
Middle Earth Grant CREDIT LINE (0501) - 4	-371.22
<b>Total Credit Cards</b>	<b>\$ -371.22</b>
<b>Total Current Liabilities</b>	<b>\$ -371.22</b>
Long-Term Liabilities	
401/Mercury Mortgage	412,000.00
Middle Earth IUCU Mortgage	435,698.65
Security Deposits	40,508.38
The Trellis Mortgage	251,903.77
<b>Total Long-Term Liabilities</b>	<b>\$1,140,110.80</b>
<b>Total Liabilities</b>	<b>\$1,139,739.58</b>
Equity	
Opening Balance Equity	-436,930.06
Retained Earnings	379,017.07
Net Revenue	62,201.27
<b>Total Equity</b>	<b>\$4,288.28</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$1,144,027.86</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** Bloomington Meals on Wheels

**Address:**

2620 N. Walnut St., Suite 925 Bloomington, IN 47404
--

**Phone:** 812-822-2499

**E-Mail:** info@bloomingtonmealsonwheels.org

**Website:** bloomingtonmealsonwheels.org

**President of Board of Directors:** Carol Weiss-Kennedy

**Name of Executive Director:** Carrie McHaley

**Phone:** 812-822-2499

**E-Mail:** carrie@bloomingtonmealsonwheels.org

**Name of Grant Writer:** Carrie McHaley

**Phone:** 812-822-2499

**E-Mail:** carrie@bloomingtonmealsonwheels.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	2	300

### **MISSION STATEMENT** (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The mission of Bloomington Meals on Wheels is to provide nutritional meals to homebound persons who are unable, through medical or physical disability, to purchase and prepare nourishing meals. The service is provided to the ill, disabled or elderly, regardless of income and without distinction as to race, color, creed, national origin or sex.

## PROJECT INFORMATION

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Name of the project to be funded:

Medically-tailored meal kits

Total cost of project: \$15,500

Requested amount of Jack Hopkins funding: \$5,500

Number of City residents to be served by this project in 2024: 100

Number of clients to be served by this project in 2024: 100

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$5,500 for a pilot program to create and distribute 100 medically-tailored food pantry kits.

Our mobile food pantry program, Groceries to Go, delivers supplemental food at no charge to Bloomington residents who are unable to access another food pantry or Community Kitchen due to health issues or lack of transportation. Food pantry donations are often convenience foods and are high in sodium and highly processed. Individuals with chronic medical conditions such as heart disease or diabetes often struggle to find appropriate foods available at food pantries. Foods appropriate for special diets are often more costly at the grocery store as well.

We would like to pilot a program to make medically-tailored food pantry kits. We would start with a low-sodium kit and a diabetic friendly kit. Each kit would include a one week meal plan, recipes, and all ingredients needed to make the meals in the kit. A registered dietitian will create the meal plans and recipes and specify the ingredient list.



# COLLABORATIVE PROJECTS

---

Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

N/A

How do your missions, operations and services complement each other?

N/A

What is the existing relationship between agencies?

N/A

How will communication and coordination change as a result of the project?

N/A

Explain any challenges and steps you plan to take to address those challenges.

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

N/A

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

We anticipate requesting \$10,000 for this project through a Meals on Wheels of America opportunity late this summer to continue the pilot phase of this project. This grant would allow us to expand the pilot program and provide an additional 200 medically-tailored meal kits.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will submit claims for reimbursement monthly, August through November. A complete drawdown when we have purchased the needed supplies for the program, likely in November.

August \$750  
September \$3,000  
October \$1,000  
November \$750

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

We can complete a portion of the pilot with just the Jack Hopkins Social Services Funding. The application for the additional funding is due to open in July, with notification in September. The project will not have to wait for that application to begin. The additional funds will be used to continue the pilot started with this grant.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Bloomington Meals on Wheels leverages the support of over 300 volunteers each month to deliver meals, pack grocery bags, coordinate other volunteers, assist with financial oversight, fundraise, and market the organization. Meals on Wheels continues to leverage collaborative community partnerships with CallNet, Meadowood Retirement Community, Area 10 Agency on Aging, Hoosier Hills Food Bank, and IU Health Bloomington Hospital.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Dietician to develop meal plans, recipes, ingredient list	\$750
Priority #2	Food	\$4,500
Priority #3	Delivery for food	\$250
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to the City of Bloomington, Housing and Neighborhood Development Department's 2020-2024 Consolidated Plan, the Non-Homeless Special Needs Assessment, 8.7% of Bloomington's population is 65 or older and another 7% under 65 years old are disabled. Ninety-five percent of participants in Bloomington Meals on Wheels' Groceries to Go program are in these categories. The HAND Consolidated Plan Objectives include financial assistance to organizations that serve those specified populations. Per the 2012 SCAN 2010 Household Survey, over 50% of respondents with a household income of \$15,001 or less report that having enough money for food was a major or minor problem. Eighty-five percent of participants served by Groceries to Go report a household income under \$15,001.

This project will improve access to healthy foods need to maintain a diet that manages chronic conditions, improving health and reducing emergency healthcare due to nutrition related to chronic health issues.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This project is a pilot to expand offerings of Groceries to Go to address not only food insecurity, but chronic health issues as well. Our goal is that this pilot will allow us to gather metrics to apply to other funders to support a full-scale food pharmacy to provide medically-tailored meal kits to food insecure individuals to manage chronic conditions.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

As a pilot project, the hope is that the program will be successful and grow to serve additional people with other funding resources. When Bloomington residents have access to nutritious foods, especially those tailored to their individual dietary needs, they are better able to manage chronic conditions, such as diabetes, and reduce strain on healthcare resources. For people with chronic health conditions, appropriate diets can significantly reduce visits to the emergency department and hospitalizations due to complications preventable with proper diet. This frees up needed healthcare resources within our community.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

At the end of the grant period:

- We will have created a one-week meal plan, recipes and ingredient lists for two different restricted diets.
- We will have distributed a minimum of 100 medically-tailored meal kits to Bloomington residents on a restricted diet who cannot access other food pantries or Community Kitchen due to health issues or lack of transportation.
- At least 60% of recipients will report that the meal kits helped them manage their chronic conditions. (Assumes that some recipients won't return or complete the survey).

We will survey meal kit recipients each week when they place an order about if they feel the meal kits are helping manage their chronic conditions.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Regarding funding priorities, the amount for food could be reduced, however, that reduction would result in fewer meal kits being distributed proportionally.

**Jack Hopkins Social Services Funding Request Budget 2024**

**Bloomington Meals on Wheels**

**Medically-Tailored Meal Kits**

**Total Project Cost** **\$15,550**

<b>Income</b>	<b>Totals</b>	<b>Other Income Sources</b>	<b>JHHS Grant</b>
Jack Hopkins Social Service Funding requested			\$5,500
Meals on Wheels of America - anticipated application		10,000	
<b>Total income</b>	<b>\$15,500</b>	<b>\$10,000</b>	<b>\$15,500</b>

**Expenses**

Contract dietician to develop meal box approp	\$750	\$1,000	\$750
Food	\$4,500	\$8,500	\$4,500
Food delivery	\$250	\$500	\$250
<b>Total Project Expenses</b>	<b>\$10,500</b>	<b>\$10,000</b>	<b>\$5,500</b>



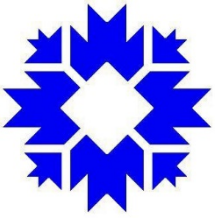
## Meals on Wheels Twelve Months of Running Our Operations

January 1, 2023- December 31 , 2023

		Twelve Months ended 12/31/23	12 month 2023 Budget Amounts	% of budget
<b>Operations-Serving meals</b>				
Waiver client payments		\$91,322	78,620	116%
Self-pay payments		51,546	56,450	91%
<b>Total payments received for meals</b>		142,868	135,070	106%
Waiver clients		(46,759)	(44,360)	105%
Self-pay clients		(42,780)	(49,500)	86%
Low-income clients		(53,199)	(65,970)	81%
<b>Total payments to hospital/Meadowood for meals</b>		(142,738)	(159,830)	89%
<b>Net cost to provide meals</b>	<b>A</b>	<b>130</b>	<b>(24,760)</b>	
<b>Operating expenses:</b>				
Payroll salaries		51,830	50,850	102%
Executive director's bonus		5,000	5,000	100%
Payroll tax		4,210	7,500	56%
Total salary costs		61,040	63,350	96%
Business insurance		2,199	3,560	62%
Business travel		395	500	79%
Dues and subscriptions		495	600	83%
Facilities costs		10,988	21,500	51%
Fundraising costs		973	800	122%
Groceries to Go Costs		14,633	2,000	
Management fees		780	800	98%
Miscellaneous		1,003	-	
MOW Solutions		900	900	100%
Office expenses		374	300	125%
Postage & delivery		756	750	101%
Printing & reproduction		632	1,000	63%
Professional and legal		1,543	1,800	86%
Program supplies		550	1,000	55%
Shared maintenance fee-GTG		-	2,500	0%
Technology		-	250	
Volunteers		7,846	5,000	157%
<b>Total Operating Expenses</b>	<b>B</b>	105,107	106,610	
<b>Net Cost of Operations (A-B)</b>		\$ (104,977.00)	(131,370)	
<b>Other Income:</b>				
Individual donors		32,864		
Donations from organizations		1,100		
Grants-direct deposit to MOW		47,652		
NAP credits		22,232		
<b>Total contributions from donors</b>		103,848		
<b>Grants received deposited to BHF</b>		21,246		
<b>Total other income</b>		125,094		
<b>Investment activity:</b>				
Realized gains (losses) on investments		30,734		
Interest & dividend income		13,754		
Unrealized gains (losses)		54,047		
		98,535		

Meals On Wheels  
Where We Stand Financially As Of December 31, 2023

	Dec. 31, 2023	Dec. 31, 2022
Current assets:		
Regions bank account	\$29,916	\$31,970
Investments held by the foundation:		
Beginning of the year	611,659	
Contributions & change in investments	172,643	
Funds drawn for cash needs & management fees	<u>(53,780)</u>	
Foundation balance as of 12/31/2023	<u>730,522</u>	
Total assets as of 12/31/2023	<u>760,438</u>	
Estimate of net worth as of 12/31/22	643,629	
Change in value of assets	<u>116,809</u>	
Estimate of MOW net worth as of 12/31/2023	<u>760,438</u>	



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Bloomington St. Vincent de Paul serving Monroe CO

**Address:** 1413 East 17th Street,  
Bloomington, IN 47408

**Phone:** (812) 961-1510

**E-Mail:** info@bloomingtonsvdp.org

**Website:** https://www.svdpbloomington.org

**President of Board of Directors:** We have a slate of officers, but no Board

**Name of Executive Director:** Scott Alber (President)

**Phone:** (812) 322-1093

**E-Mail:** salber@bloomingtonsvdp.org

**Name of Grant Writer:** Jo Gilbertson and Mary Jean Regoli

**Phone:** (812) 219-5566; (812) 322- 5345

**E-Mail:** jo\_gilbertson\_503@comcast.net; mjregoli@outlook.com

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	72

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The Society of St. Vincent de Paul is an all-volunteer, non-profit, 501(c)(3) organization serving those in need in Bloomington and Monroe County, Indiana without regard to religion, gender, sexual orientation, race, or ethnicity. Our local organization began in 1992, primarily providing donated furniture to families. Now volunteers meet clients person-to-person, assisting with resource materials, rent and utility bills, rent deposits, furniture and appliances, medical co-pays, and emergency vehicle assistance. We provide safety-net services to families and individuals in our community who are suffering, forgotten, or deprived—the working poor, the homeless, those who have been incarcerated, and all people living on the margins of society. We seek a solution to help those in need to pay rent to secure housing. The help given is based on the need of the client and the resources available. We require no faith-based test; we are open to all.

# PROJECT INFORMATION

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Name of the project to be funded:

St. Vincent de Paul Housing Stability Program

Total cost of project: \$91,000

Requested amount of Jack Hopkins funding: \$30,000

Number of City residents to be served by this project in 2024: 120 households (288 individuals)

Number of clients to be served by this project in 2024: 487 households (1170 individuals)

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We request \$30,000 to assist the vulnerable population in the city of Bloomington to pay rent. Our maximum financial assistance to clients is \$150 every six months. Clients report their rent has been raised \$50-\$100 per month, and landlords of Section 8 homes are increasing their deposits by an even greater amount. We continue to witness need that surpasses our standard financial assistance to enable people to access housing and remain in their homes. With this grant funding we will pay up to \$250 to help families stabilize their housing situation.

One client, age 54, has many disabilities. He was approved for Section 8, had only \$930 SSI, and needed help with the present month's rent. We were able to help him pay, on time, all of his rent due so he would not encounter late fees. He had been homeless, living in an abandoned house north of town, and gotten sick drinking distilled rain water. He explained to our Home Visitor how he had to parcel out his money to get this apartment, pay his bills, and purchase food. We provided additional guidance to help him learn how to manage his bills and get assistance for food.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

N/A

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

We had a grant for \$20,000 from the Good Shepherd Fund at the Catholic Foundation to be used for both rent and utility assistance. We also receive funds from individual donors. The amount of these funds varies from year to year. Of the \$74,121 that we disbursed to clients for rent assistance in FY2023, 49% came from individual donors and 51% came from grants.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will submit claims periodically as checks clear the bank (necessary for documentation) and will draw down by December 2, 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We have a very close working arrangement with the various Bloomington Townships. They also contact us if we can help beyond what they can provide by the rules they must follow. We also have a wonderful relationship with MCUM, Salvation Army, South Central Community Action Program (SCCAP), Beacon (Shalom), CenterPoint, First United Church, Sherwood Oaks and so many other churches. Our organization maximizes funds for clients by utilizing 72 recurring volunteers who work efficiently to determine client needs, verify their information, and provide the best assistance possible with the resources available.



## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Assist 120 households with rent	\$30,000
Priority #2	With partial funding, we would help fewer families.	
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		\$30,000

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to the 2020 Service Community Assessment of Needs (SCAN), 21.6% of people live in poverty in Monroe County, and this percentage has been increasing. The City of Bloomington Five-Year Consolidated Plan (2020-2024) states that the most significant housing issue identified was cost burden, defined as spending between 30-50% of household income on housing costs, and severe cost-burden, defined as households spending more than 50% of their income on housing costs. According to CHAS data, 28.9% of Bloomington households are severely cost burdened, while an additional 14.7% experience cost burden.

Cost burden and severe cost burden disproportionately affect households with incomes below 80% of the Median Family Income (MFI). For example, 72.6% of households earning 30% of MFI or less are severely cost burdened. Elderly, small family, and single person households face similar rates of housing problems at incomes of 50% MFI and below.

According to the Consolidated Plan, there are 13,065 households earning 0-50% HUD-adjusted Median Family Income (HAMFI) and 5,735 housing units affordable to households at those income levels. More than twice as many need housing than there are affordable units for those at this low-income level.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This will be a bridge to assist people who have substandard housing or who face eviction. They need rent to help keep them in their home. Less than 10% of rentals in Bloomington are under \$1,000 a month. According to the Harvard Joint Center for Housing Studies, renters in the Bloomington Metropolitan Statistical Area struggle more with high-cost burdens than renters in other areas in Indiana. In Bloomington, 33% of households are cost-burdened, and 20% are severely cost-burdened, spending more than 50% of income on housing.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The U.S. Interagency Council on Homelessness found that “Living in a stable, adequate home that is affordable to the household yields a multitude of opportunities and stronger outcomes for children, youth, and adults. ...Without stable housing, young people are more vulnerable to mental health problems, developmental delays, and poor cognitive outcomes. Ultimately, the lack of stable housing has long-lasting effects that can impact health, education, and employment throughout people’s lives and in future generations.” (The Importance of Housing Affordability and Stability for Preventing and Ending Homelessness, May 2019)

Our project addresses a pressing need to secure stable housing by providing assistance with rent payments. Last fiscal year, St. Vincent de Paul granted 992 requests with \$219,820 total financial aid given. 34% of financial aid was for rent (375 families). The need exceeded what we could provide. We work diligently to acquire external grants to augment these funds including a \$20,000 grant from The Catholic Foundation for rent and utilities received late November, 2023 that was dispersed in three months. This \$30,000 grant would enable us to increase our aid to \$250 for city residents, providing a greater impact for families facing challenges in securing stable housing.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

The effectiveness of this program will be measured by the number of clients who were able to secure housing or to stay in their homes due to the \$250 added monies the grant would supply. We will see if the additional monetary support helped to keep them sheltered and had a positive impact on their household economic conditions.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

People in need contact us directly, or the Township Trustees, Monroe County United Ministries, 211, the Salvation Army, and other agencies, as well as previous clients recommend St. Vincent de Paul to our clients as a place to receive assistance for rent, as well as other bills. The potential client leaves a voice to text message with name and phone number. The Phone Volunteer returns the call and asks for date of birth, address, and the need from the client. We will screen potential clients to determine their need for rent assistance, city of residence, income, and other information to evaluate the appropriate use of these grant funds. If the client resides within Bloomington, a Home Visitor is assigned to call and schedule an interview with that individual.

It is during the interview that our St. Vincent de Paul member gathers information about the family and their circumstances:

- The number in the household
- Who provides income to the family (including SS, SSI, SSDI, pensions, jobs, child support paid out or coming in)
- The amount of income from each family member
- Is the client currently receiving assistance through Public Housing or Section 8
- Has the client been to their Township Trustee, and after that, Monroe County United Ministries, Salvation Army, church calls, and the results of such contacts
- If they have not contacted this list of places to gain help, we ask that they do so.
- Their expenses for utilities, rent, and other bills.

They seek to hear their story to determine how best SVdP can help, both financially and with furniture that has been donated, as well as to share the SVdP government and local resource booklet (updated every 6 months). Volunteers strive to show respect, kindness, compassion, and understanding while offering suggestions as to alternative means of responding to their challenges.

We have a referral and screening process in place that ensures equitable distribution of funds: The Home Visitor submits a Client Report electronically to the Treasurer and President. This report includes interview responses and the Home Visitor determination of the level of assistance we will provide after information is verified.

BLOOMINGTON ST. VINCENT de PAUL SERVING MONROE COUNTY  
2024 Jack Hopkins Social Services Grant Opportunity

FY2024 Proposed Project Budget for Client Rent

Total Project Cost: \$91,000

	<u>Total Project</u>	<u>Internal</u>	<u>Other Grants</u>	<u>JHSS</u>
<b>REVENUE</b>				
JHSS Grant		\$ 0	\$ 0	\$30,000
Other Grants		0	15,000	0
Internal Sources		<u>46,000</u>	<u>0</u>	<u>0</u>
<b>TOTAL FUNDS</b>	<b>\$91,000</b>	<b>\$46,000</b>	<b>\$15,000</b>	<b>\$30,000</b>
<b>EXPENSES</b>				
Rent Assistance		<u>\$46,000</u>	<u>\$15,000</u>	<u>\$30,000</u>
<b>TOTAL COSTS</b>	<b>\$91,000</b>	<b>\$46,000</b>	<b>\$15,000</b>	<b>\$30,000</b>

Hopkins 2024 grant application\_fin rpt&project budget

March 11, 2024

BLOOMINGTON ST VINCENT de PAUL SOCIETY SERVING MONROE COUNTY  
Report on Fiscal Year-End 2023

YEAR-END REPORT

Overall, the Conference ended the year with a small deficit of \$2,619 on total revenues of \$260 thousand across all funds. The General Operating Fund recorded a deficit of \$1,235, while the cash/restricted funds were reduced by \$1,384.

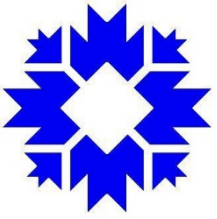
	9/30/2022		Disburse-	Net	9/30/2023
	<u>Balances</u>	<u>Receipts</u>	<u>ments</u>	<u>Change</u>	<u>Balances</u>
General Operating Fund	\$ 102,832	\$ 131,393	\$ 132,628	\$ (1,235)	\$ 101,597
Cash/Restricted Accounts					
Appliance Center	\$ 3,427	\$ 770	\$ 1,889	\$ (1,119)	\$ 2,308
Bob Muldoon Fund	7,530	4,915	4,509	406	7,936
Catholic Foundation	-	40,000	40,000	-	-
Furniture Special Projects	4,914	18,885	22,121	(3,236)	1,678
Grant: Bloomington Township	-	5,000	3,672	1,328	1,328
Grant: 100+ Women Who Care	-	12,050	9,523	2,527	2,527
Jack Hopkins Grants	(17,138)	33,281	20,647	12,634	(4,504)
Rent Deposits	5,297	-	5,297	(5,297)	-
Sophia Travis Grant	-	-	3,907	(3,907)	(3,907)
Vehicle Assistance Program	<u>6,416</u>	<u>13,508</u>	<u>18,228</u>	<u>(4,721)</u>	<u>1,695</u>
Subtotal	\$ 10,445	\$ 128,409	\$ 129,793	\$ (1,384)	\$ 9,060
TOTAL ALL FUNDS	\$ 113,277	259,802	\$ 262,421	\$ (2,619)	\$ 110,657

CLIENT ASSISTANCE FUNDED DURING FY 2023

The General Operating Fund provided \$92,429 in client financial assistance during the year, augmented greatly by \$127,390 in grant and designated funds. Checks written numbered 992. As is typical for our client needs, utilities and rent, at \$139,678, dwarfed other categories, accounting for nearly two-thirds of the total. The aid for vehicle repairs was strong, and furniture and appliances recorded significant amounts; these levels of aid will likely not be repeated unless we receive new grant or other funds designated for these uses. The numbers of checks written represent a proxy of clients served except for auto and furniture/appliances, where large checks provided aid for many individual clients.

<u>Category Group</u>	<u>General</u>	<u>Grants &amp;</u>	<u>Total</u>	<u># Checks</u>
	<u>Operating</u>	<u>Designated</u>		
Rent	\$ 36,010	\$ 38,111	\$ 74,121	375
Utilities	39,168	26,389	65,557	351
Vehicle Assistance	1,852	28,537	30,389	110
Furniture & Appliances	1	25,747	25,748	39
Rent Deposits	6,303	8,077	14,380	72
All Other	<u>9,095</u>	<u>530</u>	<u>9,625</u>	<u>45</u>
	\$ 92,429	\$ 127,390	\$ 219,820	992

Hopkins 2024 grant application\_fin rpt&project budget



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Boys & Girls Clubs of Bloomington

**Address:**

803 N. Monroe St. P.O. Box 1716 Bloomington, IN 47404
---

**Phone:** 812-332-5311

**E-Mail:** labshier@bgcbloomington.org

**Website:** bgcbloomington.org

**President of Board of Directors:** Lori Todd

**Name of Executive Director:** Jeff Baldwin

**Phone:** 812-332-5311

**E-Mail:** jbaldwin@bgcbloomington.org

**Name of Grant Writer:** Leslie Abshier

**Phone:** 812-332-5311

**E-Mail:** labshier@bgcbloomington.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
28	47	148

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The mission of the Boys & Girls Clubs of Bloomington (BGCB) is to empower all young people, especially those who need us most, to reach their full potential as caring, productive and responsible citizens. Club programs build character and strengthen life skills while providing hope and opportunity through accessible programming made possible by low membership dues (\$20 per year), transportation from school to Clubs, and programs such as cooking, tutoring, drama, etc. BGGCB meets the needs of the community by providing well-rounded after school programs that support the goals of the city and needs of its families.



## PROJECT INFORMATION

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Name of the project to be funded:

Safe Entrances and Exits

Total cost of project: \$25,575

Requested amount of Jack Hopkins funding: \$20,000

Number of City residents to be served by this project in 2024: 1162

Number of clients to be served by this project in 2024: 1960

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$20,000 to replace all doors in our Lincoln Street and Ferguson Crestmont Clubs to increase safety.

After an external safety inspection from BGCA and a threat assessment from APEX Security it has been determined that the entrances and exits into our spaces are one of our largest risk areas in our buildings. The doors themselves are often failing to shut completely, they get stuck, the locking cores are loose, along with other issues. This is causing safety issues as well as frequent expensive repairs. We do not currently have auto-locking doors at our Clubs. Staff protocols require staff to unlock and lock doors as they enter and exit spaces, however this allows for human error. When doors are left unlocked, it can allow for kids to enter spaces that are unsupervised. This is one of our largest safety risk areas - kids that are not directly monitored by an adult at all times. Auto-locking doors will eliminate human error and keep our kids safe. We will also have auto-locking external doors that will require guests to be buzzed in. These new doors and locks installed are \$852.50 each and we need 30 doors.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

Same as agency address

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

We expect \$5,000 in-kind or discounted from the vendor - this request has been made, but is pending at this time.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will use one vendor for the entire project so we will just need to secure the commitment of funds to move forward with the purchase. This would likely be completed in less than 90 days from the time the vendor is hired.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

It is dependent on other funding. If you receive Jack Hopkins funds, the vendor will discount or contribute some of the remainder (up to \$5,000) in-kind. If we do not receive this funding, we will not move forward with the project at this time although it will remain a high priority to fund. If we receive partial funding, we would do the doors that are higher priority, such as the exterior doors and the doors that are at higher risk for having unsupervised kids in spaces if they are left unlocked.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

The vendor is waiting to see if we can secure other funding before committing to an in-kind or discount amount. This commitment from Jack Hopkins will help us secure that funding.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Ferguson Crestmont Exterior Doors	\$5,115
Priority #2	Lincoln Street Exterior Doors	\$3,410
Priority #3	Ferguson Crestmont Interior Doors	\$7,230
Priority #4	Lincoln Street Interior Doors	\$4,245
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$20,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The Ferguson Crestmont unit is located in the Bloomington Housing Authority and directly addresses one of the city's primary needs according to the 2020 Consolidated Plan for the City of Bloomington: access to public services for youth (2020-24 Consolidated Plan p. 84-85). Serving families in a public housing neighborhood, the Ferguson Crestmont Club provides a safe environment and strong mentoring programs to a demographic at high risk for dropping out of school, teen pregnancy, crime, abuse, and neglect. Both the Crestmont and Lincoln Clubs serve as community centers for youth after-school, on Saturdays, during the summer, and during school breaks. Between the Clubs, more than 55% of families are extremely low income. Research confirms that quality mentoring relationships have powerful positive effects on young people last their entire lives. According to the Afterschool Alliance After 3PM Report, youth with consistent adult mentors in an afterschool program have higher academic achievement, improved social competence, higher aspirations, and improved behavior. Our programs provide a positive, safe, and supportive environment to our community's most vulnerable, yet most promising citizens. Improving the safety of our buildings and restricting access starts with the auto-locking doors we are requesting support for through this Jack Hopkins grant.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This is a one-time safety investment that will not have to be made again until far in the future. These doors should last a long time and will be higher quality and therefore less likely to fail. The vendor is willing to give us a warranty as part of their in-kind commitment so that future repairs will have little to no cost.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

We are committed to continually improving. The doors for the new buildings were chosen in 2016, and since that time, new safety requirements now exist. We have done collaborative work with Boys & Girls Clubs across the state and with the national organization, looking at research from leading youth development organizations across the country to determine the best way to keep the youth in our care safe. The peer-to-peer and external safety assessments were all put in place over this time to keep kids as safe as possible. The feeling of safety and the ability we have to keep kids safe is essential to the long-term well-being of the kids we serve. America After 3PM reports that afterschool programs have kept kids safe, inspired them to learn, and offered parents peace of mind that their children are constructively engaged in the hours between the end of the school day and when parents return from work. Afterschool programs are a lifeline for working families. 78% of parents with a child in an after-school program agrees that the program helps them keep their job or work more hours. This has significant and long-lasting benefits for the whole community.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

We expect to see incident reports of doors left unlocked go to zero. We currently see a few a month.

We expect to see our annual safety inspection show that we have mitigated the risk that was associated with our entrances and exits.

We expect to spend no money on doors repairs in the future - to be tracked as zero repair dollars spent during the period of our funding agreement. We are making weekly to bi-weekly repairs on doors currently.

We expect to see the # of children who report feeling safe at the Club staying above 95%.

## **OTHER COMMENTS** *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Each door is \$852.50 if we do all the doors as once. We can do a few doors at a time if complete funding is not provided. However, the cost will increase per door due to labor costs increasing. Each time a crew comes out there is a cost associated with that, so the cheapest way to get this done is to do it all at once.

Thank you for considering partnership with Boys & Girls Clubs of Bloomington as we stay vigilant and relentless to protect our community's youth.



## 2024 Jack Hopkins Project Budget

<b>Boys &amp; Girls Clubs of Bloomington</b>		<b>Safe Entrances and Exits</b>	
Total Project Cost		\$25,525	
	Totals	Other Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			\$20,000
City Glass		\$5,000	
General Donations		\$525	
<b>TOTAL PROJECT FUNDS FROM ALL SOURCES</b>	<b>\$25,525</b>	<b>\$5,525</b>	<b>\$20,000</b>
<b>EXPENSES</b>			
Ferguson Crestmont Exterior Doors		\$0	\$5,115
Lincoln Street Exterior Doors		\$0	\$3,410
Ferguson Crestmont Interior Doors		\$3,000	\$7,230
Lincoln Street Interior Doors		\$2,575	\$4,245
<b>TOTAL PROJECT EXPENSES</b>	<b>\$25,525</b>	<b>\$5,525</b>	<b>\$20,000</b>

**CITY GLASS OF BLOOMINGTON INC.  
719 WEST 17TH STREET  
BLOOMINGTON, IN 47404**

PAGE NO: 1

**PHONE: (812) 336-0138**

<b>CUSTOMER NO:</b> 1056	<b>JOB NO:</b> 000	<b>PURCHASE ORDER:</b>	<b>REFERENCE:</b> JAMES KENNEDY	<b>TERMS:</b> NET 30 DAYS	<b>CLERK:</b> JZ	<b>DATE / TIME:</b> 3/1/24 9:17
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**SOLD TO:**  
BOYS & GIRLS CLUBS OF  
BLOOMINGTON  
311 SOUTH LINCOLN STREET  
BLOOMINGTON IN 47401  
812-332-5311

**SHIP TO:**  
803 N MONROE ST  
  
BLOOMINGTON IN

EXPIRATION DATE: 3/2/24

TERMINAL: 559

SALESPERSON: JZ JASON ZEHR  
TAX: EX EXEMPT SALES

**ESTIMATE: 431241**

SHIPPED	ORDERED	UM	SKU	DESCRIPTION	SUGG	UNITS	PRICE /PER	EXTENSION	
	1	EA	8700	LCN 4040 CLOSER		1	615.00 /EA	615.00 N	
	1	EA	8700	LCN DROP PLATE		1	67.50 /EA	67.50 N	
	2	EA	LC	LABOR		2	85.00 /EA	170.00 N	
				QUOTE TO REPLACE SARGENT CLOSER W/ LCN CLOSER ON ALUMINUM DOOR					
								TAXABLE	0.00
								NON-TAXABLE	852.50
								SUB-TOTAL	852.50
								TAX AMOUNT	0.00
								<b>TOTAL AMOUNT</b>	<b>852.50</b>

X \_\_\_\_\_  
Received By

# Boys & Girls Clubs of Bloomington

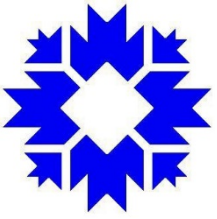
## Statement of Activity

January - December 2023

	TOTAL
<b>Revenue</b>	
40000 Auxiliary Funding	75,348.84
40010 Special Events	
40011 Boys to Men	217,841.26
40012 Club Heroes Golf Outing	61,642.50
40013 Spring Fling	6,994.26
40014 Hoops Hysteria	3,633.00
40015 Lemonade Day	51,531.96
40016 Smart Girls, Strong Women	157,639.15
40017 Other Fundraising Events/Income	15,075.65
<b>Total 40010 Special Events</b>	<b>514,357.78</b>
40020 Contributions	
40021 Bequests/Memorials	8,040.96
40022 Major Gift Initiative	382,219.66
40023 Individual	236,565.86
40024 Civic Groups	30,655.54
40025 Corporate	113,717.94
40026 Alumni Club	2,905.83
40027 Big Hearts	87,782.41
40028 Our Kids	220,204.57
<b>Total 40020 Contributions</b>	<b>1,082,092.77</b>
40040 Fees	
40042 Club Camp Fees	
40042-10 Club Camp Fees-Ellettsville	85,326.74
40042-20 Club Camp Fees-Crestmont	30,569.51
40042-30 Club Camp Fees-Lincoln	137,045.00
40042-40 Club Camp Fees - Camp Rock	165,457.50
<b>Total 40042 Club Camp Fees</b>	<b>418,398.75</b>
40060 Facility Rental Fees	0.00
40060-20 Facility Rental-Crestmont	18,322.50
40060-30 Facility Rental-Lincoln	26,580.00
40060-40 Facility Rental-Camp Rock	750.00
40060-50 Facility Rental-Kenworthy	40,008.00
<b>Total 40060 Facility Rental Fees</b>	<b>85,660.50</b>
<b>Total 40040 Fees</b>	<b>504,059.25</b>
40070 Grants	
40071 Government	822,376.32
40072 Non-Government	499,321.06
<b>Total 40070 Grants</b>	<b>1,321,697.38</b>
40080 Interest Income	336.30
40090 Reimbursement Income	8,385.71
Billable Expenditure Revenue	0.00

	TOTAL
Non Profit Income	270.00
Unapplied Cash Payment Income	-309.00
<b>Total Revenue</b>	<b>\$3,506,239.03</b>
<b>GROSS PROFIT</b>	<b>\$3,506,239.03</b>
Expenditures	
60000 Fundraising Special Events	
60001 Boys to Men Expenses	6,319.51
60002 Club Heroes Golf Outing Expenses	5,011.76
60003 Spring Fling Expenses	951.11
60004 Hoop Hysteria Expenses	1,503.68
60005 Lemonade Day Expenses	25,458.46
60006 Smart Girl, Strong Women Expenses	6,566.76
60007 Other Fundraising Expenses	2,140.61
<b>Total 60000 Fundraising Special Events</b>	<b>47,951.89</b>
60009 Cultivation/Stewardship	21,746.26
60010 Marketing, Advertising & Dues	24,553.81
60020 Club Gear	3,532.89
60030 Facility Maintenance	182,498.56
60035 Member Food	9,497.54
60040 Equipment & Hardware	26,898.56
60045 Transportation	33,679.36
60060 Programs	91,914.51
60075 Software, Licenses & Fees	119,641.22
60080 Staff Food, Training & Recognition	24,911.62
60090 Supplies Copier Printing Mail	22,319.94
60095 Utilities	112,945.01
60100 Vehicle	5,272.44
60110 Professional & Legal Fees	90,269.59
60115 Property Taxes	4,026.42
60120 Member Engagement	2,258.68
60125 Board of Directors Expense	18,147.85
60130 Bank & Credit Card Processing Fees & Interest	26,627.33
60140 Background Checks	4,893.06
60150 Dues	17,223.43
60160 Insurance	64,635.93
60163 Commercial Package (deleted)	-269.00
<b>Total 60160 Insurance</b>	<b>64,366.93</b>
60165 Payroll Taxes	-8,779.28
60166 Social Security	123,498.51
60167 Medicare	28,882.48
<b>Total 60165 Payroll Taxes</b>	<b>143,601.71</b>
60170 Staffing Expenses	
60173 Work Study, AmeriCorps, & VISTA	73,576.75
60175 Payroll Deduction	-215.49
<b>Total 60170 Staffing Expenses</b>	<b>73,361.26</b>
60177 Wages	2,049,332.27
60180 Benefits	151,013.79

	TOTAL
Unapplied Cash Bill Payment Expenditure	0.00
<b>Total Expenditures</b>	<b>\$3,372,485.93</b>
<b>NET OPERATING REVENUE</b>	<b>\$133,753.10</b>
Other Revenue	
40029-00 Big Futures Capital Campaign	72,200.00
40029-10 Restricted - Lilly Endowment Grant	400,000.00
40030-10 Restricted - One Love Scholarship	9,356.00
40030-20 Restricted - Club Teen Account	3,802.48
40030-30 Restricted - Fire Relief	1,335.00
40030-40 Restricted - Camp Rock Renovation	250,000.00
Other Income	
Income in Endowment Fund	176,487.58
<b>Total Other Income</b>	<b>176,487.58</b>
<b>Total Other Revenue</b>	<b>\$913,181.06</b>
Other Expenditures	
60200 Capital Campaign Expenses	29.00
60201 Ellettsville Renovations - Lilly Grant	128,672.97
60202 Owen County Expansion - Lilly Grant	37,971.59
60204 Fire Relief	1,336.95
60205 Cate Gift (CR Updates)	2,143.99
60206 Creek / Boundary Waters	4,402.00
<b>Total Other Expenditures</b>	<b>\$174,556.50</b>
<b>NET OTHER REVENUE</b>	<b>\$738,624.56</b>
<b>NET REVENUE</b>	<b>\$872,377.66</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

---

**Lead Agency Name:** Cancer Support Community South Central Indiana

**Address:**

**Phone:** (812) 233-3286

**E-Mail:** info@cancersupportscin.org

**Website:** cancersupportscin.org

**President of Board of Directors:** Tavonna Harris Askew

**Name of Executive Director:** Dr. Terry Whitt Bailey

**Phone:** (317) 257-1505

**E-Mail:** terry@cancersupportindy.org

**Name of Grant Writer:** Stephanie Shelton

**Phone:** (574) 606-7687

**E-Mail:** stephanie@cancersupportscin.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	6	50

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Cancer Support Community South Central Indiana (CSCSCI) uplifts and strengthens people impacted by cancer by providing support, fostering compassionate communities, and breaking down barriers to care.

CSCSCI is located at 1719 W 3rd St., Bloomington, IN. CSCSCI provides free supports and resources to cancer patients and survivors as well as their family, friends, caregivers, and loved ones. All programs are offered FREE of charge to anyone impacted by cancer. Programs focus on mental, physical, social and emotional health. Examples of free programming include: counseling and support groups, nutrition and exercise classes, cancer education, social connections, and financial assistance.

## PROJECT INFORMATION

---

Name of the project to be funded:

Financial Assistance for Cancer Patients

Total cost of project: \$32,430

Requested amount of Jack Hopkins funding: \$9,000

Number of City residents to be served by this project in 2024: 60

Number of clients to be served by this project in 2024: 305

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$9,000 for financial assistance and supplies for cancer patients to meet essential needs for their household during cancer treatments.

CSC provides free resources, programs and support from the time of diagnosis throughout survivorship to both cancer patients and their loved ones. The funds requested will be used to provide financial assistance with food and transportation, and free resources to cancer patients in active treatment cycles.

Food and transportation are essential for cancer patients to maintain health and attend cancer treatments. CSC provides grocery and gas gift cards to patients in active treatment cycles who meet income requirements of 300% of federal poverty level. CSC works with oncology social workers and nurse navigators to identify and refer patients with financial need.

Examples of free resources the funds will be used to purchase include: wig kits, chemo kits, hats, scarves, skin care items, queasy drops, SAVI bras for breast cancer radiation patients, and other comforting items. Items are distributed in local chemo and radiation centers and CSC's office.



# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

1719 W 3rd St  
Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**

Yes

No

N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Confirmed: United Way South Central Indiana \$7,400; Boston Scientific Foundation \$6,000; Sophia Travis \$4,930  
Pending: Tri Kappa \$3,600; Brown County Community Foundation \$1,500

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

CSC will purchase items and submit one claim for reimbursement by December 2024. CSC will purchase items for cancer patients, and begin to distribute them upon receiving funding award announcement. CSC will collect data as items are distributed, and report with the claim reimbursement.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Project is not dependent on other anticipated funding. As funds are awarded, CSC will purchase items for cancer patients with available funds.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

CSC often receives in kind donations of wigs, chemo caps, and mastectomy pillows, and other similar items from cancer patients who no longer need them. CSC purchases essential items like queasy drops, pill organizers, and more for the comfort kits, while many volunteer groups and businesses work together to collect donations for comfort kits and chemo caps.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Grocery Cards	2000
Priority #2	Gas Cards	1000
Priority #3	Cancer Supplies	5000
Priority #4	Processing Applications	1000
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		9000

# JACK HOPKINS FUNDING CRITERIA

---

## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

A cancer diagnosis can create a sudden financial burden on a family due to increased expenses and lost income. This financial strain can lead to reduced access to transportation, food, and other essential items. CSC provides immediate financial assistance to cancer patients in active treatment cycles to ensure they have the resources they need to maintain transportation to treatments, food, and other health and essential items. Receiving financial assistance during treatments can ease financial burdens for the whole household, reduce anxiety and stress, and increase confidence and hope.

The American Cancer Society produces annual cancer research and data. It defines the cost of cancer in two categories: direct medical costs (total health care expenses) and indirect costs (lost earnings due to illness or premature death). Monroe county residents have experienced significant inflation in the cost of groceries, gas, housing, and other basic needs. Cancer patients cite "financial concerns" as a significant cause of stress or anxiety.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

We are requesting funds for a one time purchase of essential needs items for cancer patients in active treatment. CSC is dedicated to providing this assistance to cancer patients as long as there is funding to support it. If funding is not available, CSC will not be able to provide this kind of assistance in the future.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Providing financial assistance to cancer patients and their families during active treatment cycles allows the patient and their family to focus on their health care needs and attend treatments. Although the impact of the financial assistance is immediate, it can have lasting impact. A few quotes from patients express the long term impact:

“I am 64 years old and live on a single income. I am off work from my job due to my treatment of radiation and chemo. You will never know how much I appreciate your help during this rough time. God Bless you.”

“Thank you so very much! Everything seems more difficult when you have cancer. I also recently lost my mother and her income. I would never have dreamed all this would happen all at once. I have been struggling with all the finances, and I drive 1.5 hours to get to my infusions. I am most thankful and you are an answer to my prayers!

“Since I was diagnosed, my husband had to quit his job to take care of me. The gift cards are a lot of help.”

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

CSC will report on how many cancer patients received financial support with food and transportation, and how many cancer patients received resources (comfort kits, chemo kits, wig fittings, SAVI Bras, etc.).

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

CSC partners closely with IU Health and Olcott Nurse Navigation program to identify cancer patients with the greatest financial need. Additionally, the Olcott program and IU Health provides some resources to breast cancer patients. IU Health staff have informed us that a program they had previously to provide gas cards to cancer patients is running out of funds and will end this year. IU Health staff expect to send an increased number of referrals to CSC for transportation and food assistance.

Since opening in March 2022, CSC has received requests from local radiation centers and chemotherapy infusion centers for supplies. Radiation centers have requested water bottles and calendula cream for patients, and Chemotherapy infusion centers have requested chemo completion kits. Calendula cream is used to ease skin irritation and burns caused by radiation. Water bottles are needed for cancer patients being treated with radiation in the pelvic region. It's critical that the bladder is full when receiving radiation treatment in the pelvic region to protect the organs from being damaged.

The Chemotherapy infusion center in Bloomington has been able to provide cancer patients with completion kits upon completing chemotherapy through a donation. The previous funds are no longer available. Completion kits are designed to celebrate with the patient a successful round of treatment, providing essential and comforting items to the patient.

Another example of essential items CSC provides for cancer patients is SAVI bras. SAVI bras are used by breast cancer patients for a localized application of radiation treatment. The bras are designed to fit around a radiation device that is worn daily, targeting the cancer in the breast.

CSC also provides a wig boutique with free supplies to cancer patients. Each patient may receive one wig, care supplies for a wig, a couple of chemo caps, warm socks, skin care items, and similar items.

Many patients will go without these items due to increased financial burden at the time of treatments. CSC provides these items to cancer patients because they help to improve overall health and promote hope and confidence. Jack Hopkins and the City of Bloomington can make sure these items are available for city residents facing cancer. CSC has secured other funds to support the program for cancer patients in Monroe County, and surrounding areas. This request represents the projected costs to support cancer patients who are also city residents with food, transportation, and cancer supplies.

# 2024 Proposed Project Budget

Cancer Support Community South Central Indiana

*Financial Assistance for Cancer Patients*

**Total Project Cost**

**\$32,430**

	<b>Totals</b>	<b>Other Sources</b>	<b>JHSSF Grant</b>
<b>Funds</b>			
JHSSF			\$ 9,000.00
United Way South Central Indiana		\$ 7,400.00	
Boston Scientific Foundation		\$ 6,000.00	
Sophia Travis Community Service Grant		\$ 4,930.00	
Tri Kappa <i>(Pending)</i>		\$ 3,600.00	
Brown County Community Foundation <i>(Pending)</i>		\$ 1,500.00	
<b>Total Project Funds</b>	<b>\$ 32,430.00</b>	<b>\$ 23,430.00</b>	<b>\$ 9,000.00</b>
<b>Expenses</b>			
Grocery Cards	\$ 11,600.00	\$ 9,600.00	\$ 2,000.00
Gas Cards	\$ 5,800.00	\$ 4,800.00	\$ 1,000.00
Cancer Supplies	\$ 11,780.00	\$ 6,780.00	\$ 5,000.00
Processing Applications	\$ 3,250.00	\$ 2,250.00	\$ 1,000.00
<b>Total Project Expenses</b>	<b>\$ 32,430.00</b>	<b>\$ 23,430.00</b>	<b>\$ 9,000.00</b>



# Cancer Support Community IN

## Profit and Loss

January - December 2023

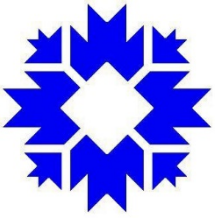
	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PP)
<b>Income</b>		
4000 Contributed Income		
4020 General Contributions	35,544.43	14,200.73
<b>Total 4000 Contributed Income</b>	<b>35,544.43</b>	<b>14,200.73</b>
4040 Corporate Contributions	120,757.04	7,445.50
4110 In-Kind Gifts	887.00	566.00
4210 Foundation Gifts/Grants	353,314.66	377,537.14
4214 GRANTS	5,000.00	
<b>Total 4210 Foundation Gifts/Grants</b>	<b>358,314.66</b>	<b>377,537.14</b>
5500 Earned Income/Contracts	240.00	
5800 Special Events Income	210,951.84	367,820.37
<b>Total Income</b>	<b>\$726,694.97</b>	<b>\$767,569.74</b>
<b>GROSS PROFIT</b>	<b>\$726,694.97</b>	<b>\$767,569.74</b>
<b>Expenses</b>		
7200 Program & Admin Salary Expenses		
7210 Administrative Salaries		4,340.52
7219 Admin Assistant	1,171.60	
<b>Total 7210 Administrative Salaries</b>	<b>1,171.60</b>	<b>4,340.52</b>
7220 Program Salaries	264,744.23	216,985.65
7225 Support Groups	2,700.00	3,350.00
7300 Wellness Programs		
7310 Art Therapy/Art Expressions	7,717.51	5,350.00
7315 Relaxation & Visualization		50.00
7320 Massage Therapy	90.00	
7330 Yoga	1,640.00	1,400.00
7366 Reiki	6,825.00	7,870.00
<b>Total 7300 Wellness Programs</b>	<b>16,272.51</b>	<b>14,670.00</b>
<b>Total 7220 Program Salaries</b>	<b>283,716.74</b>	<b>235,005.65</b>
7240 Employee Benefits	46,328.29	6,722.49
7250 Payroll Tax Expense-FICA	20,498.98	17,679.75
7260 Employee SIMPLE Match		2,268.67
<b>Total 7200 Program &amp; Admin Salary Expenses</b>	<b>351,715.61</b>	<b>266,017.08</b>
7500 Contract Service Expenses	3,787.00	
7560 Other	2,000.00	
<b>Total 7500 Contract Service Expenses</b>	<b>5,787.00</b>	
8100 Office Supplies & Expenses	1,965.86	5,340.61
8110 Office Supplies & Equipment	719.63	369.00
8140 Postage/Postage Refill	1,245.96	651.11
8170 Printing	3,827.91	12,797.94

# Cancer Support Community IN

## Profit and Loss

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PP)
8180 Dues/Subscriptions/Fees	5,121.59	4,428.74
8181 Bank Fees	11.90	
<b>Total 8180 Dues/Subscriptions/Fees</b>	<b>5,133.49</b>	<b>4,428.74</b>
<b>Total 8100 Office Supplies &amp; Expenses</b>	<b>12,892.85</b>	<b>23,587.40</b>
8200 Facility & Equipment Expenses	5,754.70	22,175.34
8220 Utilities	9,047.56	7,133.38
8250 Rental & Maintenance-Facilities	45,643.32	72,791.92
8260.1 Landscape Maintenance	305.01	
<b>Total 8250 Rental &amp; Maintenance-Facilities</b>	<b>45,948.33</b>	<b>72,791.92</b>
8260 Rental & Maintenance-Equipment	5,854.93	
8265 Equipment Maint/IT Services	3,302.08	5,102.52
<b>Total 8260 Rental &amp; Maintenance-Equipment</b>	<b>9,157.01</b>	<b>5,102.52</b>
<b>Total 8200 Facility &amp; Equipment Expenses</b>	<b>69,907.60</b>	<b>107,203.16</b>
8300 Travel Expense	1,291.01	
8310 Vehicle & Parking Expense	942.20	2,505.40
8315 Mileage Expense	390.15	463.59
8320 Training/Travel Expense	13.50	729.84
<b>Total 8300 Travel Expense</b>	<b>2,636.86</b>	<b>3,698.83</b>
8400 Program Costs	15,920.38	10,132.02
8410 Program Supplies	7,219.31	2,161.76
8420 Facilitator Training	1,700.01	800.00
<b>Total 8400 Program Costs</b>	<b>24,839.70</b>	<b>13,093.78</b>
8450 Special Events/Fundraisers	57,219.45	95,111.81
8459 Other	300.00	
<b>Total 8450 Special Events/Fundraisers</b>	<b>57,519.45</b>	<b>95,111.81</b>
8500 Other Expenses	168.88	539.57
8460 Board & Volunteer Expenses	581.72	
8540 Staff Development	859.32	1,335.25
8545 Staff Incentives	1,259.44	203.27
<b>Total 8540 Staff Development</b>	<b>2,118.76</b>	<b>1,538.52</b>
8550 Hospitality	1,424.26	
8560 Facility Rental	17,192.56	
8570 Marketing & PR	53,223.51	38,385.91
<b>Total 8500 Other Expenses</b>	<b>74,709.69</b>	<b>40,464.00</b>
<b>Total Expenses</b>	<b>\$600,008.76</b>	<b>\$549,176.06</b>
<b>NET OPERATING INCOME</b>	<b>\$126,686.21</b>	<b>\$218,393.68</b>
<b>NET INCOME</b>	<b>\$126,686.21</b>	<b>\$218,393.68</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Catholic Charities Bloomington, Inc.

**Address:**

803 N. Monroe Street Bloomington, IN 47404
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**Phone:** (812) 332-1262

**E-Mail:** ecook@ccbin.org

**Website:** https://ccbin.org

**President of Board of Directors:** Judith Williams

**Name of Executive Director:** David Bethuram

**Phone:** 312-236-1530

**E-Mail:** dbethuram@archindy.org

**Name of Grant Writer:** Emily Cook

**Phone:** (812) 332-1262

**E-Mail:** ecook@ccbin.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
8	3	11

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The mission of Catholic Charities Bloomington Counseling Services is to serve all individuals, all couples, and all families by increasing accessibility to quality mental health care in our community.

# PROJECT INFORMATION

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Name of the project to be funded:

Affordable therapy for low-income children and youth

Total cost of project: \$88,150

Requested amount of Jack Hopkins funding: \$27,947

Number of City residents to be served by this project in 2024: 97

Number of clients to be served by this project in 2024: 127

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Catholic Charities Bloomington (CCB) requests \$27,947 to help subsidize our staffing costs associated with providing therapeutic services to Bloomington residents, particularly youth under age 18, whose families utilize our sliding-scale self-payment system. CCB offers an income-based self-payment option to make high-quality mental health care accessible to low-income and un- or under-insured Bloomington residents, and payments can be further reduced due to financial hardships including housing costs, medical expenses, and other factors.

Over the approximate Jack Hopkins funding period in 2023 (August-November), we provided 1,025 therapy sessions to 127 self-pay clients. 800 of these sessions were provided to a total of 97 Bloomington residents; 351 sessions were provided to 44 Bloomington residents under age 18. These services included play therapy for some of our youngest clients and EMDR therapy (an evidence-based approach to help clients process trauma). Typically, CCB would bill \$88,150 for these services; however, clients were only billed \$6,530 (explained in "Other Comments").

The amount requested is based on the unbilled costs for offering this program in August-November 2023 (\$81,620), multiplied by the percentage of sessions provided to Bloomington residents under age 18 (34.24% of sessions). We anticipate that our costs and numbers served will be comparable in 2024.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

N/A

How do your missions, operations and services complement each other?

N/A

What is the existing relationship between agencies?

N/A

How will communication and coordination change as a result of the project?

N/A

Explain any challenges and steps you plan to take to address those challenges.

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

[same as agency address]

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

\$8,000: Charges billed to clients (pending; we anticipate slightly higher billing rates for some clients after revisions to pay scale next fiscal year)  
\$11,000: NAP Credits (pending; conservative estimate based on previous allocations)  
United Way Allocation: \$15,000 (pending; conservative estimate at a lower rate than previous year owing to United Way's 2023 campaign shortfall)  
The remainder of project costs will be covered through income streams generated through Medicaid, Medicare, and private insurance billing, along with individual donations.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

CCB plans to submit monthly reimbursement claims in early September, October, November, and December for services provided to self-paying clients under 18 who reside in Bloomington (less any charges to these clients). Costs will be estimated based on the percentage of services delivered to Bloomington youth and our total unbilled charges for services to self-pay clients.  
For example, if in September 2024, we provide 100 therapy sessions to self-pay clients and 40 of these sessions were provided to city residents under age 18, we would request reimbursement for 40% of our unbilled costs (i.e., the gap between what we charge clients and our costs to provide services) for the program that month.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

CCB is committed to sustaining this project. NAP credits and United Way funding are anticipated in fall 2024, and improved revenue through productivity and cost-sharing measures (described under "one-time investment" below) are anticipated to start yielding early results by summer 2024.

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Securing grant funds will allow us to sustain these services while focusing upcoming outreach efforts on employers and individuals with private insurance (which reimburses CCB at a much higher rate than Medicaid or our self-pay clients). Increasing the number of private-insurance clients we serve will help subsidize the costs of providing care to low-income individuals and families.

CCB is proud to offer innovative, evidence-based therapy which must be delivered or supervised by licensed professionals. However, grant funding could help us more effectively leverage the two master's-level interns we will have next fall by helping us cover the costs of supervision.



## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Staff Time	\$25,752.28
Priority #2	Office Rental	\$2,194.72
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$27,947.00</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Many Bloomington residents struggle with mental-health challenges, which not only impact their quality of life and relationships but can be a significant barrier to sustaining employment, stable housing, and personal safety. County residents report an average of 5.5 days of poor mental health per month, above the Indiana (5.2 days) and US (4.8 days) averages (County Health Rankings [CHR]). Mental health services were identified as a high-priority need in the 2020-2024 Consolidated Plan (p. 90-91) for populations including families with children, who would directly benefit from the proposed project.

Not all Bloomington residents have equal access to mental healthcare; in Monroe County, about 10% of adults and 5% of children are uninsured, making mental health care particularly difficult to access (CHR). Notably, since loosened pandemic-related Medicaid eligibility requirements expired, the percentage of CCB clients utilizing a self-pay option has increased dramatically, from 21% to nearly 33%. Moreover, many studies (e.g., Sareen et al., 2011) have connected lower household income levels to a higher incidence of mood disorders and suicide attempts. CCB's sliding-scale system helps uninsured individuals access care, and our location in Bloomington's Crestmont neighborhood and partnerships with other agencies make therapy accessible to vulnerable youth and families.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

The nominal charges billed to self-pay clients do not begin to cover CCB's operational costs. To sustainably continue this program, we are seeking one-time grant funding while we implement new policies and practices to increase efficiency. Revisions to client payment and attendance policies will reduce no-show rates, maximizing revenue and better leveraging staffing and overhead costs. Strategic allocation of intern assignments will prioritize "billable" work for licensed therapists and develop new revenue streams through a partnership with the Boys and Girls Club (our frequent collaborator and landlord). New cost-sharing efforts with our Archdiocesan sister agencies will free up operational funds.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The National Alliance on Mental Illness (NAMI) states that many mental health conditions first appear in childhood or adolescence, with 50% of all conditions beginning by age 14. Untreated mental illness is associated with higher rates of school dropout among young people, along with increased rates of unemployment, substance misuse, incarceration, and even early death, whereas early intervention is associated with better short- and long-term outcomes (and lower costs for families and communities).

CCB's sliding-scale program benefits dozen of youth each year, who receive high-quality therapeutic services in our office, via telehealth, and onsite at Fairview Elementary School. The benefits these children and adolescents receive from therapy can extend far beyond the individual level, helping them develop more positive relationships with their peers, teachers, and families and promoting their academic and social success.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

CCB will track the number of therapy sessions provided to self-pay youth during the funding period. We all also track the number of new youth self-pay clients who began receiving services during the funding period.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

CCB would typically bill about \$125 per session for most therapeutic services provided at our agency. CCB's sliding scale payment system makes therapy accessible for clients who are unable to afford this rate due to their low income levels, lack of insurance coverage, or extremely high-deductible insurance plans. Rates billed to clients are based on their income level and family size (see attached fee schedule). Based on this schedule, clients whose households fall below the Federal Poverty Level (\$12,880 for a single adult and \$26,500 for a family of four) may be billed between only between \$12 and \$50 per session. However, we recognize that many clients face expenses including childcare, housing costs, or medical bills that make even these rates unaffordable; these clients are invited to complete a financial hardship form outlining household expenses to potentially further reduce their fees (see attachment).

Ultimately, during the period from August 2023 - November 2023 referenced in the grant application, CCB wrote off over 92% of the charges that would have otherwise been billed to sliding-scale clients. For comparison, when we serve clients on Medicaid (representing about 40% of our current client load), we write off about 32% of charges.

CCB's sliding-scale payment system offers a lifeline for clients who might fall through the cracks at other agencies, and the benefits these clients receive through therapy extend to positively impact their communities. Despite the program's high costs to our agency, CCB is committed to building the necessary community support and operational efficiency necessary to keep this program available to Bloomington residents.

## 2024 Catholic Charities Project Budget

Catholic Charities Bloomington		Affordable therapy for low-income children and youth	
Total Project Cost		\$88,150	
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
<b>JHSS Grant</b>			\$27,947
United Way Allocation		15,000.00	
Billed Charges		8,000	
NAP Credits		11,000	
Insurance Billing (non-self-pay clients)		26,203	
<b>TOTAL PROJECT FUNDS</b>	<b>88,150.00</b>	<b>60,203.00</b>	<b>27,947.00</b>
<b>EXPENSES</b>			
Staff Time (approx. \$101.53/session; includes time with patients and administrative time (case notes, prep time, etc.))	81,227.45	55,475.17	25,752.28
Office Rental	6,922.55	4,727.83	2,194.72
<b>TOTAL PROJECT EXPENSES</b>	<b>88,150.00</b>	<b>60,203.00</b>	<b>27,947.00</b>

**FYTD BUDGET VS. FYTD ACTUAL - EXPANDED BY LOCATION**

	All Locations					
	Catholic Charities Bloomington, Inc.			All Locations		
	Year To Date			Year To Date		
	June 30, 2023			June 30, 2023		
	Actual	Budget	Fav (Unfav)	Actual	Budget	Fav (Unfav)
<b>Revenue</b>						
Contribution Revenue	183,638	67,816	115,822	183,638	67,816	115,822
Program Fee Revenue	464,785	686,000	(221,215)	464,785	686,000	(221,215)
Grant Revenue and Other Public Support Revenue	64,437	217,357	(152,920)	64,437	217,357	(152,920)
Fundraising Events - Net	5,202	28,000	(22,798)	5,202	28,000	(22,798)
<b>Total Revenue</b>	<b>\$718,062</b>	<b>\$999,173</b>	<b>\$(281,111)</b>	<b>\$718,062</b>	<b>\$999,173</b>	<b>\$(281,111)</b>
<b>Expenses</b>						
Salaries And Wages Expense	733,304	734,632	1,328	733,304	734,632	1,328
Payroll Taxes And Benefits Expense	157,723	167,375	9,652	157,723	167,375	9,652
Health Care Costs, net						
Health Care Costs, gross						
50201 - Health Claims	4,285	0	(4,285)	4,285	0	(4,285)
Total Health Care Costs, gross	4,285	0	(4,285)	4,285	0	(4,285)
Total Health Care Costs, net	4,285	0	(4,285)	4,285	0	(4,285)
Professional Services Expense	72,290	61,097	(11,193)	72,290	61,097	(11,193)
Admin And Supplies Expense	16,806	14,800	(2,005)	16,806	14,800	(2,005)
Repairs And Maintenance Expense	220	2,040	1,819	220	2,040	1,819
Occupancy Costs	58,333	54,720	(3,612)	58,333	54,720	(3,612)
Bad Debt Expense	(34,000)	0	34,000	(34,000)	0	34,000
Contribution Expense	500	0	(500)	500	0	(500)
Other Expenses	30,820	9,800	(21,020)	30,820	9,800	(21,020)
<b>Total Expenses</b>	<b>\$1,040,281</b>	<b>\$1,044,465</b>	<b>\$4,184</b>	<b>\$1,040,281</b>	<b>\$1,044,465</b>	<b>\$4,184</b>
<b>Change in Net Assets</b>	<b>\$(322,219)</b>	<b>\$(45,292)</b>	<b>\$(276,927)</b>	<b>\$(322,219)</b>	<b>\$(45,292)</b>	<b>\$(276,927)</b>

**FULL FISCAL YEAR BUDGET - EXPANDED BY LOCATION**

	All Locations	
	Catholic Charities Bloomington, Inc.	All Locations
	Year Ending	Year Ending
	06/30/2023	06/30/2023
	Budget	Budget
<b>All amounts in \$000s</b>		
<b>Revenue</b>		
Contribution Revenue	68	68
Program Fee Revenue	686	686
Grant Revenue and Other Public Support Revenue	217	217
Fundraising Events - Net	28	28
<b>Total Revenue</b>	<b>\$999</b>	<b>\$999</b>
<b>Expenses</b>		
Salaries And Wages Expense	734	734
Payroll Taxes And Benefits Expense	168	168
Professional Services Expense	61	61
Admin And Supplies Expense	15	15
Repairs And Maintenance Expense	2	2
Occupancy Costs	55	55
Other Expenses	10	10
<b>Total Expenses</b>	<b>\$1,044</b>	<b>\$1,044</b>
<b>Change in Net Assets</b>	<b>\$(45)</b>	<b>\$(45)</b>

**FYTD ACTUAL - EXPANDED BY LOCATION**

	All Locations	
	Catholic Charities Bloomington, Inc.	All Locations
	Year To Date	Year To Date
	June 30, 2023	June 30, 2023
	Actual	Actual
<b>Change in Net Assets</b>		

	<b>All Locations</b>	<b>All Locations</b>
	<b>Catholic Charities Bloomington, Inc.</b>	<b>All Locations</b>
	<b>Year To Date</b>	<b>Year To Date</b>
	<b>June 30, 2023</b>	<b>June 30, 2023</b>
	<b>Actual</b>	<b>Actual</b>
Revenue		
Contribution Revenue	183,638	183,638
Program Fee Revenue	464,785	464,785
Grant Revenue and Other Public Support Revenue	64,437	64,437
Fundraising Events - Net	5,202	5,202
Total Revenue	718,062	718,062
Expenses		
Salaries And Wages Expense	733,304	733,304
Payroll Taxes And Benefits Expense	157,723	157,723
Health Care Costs, net	4,285	4,285
Professional Services Expense	72,290	72,290
Admin And Supplies Expense	16,806	16,806
Repairs And Maintenance Expense	220	220
Occupancy Costs	58,333	58,333
Bad Debt Expense	(34,000)	(34,000)
Contribution Expense	500	500
Other Expenses	30,820	30,820
Total Expenses	1,040,281	1,040,281
<b>Change in Net Assets</b>	<b>(322,219)</b>	<b>(322,219)</b>

**Catholic Charities Bloomington**  
**Schedule for Fee Reductions**  
**Based on Annual Gross Income and Number in Family**

Income	1	2	3	4	5	Initial Assessment
<b>Up to \$9,999</b>	<b>\$20</b>	<b>\$19</b>	<b>\$18</b>	<b>\$15</b>	<b>\$12</b>	<b>\$25</b>
<b>\$10,000-\$14,999</b>	<b>\$25</b>	<b>\$24</b>	<b>\$20</b>	<b>\$16</b>	<b>\$14</b>	<b>\$30</b>
<b>\$15,000-\$19,999</b>	<b>\$35</b>	<b>\$34</b>	<b>\$30</b>	<b>\$25</b>	<b>\$20</b>	<b>\$45</b>
<b>\$20,000-\$24,999</b>	<b>\$50</b>	<b>\$49</b>	<b>\$45</b>	<b>\$40</b>	<b>\$36</b>	<b>\$60</b>
<b>\$25,000-\$29,999</b>	<b>\$60</b>	<b>\$59</b>	<b>\$52</b>	<b>\$48</b>	<b>\$44</b>	<b>\$70</b>
<b>\$30,000-\$34,999</b>	<b>\$70</b>	<b>\$68</b>	<b>\$61</b>	<b>\$55</b>	<b>\$48</b>	<b>\$80</b>
<b>\$35,000-\$39,999</b>	<b>\$80</b>	<b>\$78</b>	<b>\$71</b>	<b>\$64</b>	<b>\$58</b>	<b>\$100</b>
<b>\$40,000-\$44,999</b>	<b>\$90</b>	<b>\$88</b>	<b>\$82</b>	<b>\$76</b>	<b>\$69</b>	<b>\$115</b>
<b>\$45,000-\$49,999</b>	<b>\$100</b>	<b>\$98</b>	<b>\$91</b>	<b>\$84</b>	<b>\$78</b>	<b>\$125</b>
<b>50,000-59,999</b>	<b>\$120</b>	<b>\$118</b>	<b>\$111</b>	<b>\$104</b>	<b>\$97</b>	<b>\$140</b>
<b>\$60,000+</b>	<b>\$125</b>	<b>\$125</b>	<b>\$125</b>	<b>\$125</b>	<b>\$125</b>	<b>\$150</b>

2/4/2020



**CATHOLIC CHARITIES BLOOMINGTON**

**FEE REDUCTION FORM**

**DATE** \_\_\_\_\_ **CLIENT** \_\_\_\_\_

**THERAPIST** \_\_\_\_\_

**SET FEE** \_\_\_\_\_ **REQUEST REDUCTION TO** \_\_\_\_\_

**PLEASE LIST MONTHLY AMOUNT FOR EACH ITEM BELOW:**

**Rent** \_\_\_\_\_  
**Food** \_\_\_\_\_  
**Transportation** \_\_\_\_\_  
**Medical** \_\_\_\_\_  
**Prescriptions** \_\_\_\_\_  
**Health Insurance** \_\_\_\_\_  
**Car Insurance** \_\_\_\_\_  
**Gas Heat** \_\_\_\_\_  
**Other** \_\_\_\_\_

**Electricity** \_\_\_\_\_  
**Water** \_\_\_\_\_  
**Telephone** \_\_\_\_\_  
**Life Insurance** \_\_\_\_\_  
**Child Care** \_\_\_\_\_  
**Child Support** \_\_\_\_\_  
**School Tuition** \_\_\_\_\_  
**Other** \_\_\_\_\_  
**Other** \_\_\_\_\_

**NUMBER IN FAMILY** \_\_\_\_\_  
**GROSS ANNUAL INCOME** \_\_\_\_\_

**NET MONTHLY INCOME** \_\_\_\_\_

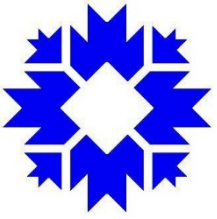
**MONTHLY EXPENSES** \_\_\_\_\_

**MONTHLY BLANCE** \_\_\_\_\_

**CLIENT SIGNATURE** \_\_\_\_\_

**DIRECTOR'S SIGNATURE** \_\_\_\_\_ **APPROVED** \_\_\_\_\_ **DENIED** \_\_\_\_\_

**COMMENTS** \_\_\_\_\_



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** Center for Sustainable Living dba Indiana Solar For All (INSFA)

**Address:** PO Box 1665, Bloomington, IN 47402

**Phone:** 812-391-2259

**E-Mail:** steering@insfa.org

**Website:** insfa.org

**President of Board of Directors:** Stephen Hale, Center for Sustainable Living

**Name of Executive Director:** Woodrow Bessler, Indiana Solar for All

**Phone:** 812-391-2259

**E-Mail:** woodieb@icloud.com

**Name of Grant Writer:** Anne Hedin

**Phone:** 812-327-8514

**E-Mail:** hedincomm@gmail.com

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
		approximately 200 in CSL - nearly 80 in INSFA

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

As a project of the Center for Sustainable Living, Indiana Solar for All (INSFA) is a non-profit program whose mission is to quickly ramp up the spread of rooftop solar in Indiana while making it affordable to those who need it most – the people most burdened by energy costs and most vulnerable to electric rate increases.

INSFA identifies and qualifies households to receive donated materials or materials at reduced cost in return for fulfilling a volunteer labor commitment to install solar systems for themselves and the other members of their funding round, and to help pass on the opportunity to the next group. Financially vulnerable households can thereby reduce their own utility costs and contribute to helping the city achieve its renewable energy goals.

# PROJECT INFORMATION

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Name of the project to be funded:

Indiana Solar For All 2024-25 Installation Season

Total cost of project: \$30,000

Requested amount of Jack Hopkins funding: \$18,000

Number of City residents to be served by this project in 2024: 21

Number of clients to be served by this project in 2024: 3 households

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Indiana Solar for All seeks a one-time investment of \$18,000 from JHSSF to fund the solarization of 3 lower-income homes in Bloomington. The average household income for these households is 58% AMI, with their energy burden ranging from 2% to 12% of annual income.

Since launching in 2018, we have installed solar panels on 44 homes and built a dedicated volunteer base using a sweat equity model and community recruiting. We have over 700 hours of sweat equity labor committed to continue spreading solar in 2024.

Through our supplier, the cost of the solar system for one home is \$5,500-\$6,000, which fluctuates with the market. The installation is done at zero-cost thanks to our committed volunteer base. Thus, every \$6K raised sponsors decades of energy security and financial savings for one household. That household, in turn, helps more homes go solar through their sweat equity commitment. This is by far the most cost-efficient way to spread solar power in our community.

We typically serve 8 households per year, but we only have funding this year for 5 (averaging 39% AMI), due to a funding shortfall following the Indiana Legislature's changes to net metering. \$18,000 would cover the cost of materials to install three additional systems in 2024.

# COLLABORATIVE PROJECTS

---

Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

At the homes of the solar grant recipients  
1818 S Maxwell Street, Bloomington IN 47401  
913 S Eastside Drive Bloomington IN 47401  
1415 W. 11th ST Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

The entire point of this project is to permanently install rooftop solar systems on the property of grant recipients and connect them to the homeowner's account with the utility. This is the only way that the utility will agree to interconnect them to the grid. The system will supply electricity for 3 or 4 decades. . If the original grantee sells the house, the rooftop solar will raise the selling price.

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

The Monroe County Building department issues an electrical permit prior to the installation of the solar system. There is no waiting period. Application for this permit is made after Indiana Solar for All awards the homeowner and schedules the installation. Since the Jack Hopkins Fund makes reimbursement grants, the permit will be covered in due time.

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes

No

**If “yes,” indicate the nature of the operational request:**

Pilot

Bridge

Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

Our fundraising committee is developing a campaign with a goal of raising a total of \$30K by September 1st, 2024, in order to fund panels for all homes currently eligible. A JHSSG would be immediately applied to install 3 systems in Fall 2024. We are seeking sponsorships from other entities (Hoosier Energy, Tri Kappa, the Community Foundation) for additional homes, but none are yet confirmed.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

The solar company that supplies the materials bills for them at the end of the installation season. The Fall 2024 installation season for which these funds are requested is complete by mid-November at the latest. We would submit a claim for reimbursement at that time.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

No additional funding will be needed to achieve the stated objective.

We are pursuing other options to ensure the program's continuation into 2025 and beyond, including a recently submitted Federal grant.

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

If purchased at market rate, these systems would cost twice as much or more. Volunteer labor can thus be valued at \$18,000.

As a CSL project, ISFA receives valuable resources such as banking, website hosting, IT and administrative support.

Whole Sun Designs (now Bone Dry Solar), a professional solar contractor, partners with us to validate the suitability of participating homes and design the panel layout.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Household # 1	\$6,000
Priority #2	Household #2	\$6,000
Priority #3	Household #3	\$6,000
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$18,000</b>



# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2012 SCAN states, " In 2010, 64% of households at the lowest income level struggled to earn enough money to pay for utility bills" and that "There is a greater trend for working households in the middle income brackets to have major difficulties paying expenses compared to 2003." The 2020-2024 Consolidated Plan adds: "According to stakeholders, utility costs are high and rising," adding an uncontrollable energy cost burden to existing housing cost burdens.

These households pay a disproportionate amount of their income for energy, are the most vulnerable to rate increases, are least able to afford a solar system and do not qualify for the federal tax credit.

We directly alleviate this problem for grantees in the corresponding income brackets, and the relief is long-lasting. Solar panels continue producing electricity for decades. Over that period of time, savings from the electric bill become available to cover other necessities, helping families get ahead. It is also worth noting that program participants share energy-cost saving strategies with each other, and some grantees learn valuable trade skills through working on the installation teams.

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

A JHSSG would be immediately applied to purchase solar panels systems for installation in Fall 2024. All other bases are already covered.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

#### **ECONOMIC**

Each 3kW system can last for decades, and is projected to save at least \$15,000 in energy costs over its life time. These benefits will go to households who do not qualify for the Federal income tax credit and would not otherwise be able to afford this green investment.

#### **ENVIRONMENTAL**

According to the EPA, each 3kW system is equivalent to 2 acres of forest in terms of carbon savings. The systems we have installed to date have generated at least 343,700 kilowatt hours (kwh) of electricity, thereby avoiding the release of approximately 300 metric tons of CO2 equivalents.

#### **DIVERSITY & EQUITY**

- We reach out to racially and socioeconomically diverse groups to grow by word of mouth. Participants share skills and build more interconnected, resilient communities. Our community of home owners and volunteers has organically developed strong relationships between Spanish and English speakers, who work together on installations. Our program applications and educational materials are available in both languages. Through volunteer coordination we encourage bilingual and multi-lingual volunteers to help us continue expanding our organization's linguistic and cultural competences

- Approximately 1 in 3 households served is a female-headed household.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Households receiving a solar system immediately see a difference on their electric bill. They can increase those savings by monitoring their production and consumption of electricity from their system and from the grid. The monitoring app displays real-time measurements (accessible to both the homeowner and Indiana Solar for All) that enable the homeowner to learn from feedback how to increase the home's energy efficiency. In addition, both program organizers and participants help teach each incoming group how to make other efficiency improvements that minimize energy costs without sacrificing comfort and convenience.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

This is the first time in five years that Indiana Solar for All has applied for Jack Hopkins Social Services funding. The last time, in 2019, we gratefully received about \$6,000 to purchase safety gear, tools and a trailer which are still in use at every installation. By contrast, though this year's request is three times bigger, Indiana Solar for All will not be acquiring any assets. Every penny spent will end up on the roof of a deserving low-income household.

The fact that we do not own the property we equip with solar has counted against us in some other grant applications. This seems ironic and illogical to us, but it does help explain why there are so few similar sources of assistance for lower income homeowners. With the 5 systems we will fund out of pocket in 2024, we will have created a community of 49 households – a substantial addition to the base of approximately 600 solar owners in Bloomington and Monroe County – who have helped advance the clean energy transition locally. They have put their backs into it, and they are proud of it.

Indiana Solar for All is committed to keeping this option available to LMI households for the long-term. For this reason, the annual ratio of household grants to workers needed on the installation crews and in program support roles has to be maintained in reasonable balance. Each household pays 80 hours of labor into the work pool. Last year 12 households were awarded solar systems, and they are still working off those hours. If we can only install 5 households this year, some people will not be able to satisfy their obligations. The program works because its participants pay it forward and passes on the training they have received. If that momentum stops, the future of Indiana Solar for All is in jeopardy.

Indiana Solar for All is one of a kind. In 2023, the City of Bloomington entered into a new initiative with Habitat for Humanity, whereby Habitat will put solar on the roof of 10 of its homeowners at a cost of \$250,000. This is the only other solar assistance available to private homeowners in LMI brackets. A comparable number of homeowners coming through INSFA could be served for \$60,000. The difference in cost is attributable to the City's and Habitat's requirement of hiring professional installers.

We are not criticizing this decision. We simply point out that our program has operated since 2018 with a 100% safety record. We carry both Accidental Injury and General Liability policies but have never needed to make a claim. We have professionals too – but they are volunteers. This allows us to provide the most cost-effective solution that City money can buy.

Please consider the following as the Project Budget for Indiana Solar for All:

3 solar systems packages @ \$6,000 each. Each package consists of 8 panels with total 3 kilowatt capacity; 1 Solar Edge inverter with online monitoring; racking to fit; 1 juncture box; conduit and cabling to fit; and balance of system components.

The solar supplier finds it more efficient to give us a single price on all the components, rather than take the time to bill each item individually. Thus we do not know the price to the penny beforehand but we have their assurance on the price range being between \$5,500 and \$6,000. We are requesting funding at the more conservative level.

**The Center for Sustainable Living, Project Report:**  
**Indiana Solar For All - Profit and Loss (NOT FINALIZED / NOT AUDITED)**  
 January - December 2023

	ISFA	TOTAL
<b>Revenue</b>		
4000 Donations		\$0.00
4050 Individual Donations	452.00	\$452.00
4100 Corporate Donations	12,346.60	\$12,346.60
4150 Organization Donations	87.23	\$87.23
<b>Total 4000 Donations</b>	<b>12,885.83</b>	<b>\$12,885.83</b>
4200 Grants		\$0.00
4350 Organization Grants	17,800.00	\$17,800.00
<b>Total 4200 Grants</b>	<b>17,800.00</b>	<b>\$17,800.00</b>
Uncategorized Income	0.00	\$0.00
<b>Total Revenue</b>	<b>\$30,685.83</b>	<b>\$30,685.83</b>
<b>GROSS PROFIT</b>	<b>\$30,685.83</b>	<b>\$30,685.83</b>
<b>Expenditures</b>		
6000 Personnel Expenses		\$0.00
6045 Contractors	6,875.81	\$6,875.81
<b>Total 6000 Personnel Expenses</b>	<b>6,875.81</b>	<b>\$6,875.81</b>
6400 Operating Expenses		\$0.00
6410 Space Rental	50.00	\$50.00
6450 Insurance	555.00	\$555.00
6455 Consumables	18.53	\$18.53
<b>Total 6400 Operating Expenses</b>	<b>623.53</b>	<b>\$623.53</b>
6600 Program Expenses	72.31	\$72.31
6615 Tools	214.50	\$214.50
6630 Program Materials	70,339.52	\$70,339.52
<b>Total 6600 Program Expenses</b>	<b>70,626.33</b>	<b>\$70,626.33</b>
7100 Merchant Account Fees	11.44	\$11.44
<b>Total Expenditures</b>	<b>\$78,137.11</b>	<b>\$78,137.11</b>
<b>NET OPERATING REVENUE</b>	<b>\$ -47,451.28</b>	<b>\$ -47,451.28</b>
<b>NET REVENUE</b>	<b>\$ -47,451.28</b>	<b>\$ -47,451.28</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name: Community Justice & Mediation Center**

**Address:**

<b>205 S. Walnut, Suite 16 Bloomington, IN 47404</b>
--

**Phone: 812-336-8677**

**E-Mail: [cjam@cjamcenter.org](mailto:cjam@cjamcenter.org)**

**Website: [www.cjamcenter.org](http://www.cjamcenter.org)**

**President of Board of Directors: Vanessa Roberts**

**Name of Executive Director: Liz Grenat**

**Phone: 812-336-8677**

**E-Mail: [director@cjamcenter.org](mailto:director@cjamcenter.org)**

**Name of Grant Writer: Liz Grenat**

**Phone: Same as above**

**E-Mail: Same as above**

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
<b>1</b>	<b>2</b> (+2 Part-time volunteer professional staff)	<b>55</b>

### **MISSION STATEMENT** (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The Community Justice & Mediation Center's mission is to promote a civil, inclusive, and just community through mediation, education, facilitation, and restorative justice programs. CJAM imagines a just community that learns from conflicts, prevents harm, and deepens its understanding. We're dedicated to ensuring our services are available to all, particularly those who are underserved, and to addressing the changing needs of our community.

# PROJECT INFORMATION

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**Name of the project to be funded:**

Eviction Prevention Project (EPP): Landlord Tenant Mediation, Project Management, and Social Service Referrals & Support

**Total cost of project:     \$60,019**

**Requested amount of Jack Hopkins funding:   \$21,890**

**Number of City residents to be served by this project in 2024:   210**

**Number of clients to be served by this project in 2024:   300**

**PROJECT SYNOPSIS (200 words or less)**

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are seeking \$21,890 to support CJAM’s involvement in the ongoing operations of the Eviction Prevention Project (EPP). The overall goal is to prevent and decrease evictions while enhancing housing stability for renters in Bloomington and Monroe County, especially those in low-income and underrepresented households. Please note: while we are not requesting funds as a collaborative, the Eviction Prevention Project is a collaboration between the Monroe County Courts, CJAM, Indiana Pro Bono and Indiana Legal Services.

The funding will allow CJAM to offer free mediation services and provide social service referrals and guidance to tenants and landlords before, during, or after eviction proceedings. The funds will also support the management of the collaboration, and community outreach/ awareness activities.

This year, we are requesting funds to help launch a new pilot using community volunteers to support tenants during “court checkout”.

These volunteers will provide the following services:

- Check with the tenant for understanding of what happened in court and to clarify what happens next
- Quickly Identify and assess needs for referrals
- Collect demographic data
- Send follow-up referral emails that provide targeted resources and access to legal records



# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

Do you own or have site control of the property at which the project is to take place?

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Is the property zoned for your intended use?

Yes

No

N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Community Foundation of Bloomington; \$ 12,000 confirmed  
NAP: \$1179 Pending  
Fundraising: \$2000 Pending

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit monthly invoices/documentation for expenses incurred at the beginning of the grant award, through the end of the stipulated grant period.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Each week CJAM provides four volunteer mediators, and a volunteer court liaison, at regular eviction and damages hearings, for a total of 5 volunteers@ 3 hours @ 2 sessions @ \$27/hr @ 25 weeks = \$20,250 leveraged dollars. In addition, CJAM volunteer office manager and program director spend a total 4 hours a week @ \$27.00 for 25 weeks, providing administrative/supervisory support = \$2,700, for a total of \$22,950 in-kind support.

# FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	CJAM Staffing	\$19,560
Priority #2	Equip/Technology	\$830
Priority #3	Indirect Costs	\$1000
Priority #4	Pilot Training and Volunteer Recruitment	\$500
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$21,890</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

In Bloomington, 76% of low-income renters, totaling 6,805 households, are severely burdened by housing costs, allocating over 50% of their income towards housing expenses (Source: U.S. Housing and Urban Development Comprehensive Housing Affordability Strategy data, 2011-2015). This financial strain places these renters at a heightened risk of facing eviction.

The Heading Home Plan, updated in March 2021, underscores the importance of preventing homelessness and has outlined key priorities, including: a) enhancing access to and raising awareness of financial assistance and housing stability services; b) expanding access to and promoting awareness of emergency rental assistance funds and eviction diversion strategies; and, c) addressing legal challenges hindering stable housing and identifying ways to increase access to mediation and legal services for those facing housing insecurity.

The 2020 - 2024 HAND Consolidated Plan emphasizes the significance of supporting nonprofit organizations offering services to enhance the quality of life and assist extremely low-income individuals and families in avoiding homelessness. Additionally, the 2012 SCAN identified the lack of affordable legal assistance as a barrier to stable housing.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

We are asking for operational funds that will support our continued programming. We have been working diligently to diversify funding since launching the project in 2019 while keeping up with the increased demand. We continue to identify and seek local, state and/or regional funding sources (government funding, private foundations), in addition to doing fundraising. We have started working with UW/Heading Home to develop a plan to build to sustain these eviction prevention interventions to keep people housed.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

In 2023, 962 new evictions were filed in Monroe County, each representing a traumatic and destabilizing event for individuals and families. These events set off a chain reaction of financial, health, and social challenges, particularly in our county where housing costs rank among Indiana's highest. In addition, these filings impact very low-income and historically marginalized renters disproportionately.

An eviction record presents a formidable barrier to future housing opportunities, often leading to exclusion from government housing assistance programs. Additionally, the repercussions extend beyond housing instability; parents may lose employment due to the upheaval, exacerbating the crisis. Children experience educational disruptions that can detrimentally impact their academic achievement.

In this complex landscape, landlords also grapple with the dilemma of effectively managing tenancy issues, where eviction is rarely viewed as a successful resolution. Research demonstrates that holistic eviction prevention and diversion programs yield positive outcomes. Key components include robust support and guidance from local courts, access to legal counsel, mediation services, social service and housing referrals, navigation assistance, and rent relief measures. These comprehensive interventions empower both tenants and landlords to achieve better outcomes (Ebiinger & Clysdale, 2020).

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

- a) 200 mediations provided (serving 500+ individuals) before or during eviction court proceedings
- b) 70% are city residents
- c) 180 tenants (90 %) are low-income households
- d) 65% of mediated cases will preserve tenancy or mediate a voluntary move-out
- e) 200 referrals will be made for social services, legal guidance, financial assistance, and housing supports
- f) Recruit, train, and supervise six new "Court Checkout" community volunteers.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Eviction rates in Bloomington/Monroe County have been on the rise, exacerbated by economic challenges and high housing costs. The repercussions of eviction extend far beyond the individuals and families directly affected, impacting our community's stability, health, and well-being. CJAM plays a crucial role as a community partner, offering mediation services to landlords and tenants both during and outside of court hours, and assisting tenants with referral support.

Here's a closer look at the services we provide:

1. **Support Continuity of Housing through Mediated Agreements:** CJAM provides mediation services to negotiate agreements between landlords and tenants during eviction court hearings, to keep tenants housed/or avoid an eviction on their record. We also engage in pre-eviction mediation whenever possible, which allows landlords and tenants to avoid having to attend court by having the case dismissed. Post-eviction, we provide outreach and follow-up support to both landlords and tenants when needed.
2. **Rental Assistance Referrals:** We connect tenants and landlords with resources such as the IHCDA COVID relief application portal. We also provide tenants with the contact information for their Township Trustee, along with other community resources, facilitating rental assistance applications. This not only supports ongoing tenancy but also provides landlords with additional income streams.
3. **Temporary Housing/Shelter Referrals:** In cases where tenants are vacating without alternative housing options, we offer referrals to local shelters for temporary housing, along with food assistance and case management support.
4. **Court Checkout Support:** We believe the Court Checkout volunteer pilot program will help to effectively leverage community resources and ease the backlog at eviction hearings. These volunteers will assist tenants by helping to alleviate anxiety, provide timely information about the eviction process and next steps, help to identify needed resources and support individuals to take proactive steps towards improving their situation.
5. **Enhanced Efficiencies through Collaboration:** Our collaborative reviews program outcome data and demographics every quarter to improve services and identify trends. We work to improve communication and efficiency with our partners. As an example, in 2023 CJAM set up a Slack account so that our mediators and collaborating partners can communicate during court, access court dockets, upload agreements, and share other important documents. CJAM provides a Court Liaison position, a volunteer who aids the court in tracking services and moving parties into the various breakout rooms. CJAM also conducts regular mediation debrief sessions and holds bi-monthly meetings with all collaborators, as well as quarterly meetings with the courts to review data and ensure effective collaboration and coordination.

Through these comprehensive services and initiatives, CJAM/EPP strives to mitigate the impact of eviction and promote housing stability for all members of our community.

2024 CJAM - Jack Hopkins Budget Request

Community Justice & Mediation Center (CJAM)		Eviction Prevention Project	
Total Project Cost			
FUNDS	Totals	Other	JHSS Grant
JHSS Grant	\$21,890	\$0	\$21,890
Other Grants	\$13,179	\$13,179	\$0
CJAM Pro-Bono Mediator and Admin Time	\$22,950	\$22,950	\$0
Fund Raising	\$2,000	\$2,000	\$0
<b>TOTAL PROJECT FUNDS</b>	<b>\$60,019</b>	<b>\$38,129</b>	<b>\$21,890</b>
EXPENSES	Totals	Other	JHSS Grant
<b>Staffing</b>			
CJAM Director	\$6,250	\$6,250	\$0
CJAM Landlord-Tenant Case Manager: 8 hrs./week @ \$26 hr. for 25 weeks	\$5,200	\$1,040	\$4,160
CJAM Assistant Case Manager: 40 hrs/wk hrs @ \$20/hr for 25 weeks	\$20,000	\$6,000	\$14,000
Fringe: \$14,000 @10%	\$1,400	\$0	\$1,400
CJAM Pro-Bono Mediator and Admin Time	\$22,950	\$22,950	\$0
<b>Project Supplies</b>			
Printing	\$500	\$500	\$0
Office and Program supplies	\$300	\$300	\$0
<b>Equipment &amp; Technology</b>			
Facilicase Database: \$130/mo x 5 months	\$650	\$0	\$650
2 Cell Phone #2/CJAM Landlord-Tenant Intake Line: \$18/mo x 5months	\$180	\$0	\$180
<b>Other</b>			
Court Checkout Training and Volunteer Recruitment	\$500	\$0	\$500
Indirect Costs @ 10%	\$2,089	\$1,089	\$1,000
<b>TOTAL PROJECT EXPENSES</b>	<b>\$60,019</b>	<b>\$38,129</b>	<b>\$21,890</b>



**Community Justice & Mediation Center**  
**Balance Sheet**  
 As of December 31, 2023

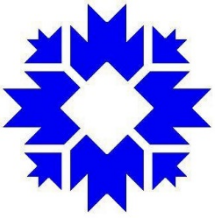
			Dec 31, 23
<b>ASSETS</b>			
Current Assets			
Checking/Savings			
	1000	· Old National Bank Checking One	63,076.25
	1060	· Old National Savings	50,035.20
	1080	· IIU Credit Union Savings	5.00
	1500	· Old National Bank Checking Two	64,830.85
Total Checking/Savings			177,947.30
Other Current Assets			
1090 · Certificates of Deposit			
	1091	· Certificate of Deposit One	51,156.21
	1092	· Certificate of Deposit Two	50,926.28
Total 1090 · Certificates of Deposit			102,082.49
Total Other Current Assets			102,082.49
Total Current Assets			280,029.79
<b>TOTAL ASSETS</b>			<b>280,029.79</b>
<b>LIABILITIES &amp; EQUITY</b>			
Liabilities			
Current Liabilities			
Other Current Liabilities			
	2100	· Payroll Liabilities	3,010.89
	2310	· Deferred RWJ Contract Revenue	245,608.94
Total Other Current Liabilities			248,619.83
Total Current Liabilities			248,619.83
Total Liabilities			248,619.83
Equity			
	3001	· Opening Bal Equity	20,162.00
	3010	· Unrestrict (retained earnings)	65,104.58
Net Income			(53,856.62)
Total Equity			31,409.96
<b>TOTAL LIABILITIES &amp; EQUITY</b>			<b>280,029.79</b>

**Community Justice & Mediation Center**  
**Profit & Loss**  
January through December 2023

	<b>Jan - Dec 23</b>
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
<b>4000 · REVENUE</b>	
<b>400 · CJAM Income</b>	
410 · Government Grants	5,280.00
415 · RWJ Grant	91,744.49
420 · Private Grants	65,750.00
425 · County Contract	20,000.00
426 · Other Contracts	5,000.00
<b>430 · Contributions/Gifts</b>	
431 · Individual Contributions/Gifts	4,689.00
432 · NAP contributions	19,950.00
433 · Corporate/Organizational Suppor	250.00
<b>Total 430 · Contributions/Gifts</b>	24,889.00
<b>440 · Fundraisers/Events</b>	
441 · Harvest Gathering	16,364.78
443 · Miscellaneous Fundraising	412.81
<b>Total 440 · Fundraisers/Events</b>	16,777.59
445 · Endowment Distribution	626.00
450 · Training/Education	5,290.00
<b>460 · Client Fees</b>	
462 · STEP	760.00
<b>Total 460 · Client Fees</b>	760.00
470 · Interest	2,092.80
475 · Miscellaneous	1,128.80
<b>Total 400 · CJAM Income</b>	239,338.68
<b>4000 · REVENUE - Other</b>	0.00
<b>Total 4000 · REVENUE</b>	239,338.68
<b>Total Income</b>	239,338.68
<b>Gross Profit</b>	239,338.68
<b>Expense</b>	
4001 · Reconciliation Discrepancies	(100.00)
<b>5000 · EXPENDITURES</b>	
<b>500 · Personnel</b>	
510 · Salaried	49,999.92
520 · Hourly 1	29,228.40
530 · Hourly 2	38,772.00
540 · FICA	10,557.02
550 · Federal Unemployment	164.73
560 · IN Unemployment Tax	1,154.99
580 · Pyroll Expenses	96.00
<b>Total 500 · Personnel</b>	129,973.06
<b>5100 · VORP Personnel Expense</b>	
5110 · Salaried Employees	20,000.00
<b>Total 5100 · VORP Personnel Expense</b>	20,000.00
<b>600 · PR/Marketing</b>	655.29

**Community Justice & Mediation Center**  
**Profit & Loss**  
January through December 2023

	<b>Jan - Dec 23</b>
605 · Communications	4,009.65
620 · Contracting	
621 · Contract One	6,018.32
622 · Contract Two	27,578.50
623 · Contract Three	1,700.00
624 · Contracting Four	15,471.53
<b>Total 620 · Contracting</b>	<b>50,768.35</b>
630 · Equipment	1,071.52
635 · Fundraising	
636 · Cashinq	1,203.46
637 · Harvest Gathering	6,565.31
638 · Other Fundraising Expense	2,490.96
639 · Other Fundraisers	0.00
<b>Total 635 · Fundraising</b>	<b>10,259.73</b>
640 · Insurance	
641 · Directors/Off Insurance	1,422.00
642 · Property Insurance	1,234.10
643 · Worker's Comp	949.00
<b>Total 640 · Insurance</b>	<b>3,605.10</b>
650 · Miscellaneous	
651 · Replacement checks	6,145.08
<b>Total 650 · Miscellaneous</b>	<b>6,145.08</b>
660 · Office Supplies	1,421.61
665 · Accountintg Update	480.87
680 · Postage	180.00
700 · Rent & Utilities	11,571.02
705 · Program Expense	0.00
710 · Subscriptions/Memberships	605.00
730 · Training/Education	83.36
770 · Board Support	268.26
835 · RWJ Meeting Expense	
8351 · RWSLocal Meeting Expense	1,992.40
<b>Total 835 · RWJ Meeting Expense</b>	<b>1,992.40</b>
840 · RWJ Miscellaneous	
8403 · RWJ Stipends	100.00
<b>Total 840 · RWJ Miscellaneous</b>	<b>100.00</b>
5000 · EXPENDITURES - Other	105.00
<b>Total 5000 · EXPENDITURES</b>	<b>243,295.30</b>
<b>Total Expense</b>	<b>243,195.30</b>
<b>Net Ordinary Income</b>	<b>(3,856.62)</b>
<b>Net Income</b>	<b>(3,856.62)</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

---

**Lead Agency Name:** Community Kitchen of Monroe County, Inc.

**Address:**

PO Box 3286 (1515 S Rogers St) Bloomington IN 47402-3286
---

**Phone:** 812-332-0999

**E-Mail:** director@monroecommunitykit

**Website:** monroecommunitykitchen.com

**President of Board of Directors:** Kyla Cox Deckard

**Name of Executive Director:** Vicki Pierce

**Phone:** 812-332-0999

**E-Mail:** director@monroecommunityki

**Name of Grant Writer:** Vicki Pierce

**Phone:** 812-332-0999

**E-Mail:** director@monroecommunityki

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
6	14	about 120/wk

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Community Kitchen's mission is to work alone and in collaboration with others, to eliminate hunger in Monroe County and surrounding areas through direct service, education and advocacy.

## PROJECT INFORMATION

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Name of the project to be funded:

Express Rebuild Equipment Replacement

Total cost of project: \$18,184.64

Requested amount of Jack Hopkins funding: \$18,184.64

Number of City residents to be served by this project in 2024: 3,280

Number of clients to be served by this project in 2024: 4,000

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We request \$18,184.64 for new equipment for our Express Rebuild project. Express has been in poor condition for quite a while. We will raise and rebuild that this spring, and would like to replace the equipment there also. The equipment there is minimal but essential to serving warm meals and cold, reheatable meals to folks who are residents of Crestmont and the surrounding area.

The equipment up there is not in ideal condition. The juice cooler is more than 20 years old. While it still works, the design makes it less than ideal for our use and we don't know how long it will last. The steam table and the reach-in cooler were used equipment donations from restaurants years ago when our previous units died. Lastly, the warmer up there is one that we moved there when we replaced it with a new one at Rogers St. While it still works, it heats inconsistently. Since food is held for a much shorter period of time at Express, we could manage that while we needed to.

As we build this new building and look at operations there, it is the perfect time to replace the older very used pieces of equipment.

# COLLABORATIVE PROJECTS

---

Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

1100 W 11th St  
Bloomington IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**Is the property zoned for your intended use?**

Yes

No

N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

Approvals are not needed for this equipment purchase part of the larger project. However, we have received all necessary approvals and permits for the rebuild project.



# PROJECT COSTS

---

**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

We have worked to raise approximately \$460,000 of the nearly \$650,000 required to rebuild Express and add solar panels. We have some other potential grant sources that we are waiting on word from, that would help fund the rebuild project. All of our other fundraising efforts are going towards the building project and operations.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will purchase equipment just as soon as funding is awarded and file our claims promptly. I would expect that would all be wrapped up in July or August.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Not having to roll the equipment purchase into our public capital campaign allows us to leverage those funds for completing the actual construction and funding the operations of the facility for the first year. On a project of this magnitude it is essential to leverage all opportunities available to us.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	T-49 True reach-in cooler	\$5000
Priority #2	GDM-49 True glass door reach-in	\$4500
Priority #3	CresCor mobile hot food cabinet	\$4300
Priority #4	Duke EconoMate portable buffet	\$4384.64
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$18,184.64</b>

# JACK HOPKINS FUNDING CRITERIA

---

## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Community Kitchen addresses Priority Need #3 (Public Services) of the current Consolidated Plan. The description of Public Service includes "food access," which Community Kitchen clearly addresses in a meaningful way, as we are the largest provider of free meals in the community. Goal #7 of the Plan mentions the City's goal to "Fund organizations providing services lifting individuals out of poverty, including financial assistance, food assistance, shelter, education, and more." (p.104)

According to p. 58 of the City of Bloomington's current Consolidated Plan, food access is a concern in our city: "Additionally, food access was a major concern for stakeholders. According to Feeding America, 16.8% of Monroe County residents (24,260 people) are food insecure, above the national food insecurity rate of 12.5%. The population in Bloomington receiving assistance for food access are almost entirely very low income, or households with incomes 50% or less than the area median family income."

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This is a one-time investment in equipment. Since this is commercial kitchen equipment and we work to maintain and maximize the life of our equipment, it is expected to last at least 10-15 years, maybe 20.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The Crestmont community is Bloomington's largest low-income housing area. As such, our services are expected to always be needed in that area. As long as we are able to serve, folks in that community will have access to the regular nutrition needed to sustain them, help with chronic medical conditions, and provide proper nutrition for growth and development. For children, growing up with regular access to proper nutrition is linked to age appropriate growth and development, success in school, reduction in contacts with the justice system and positives in future education and employment. For all individuals, proper and regular nutrition is positively linked with one's ability to maintain employment and manage chronic health issues. Providing quality food services to the residents of Crestmont and the surrounding area provides very broad and long-lasting benefits to residents and the community as a whole.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Completing the Express Rebuild project and replacing this equipment will provide the Crestmont residents access to high quality nutrition in a more dignified location. New equipment always adds to our efficiency but in this case that efficiency will mostly show in consistency of food quality and is difficult to measure. We also expect this rebuilt location to draw additional folks to our services.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

We appreciate a history of funding from this committee. While our request this year is larger than many of our more recent requests, we are working to preserve funding wherever possible right now. We are in the early stages of this Express Rebuild. With some funding for this project still unsecured right now, we want to maximize funding opportunities where possible.

Community Kitchen  
Project Budget - Express Rebuild Equipment Replacement 2024

<b>Item</b>	<b>Cost</b>
1. T-49 True reach-in cooler	\$5,000
2. GDM-49 True glass door reach-in	\$4,500
3. CresCor mobile hot food cabinet	\$4,300
4. Duke EconoMate portable buffet	\$4,384.64
<b>Total</b>	<b>\$18,184.64</b>

PROPOSAL SUBMITTED TO 375-7715

STREET Community Center PHONE 332-0999 DATE 3-27-2024

CITY, STATE and ZIP CODE Livestock Market Community JOB NAME Att. Vidy

ARCHITECT Witdun.com DATE OF PLANS \_\_\_\_\_ JOB PHONE \_\_\_\_\_

We hereby submit specifications and estimates for:

- \* Estimate for new True Mfg under + Over Car set
- Line # H135UALL Over Car mobile hot  
 food cabinet on casters = 4,100.00
- Line Estimate freight/shipping = 700.00
- Line # T-49-MC True Mfg PE Cooler unit  
 on casters (freight included) = 5,000.00
- Line # ADM-49-MC True Mfg glass low PE  
 cooler unit (freight included) = 4,500.00

**We Propose** hereby to furnish material and labor — complete in accordance with above specifications, for the sum of:

Payment to be made as follows: Net 30 days dollars (\$ \_\_\_\_\_).

All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado and other necessary insurance. Our workers are fully covered by Workman's Compensation Insurance.

Authorized Signature [Signature]  
 Note: This proposal may be withdrawn by us if not accepted within 30 days.

**Acceptance of Proposal** — The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Date of Acceptance: \_\_\_\_\_ Signature \_\_\_\_\_  
 Signature \_\_\_\_\_

To Reorder:  
 800-225-6380 or nebs.com





**\$3,954.00/Each**

**Shipping Cost: \$430.64**

Shipping to [Bloomington-47403](#) ▾

— 1 +

338

**ADD TO CART**



## Product details

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Duke DPAH-4-HF EconoMate Portable Buffet is a handy unit that holds your plates, cutlery, and food for customer convenience. Using a buffet unit is ideal for catered events and self-service restaurants so that the guests can prepare their food plate. You can serve hot and delicious food items in this EconoMate buffet table. This unit is made from heavy-duty, painted steel for reliability and long-lasting performance. Its black color makes the buffet unit look attractive and perfect to place in any kind of foodservice setting. There are four (4) galvanized wells that keep your food warm and at an optimum temperature so that the customers are not disappointed. Each well is insulated for heat retention. The infinite switches connected to an electrical element to control each well independently so that there are no chances of burning. On top of the well, there is a clear plexiglass canopy which provides visibility while retaining food temperature at the same time. It comes with black powder steel brackets and end closures for stability and positive closure.

Duke's Buffet table has an enclosed cabinet at the bottom for you to store plates, cutlery, dressings, napkins, and other things required for a perfect service. This cabinet comes with two (2) sliding doors with flush pull handles for easy accessibility at the time of loading and unloading. This unit features (4) 5" swivel casters (2 with brakes) for easy movement throughout the area, including narrow spaces. The buffet table comes with 6' cord and plug set for installation. You can choose from 120V, 208V, or 240V single phase electrical connection depending on your requirement.

### Product Features

- Duke Model #DPAH-4-HF EconoMate Portable Buffet for catered events and self-service restaurants
- Used to serve hot food items
- Made from heavy-duty, painted steel for reliability and long-lasting performance
- Black finishing looks attractive
- (4) galvanized wells to keep food warm and at optimum temperature
- Each well is insulated for heat retention
- Infinite switches connected to electrical element and control each well independently
- Clear plexiglass canopy on top provides visibility and temperature consistency
- Black powder steel brackets and end closures for stability and positive closure
- Enclosed cabinet at bottom for storage purposes
- (2) sliding doors with flush pull handles for easy accessibility during loading and unloading
- (4) 5" swivel casters (2 with brakes) for easy movement
- 6' cord and plug set for installation
- Choose from 120V, 208V, or 240V single phase electrical connection depending on requirement

## Specifications

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VPN	DPAH-4-HF (240V, HOLLYBERRY RED)
Unit	Each
Weight	674.969100
Brand	Duke
Style	Mobile
Type	Hot Buffet Table
Width	58.375 Inches

Community Kitchen of Monroe County, Inc.

Profit & Loss by Class

January through December 2023

	Building Fund	General	TOTAL
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
Head Start	0.00	205,818.60	205,818.60
<b>INCOME</b>			
Business/Professional	0.00	23,728.00	23,728.00
Church	0.00	14,239.53	14,239.53
Civic	0.00	5,950.00	5,950.00
Collection Cans	0.00	717.58	717.58
Individual Contributions	57,771.03	472,859.52	530,630.55
Interest	0.00	259.82	259.82
<b>Special Events Income</b>			
Cookie Fundraiser	0.00	3,960.00	3,960.00
Brunch	0.00	32,745.00	32,745.00
Chef's Challenge	0.00	19,300.80	19,300.80
Taste of Bloomington	0.00	5,000.00	5,000.00
Special Events Income - Other	0.00	1,946.11	1,946.11
<b>Total Special Events Income</b>	0.00	62,951.91	62,951.91
<b>Total INCOME</b>	57,771.03	580,706.36	638,477.39
<b>Grant Income</b>			
CACFP	0.00	75,063.17	75,063.17
CDBG Grant	0.00	16,807.96	16,807.96
EFSP Grant	0.00	3,253.00	3,253.00
Local Govt./Townships	50,000.00	38,425.10	88,425.10
Misc. Grants/Other	60,000.00	40,028.55	100,028.55
SFSP	0.00	46,283.34	46,283.34
United Way Grant	0.00	40,898.63	40,898.63
Grant Income - Other	0.00	50,020.82	50,020.82
<b>Total Grant Income</b>	110,000.00	310,780.57	420,780.57
BOBPAN-Perry Twp. Pantry	0.00	2,007.54	2,007.54
CK Express Pantry-Blmtn Twp.	0.00	591.28	591.28
<b>In-Kind Income</b>			
<b>Food Donations</b>			
Food Bank In-Kind	0.00	242,150.53	242,150.53
Food Donations - Other	0.00	167,654.54	167,654.54
<b>Total Food Donations</b>	0.00	409,805.07	409,805.07
Labor	0.00	270,094.43	270,094.43
Non-Food Donations	0.00	15,809.08	15,809.08
<b>Total In-Kind Income</b>	0.00	695,708.58	695,708.58
<b>Uncategorized Income</b>	0.00	1.76	1.76
<b>Total Income</b>	167,771.03	1,795,614.69	1,963,385.72
<b>Expense</b>			
<b>EXPENSES</b>			
Technology Services	0.00	1,299.96	1,299.96
<b>Automobile Expense</b>			
Gas Expense	0.00	7,050.06	7,050.06
Registration & Plates	0.00	1,445.80	1,445.80
Vehicle Repairs	0.00	5,827.20	5,827.20
Vehicle Insurance	0.00	6,824.36	6,824.36
Automobile Expense - Other	0.00	3,912.71	3,912.71
<b>Total Automobile Expense</b>	0.00	25,060.13	25,060.13
Bank Service Fees	0.00	6,241.19	6,241.19
BOBPAN-Perry Twp Pantry	0.00	2,101.59	2,101.59
CK Express Pantry-Blmtn. Twp.	0.00	570.76	570.76
<b>Food &amp; Beverage Expense</b>			
Head Start	0.00	62,927.03	62,927.03
Backpack Buddies	0.00	29,425.62	29,425.62
CACFP	0.00	52,687.35	52,687.35
SFSP	0.00	37,577.37	37,577.37
Food & Beverage Expense - Other	0.00	41,763.49	41,763.49
<b>Total Food &amp; Beverage Expense</b>	0.00	224,380.86	224,380.86
Fundraising	0.00	13,971.44	13,971.44

## Community Kitchen of Monroe County, Inc.

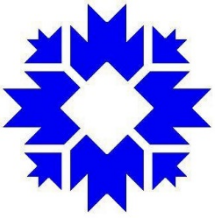
## Profit &amp; Loss by Class

January through December 2023

03/29/24

Accrual Basis

	Building Fund	General	TOTAL
<b>Gen. Repairs/Maint. Svcs.</b>			
Building Repairs	0.00	2,635.92	2,635.92
Equipment Repairs	0.00	6,941.95	6,941.95
Trash	0.00	4,169.75	4,169.75
Gen. Repairs/Maint. Svcs. - Other	0.00	10,898.98	10,898.98
<b>Total Gen. Repairs/Maint. Svcs.</b>	0.00	24,646.60	24,646.60
<b>Insurance</b>			
Directors & Officers	0.00	2,469.50	2,469.50
Health Insurance	0.00	51,210.98	51,210.98
Liability & Worker's Comp	0.00	9,126.79	9,126.79
Life Insurance	0.00	3,007.22	3,007.22
<b>Total Insurance</b>	0.00	65,814.49	65,814.49
<b>Kitchen</b>			
Physical Plant Equipment	0.00	866.77	866.77
Physical Plant Supplies	0.00	41,971.00	41,971.00
<b>Total Kitchen</b>	0.00	42,837.77	42,837.77
<b>Office Equipment</b>			
Computer & Software	0.00	5,078.67	5,078.67
Office Equipment - Other	0.00	66.86	66.86
<b>Total Office Equipment</b>	0.00	5,145.53	5,145.53
<b>Office Supplies</b>	0.00	2,073.63	2,073.63
<b>Organiz. Memberships/Filing Fee</b>	0.00	291.99	291.99
<b>Other/Contingency</b>	0.00	1,235.30	1,235.30
<b>Payroll Expenses</b>	0.00	570,748.31	570,748.31
<b>Payroll Taxes</b>			
FICA-Company	0.00	32,730.27	32,730.27
FUTA	0.00	-1,073.06	-1,073.06
Medicare-Company	0.00	7,654.66	7,654.66
SUTA	0.00	940.77	940.77
<b>Total Payroll Taxes</b>	0.00	40,252.64	40,252.64
<b>Postage</b>	0.00	5,527.63	5,527.63
<b>Printing</b>	0.00	11,590.45	11,590.45
<b>Professional Fees</b>	0.00	10,950.00	10,950.00
<b>Subscriptions</b>	0.00	1,087.08	1,087.08
<b>Telephone &amp; internet</b>	0.00	3,440.67	3,440.67
<b>Utilities</b>	0.00	21,186.12	21,186.12
<b>Volunteer Recognition</b>	0.00	1,711.41	1,711.41
<b>Total EXPENSES</b>	0.00	1,082,165.55	1,082,165.55
<b>In-Kind Expenses</b>			
<b>Food Donations</b>			
Food Bank In-Kind	0.00	242,150.53	242,150.53
Food Donations - Other	0.00	166,003.02	166,003.02
<b>Total Food Donations</b>	0.00	408,153.55	408,153.55
<b>Labor</b>	0.00	270,094.43	270,094.43
<b>Non-Food Donations</b>	0.00	4,566.53	4,566.53
<b>Total In-Kind Expenses</b>	0.00	682,814.51	682,814.51
<b>Total Expense</b>	0.00	1,764,980.06	1,764,980.06
<b>Net Ordinary Income</b>	167,771.03	30,634.63	198,405.66
<b>Net Income</b>	<b>167,771.03</b>	<b>30,634.63</b>	<b>198,405.66</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** Courage to Change Sober Living

**Address:**

P.O. Box 3001 Bloomington, Indiana 47402
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**Phone:** 812-742-1676

**E-Mail:** c2csoberliving@gmail.com

**Website:** couragetochangehouse.org

**President of Board of Directors:** Misty James

**Name of Executive Director:** Marilyn Grimes

**Phone:** 812-391-530

**E-Mail:** c2csoberliving@gmail.com

**Name of Grant Writer:** Bobby Overman

**Phone:** 8123200508

**E-Mail:** bobbyjpcv@gmail.com

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
	4	<12

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Courage to Change Sober Living provides safe, sober affordable staff and peer supported, sober living residences to those suffering from substance misuse in Monroe County. We started in 2015 with 1 small apartment serving 5 individuals to having 3 men's and 3 women's houses serving 41 individuals at one time. Our houses are overseen by our Executive Director, two house managers and board members. Our residences have been certified as recovery residences by the Indiana Affiliation of Recovery Residences and we are re-certified each year. Most of our residents come to us from the Indiana Department of Corrections, Monroe County Judges, Drug Court, Re-Entry Court and other treatment centers. We provide stable, sober and safe transitional housing along with recovery meetings, employment help, drug testing, referral to other social service agencies, therapeutic meetings, recovery plan help, mentoring and an environment where our residences can take charge of their own recovery while being supported by staff and peers. We are proud of being recognized by the Indiana Affiliation of Recovery Residences for maintaining the high standards set out by that organization as well as continuing to provide safe and sober housing options to marginalized community members who face so many barriers not only in terms of housing but also in terms of employment and the stigma attached to formerly incarcerated individuals.

## PROJECT INFORMATION

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Name of the project to be funded:

Wrap Around Rental Help

Total cost of project: \$15,260

Requested amount of Jack Hopkins funding: \$7820

Number of City residents to be served by this project in 2024: 47

Number of clients to be served by this project in 2024: 47

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$7820 for our Wrap-Around Rental Program. JH funding would provide (3) \$290 Fresh Start rental scholarships each month for residents who come into our program and (4) \$650 Graduate Scholarships for residents who have graduated our program and need financial help moving into their own housing. Folks coming into our program come to us with little or no resources to pay their first months rent and the Fresh Start Rental Program provides folks with breathing room to find employment, get settled into our houses, find a sponsor, and for most get acclimated to life after incarceration. The Graduation Scholarships help residents pay their deposit, first month's rent or rental application fees so they can move into their own safe and affordable housing.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

The project will take place at each of our 6 rental houses. 4525 Sunset Avenue; 1201 W Greentree Lane; 1860 S Walnut; 2425 S Rogers; 301/305 S Rogers. All are in Bloomington, Indiana.

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*



# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

Smithville Foundation: \$2500 confirmed (Fresh Start Rental Scholarships) End date October 2024  
City of Bloomington Downtown Outreach Grant: \$7540 Confirmed (Fresh Start Rental Scholarships  
End date December 2024)

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will follow the reimbursement plan as outlined by Jack Hopkins and will complete the draw down of funds in December 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We have funding for our Fresh Start Rental Scholarship program and Sober Joe Coffee provides monies for one scholarship a month to residents of Courage To Change Sober Living.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Rental Scholarships	\$5220
Priority #2	Graduate Rental Help	\$2600
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>7820</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2015-2019 Consolidated Plan, Priority Needs Section, Strategy 5 points 1-3, "Provide funding to non-profit organizations that serve low income individuals/families with their basic emergency needs: food, shelter and health care. Provide funding to non-profit organizations that provide a safety net for community members in need. Provide funding to non-profit organizations that provide valuable services to improve quality of life." This project serves our clients in all of these areas by providing shelter/rental scholarships to folks coming into our program; a safety net for those graduating our program and working to afford their own safe housing and while in our program improving our residents quality of life by providing staff and peer supported transitional housing and case management.

The SCAN report notes essentials are the basic needs of individuals and families: sufficient food, a stable place to live, health care/ wellness, and crisis management skills. Barriers like unemployment, low wage rates, mental and physical illness, exposure to violence, substance abuse, and disabilities can prevent individuals from meeting these basic needs. CTC addresses these issues by providing sober living transitional housing as well as case management, employment help, help accessing other social services and recovery plan and support.

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

We will continue to request funding for this program in the future from other funders as this program is very important to our residents and to CTC overall. Sober Joe Coffee is a local business that has supported this program for many years and will continue to do so in the future. We have previously received grants for the Fresh Start Program and our Graduate Rental Help program from other funders and donors and will continue to seek out funding in the future. We also set aside monies received from private donors specifically for our scholarship program.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Our residents come to us from the criminal justice system and lack funds, employment, family or community ties and need breathing room to focus on finding a sponsor, employment, satisfying court requirements, getting accustomed to living in our residences, re-entering the community without worrying about how they will pay the first two weeks of rent. Graduation scholarships help folks that need help paying the first months rent/deposit. Housing is a big issue for everyone in the community but formerly incarcerated people, even those who have successfully graduated a program such as ours still are 10 times more likely to be homeless than the general public and 13 times more likely if they've been incarcerated more than once.(Prison Policy Initiative (2018) Our residents face other barriers including working low paying jobs, having evictions and felonies on their records and not being able to come up with a deposit, first month/last month's rent. Providing rental scholarships when folks first come to us and also when they graduate has a lasting impact on our residents and our community by making sure our residents don't become part of the unhoused population as they continue on their recovery journey.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

**Fresh Start:**

number of applicants; did the scholarship help the resident stay in the program; was the scholarship amount appropriate; ease of applying for the scholarships; immediate impact on recipients who received scholarships; feedback from recipients.

**Graduate Rental Help:**

difficulty in finding appropriate housing; how many applicants; how long does it take graduates to find appropriate housing; are graduates having to extend their stay with CTC because of lack of safe and affordable housing and if yes how long is that extension; is \$650 an appropriate amount; are there other costs that impede recipients finding housing.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Courage to Change Sober Living opened up another men's residence in 2023. Our new residence can house 12 men at one time. We were very excited with this opportunity as the need for transitional housing continues to grow in Monroe County. Of course with this opportunity came more costs including hiring another house manager and paying another lease. CTC rents all of our residences and as everyone knows housing is very expensive in our community and as certified recovery residences we have very specific needs when looking at housing including the number of bedrooms, bathrooms, being on a bus line or within walking distance of downtown and other requirements as set out by INARR.

Rental scholarships have always played a big part in helping the residents of CTC. As mentioned in our application most folks come to us with very few finances and it takes a bit for them to get their bearing and find employment. Those first two weeks are very stressful and stress can often lead to relapse so making sure our residents don't also feel the stress of worrying about paying rent right off the bat is very important to us. Some residents do come to us with the means to pay the first two weeks of rent but need help at some other time during their stay because they lost their job, had wages cut or were behind on court fees. CTC never moves a resident out of our program because they are behind on their rent. We work with them to find help through other social service agencies, find different employment or provide them with a rental scholarship.

We can serve 41 folks at one time between our six residences. Folks come and go at different times in our program so during a year we could serve between 41 and 63 or more--it just depends on when folks came into our program, when they graduate our program or if they are terminated for breaking the contract or are sent back to court.

We started providing help upon graduation because folks were having a really hard time affording housing which means they stayed with CTC after graduation and after being ready to move on. This also means we had to turn folks away from our program until beds became available. So helping folks with a deposit or first months rent not only helps our graduates but also helps other folks who are waiting to move into our program.

The Wrap Around Rental Help Program directly helps our residents but also helps CTC as a whole because we pay our rent no matter if residents are behind on their rent. Two hundred and ninety dollars may seem like a small amount but it has a huge impact on our residents and they are always very grateful to receive this help without having to jump through a million hoops.

## 2024 Proposed Project Budget - Sample

Courage To Change Sober Living	Wrap-Around Rental Help		
\$17860			\$7820
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			\$7820
Smithville Foundation		\$2500	
City of Bloomington Downtown Outreach Grant		\$7540	
<b>TOTAL PROJECT FUNDS</b>	<b>17860</b>	<b>10040</b>	<b>\$7820</b>
<b>EXPENSES</b>			
Fresh Start Rental Scholarships	15260		5220
Graduate Rental Scholarships	2600		2600
<b>TOTAL PROJECT EXPENSES</b>	<b>17860</b>	<b>10040</b>	<b>\$7820</b>

# Courage to Change Sober Living

## Profit and Loss

July 2022 - June 2023

	TOTAL
Income	
Donation	2,814.82
Fundraising	207.62
Grants	
City of Bloomington Digital Equity	5,500.00
City of Bloomington Downtown Outreach Grant	4,800.00
Jack Hopkins Social Services	2,129.00
Michael Lindsay Foundation	15,000.00
Monroe County CARES	4,318.13
Perry Township	5,000.00
Sophia Travis	3,000.00
<b>Total Grants</b>	<b>39,747.13</b>
Recovery Works	104,372.88
Rental Income	45,572.60
<b>Total Income</b>	<b>\$192,715.05</b>
<b>GROSS PROFIT</b>	<b>\$192,715.05</b>
Expenses	
Advertising & Marketing	276.00
Ask My Accountant	107.78
Bank Charges & Fees	47.63
Car & Truck	30.00
Contractors	758.75
Fundraising Expenses	326.90
House Furnishings/supplies	2,165.17
House Supplies/Furniture	3,276.93
Insurance	13,755.63
Job Supplies	2,792.59
Legal & Professional Services	3,859.85
Meals & Entertainment	569.25
Office Supplies & Software	319.14
Other Business Expenses	216.33
Payroll Expenses	
Salaries & Wages	
Employees	55,200.00
<b>Total Salaries &amp; Wages</b>	<b>55,200.00</b>
Taxes	4,375.12
<b>Total Payroll Expenses</b>	<b>59,575.12</b>
Postage/Shipping	155.45
Reimbursable Expenses	646.00
Reimbursable Grant Expense	1,503.52
Rent & Lease	75,514.00
Repairs & Maintenance	930.00

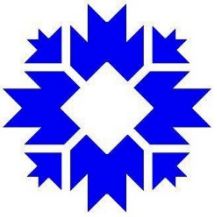
# Courage to Change Sober Living

## Profit and Loss

July 2022 - June 2023

	TOTAL
Supplies & Materials	72.15
Taxes & Licenses	312.45
Utilities	30,588.65
<b>Total Expenses</b>	<b>\$197,799.29</b>
NET OPERATING INCOME	<b>\$ -5,084.24</b>
Other Income	
Dividend Income	136.43
<b>Total Other Income</b>	<b>\$136.43</b>
NET OTHER INCOME	<b>\$136.43</b>
NET INCOME	<b>\$ -4,947.81</b>





**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** Cry of the Children, Inc.

**Address:**

540 South Curry Pike Bloomington, In 47403
---

**Phone:** 812-332-0610

**E-Mail:** cryofthechildren@gmail.

**Website:** cryofthechildren.org

**President of Board of Directors:** Dellsie Boddie

**Name of Executive Director:** Dellsie Boddie

**Phone:** 812 332 0610

**E-Mail:** cryofthechildren@gmail.com

**Name of Grant Writer:** Dellsie Boddie

**Phone:** 812 332 0610

**E-Mail:** cryofthechildren@gmail.com

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	38

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

To Encourage and Enrich youth with literacy and self-esteem deficits achieve confidence and life skills in order to be able to function in an ever changing society. Meeting the needs of the community with our Annual Thanksgiving Meal allowiing opportunity for service and volunteering, a time to make a difference.

## PROJECT INFORMATION

---

Name of the project to be funded:

Community Enrichment

Total cost of project: \$1,515.00

Requested amount of Jack Hopkins funding: \$1,515.00

Number of City residents to be served by this project in 2024: Bloomington

Number of clients to be served by this project in 2024: 150

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$1,515.00 for reading skilled books, reading games, math games, geography workbooks, backpacks and supplies to help prepare and expand youth in their academic growth and success. For the Annual Thanksgiving Meal we are asking for plates, cups, table settings, turkeys, potatoes, oyster dressing, green beans, rolls, dressing, gravy, cranberry sauce, and deserts. To continue to allow us to feed the homeless and serve them accordingly.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

Youth program located at 1111 W T12th St,  
Bloomington, In 47403  
Thanksgiving Meal 321 N Rogers St Bloomington,  
Indiana 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**If the property zoned for your intended use?**

Yes

No

N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

None

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Februray 2025

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

None

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

In-kind contribution.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Reading skilled Books	\$75.00
Priority #2	Reading Games	\$28.00
Priority #3	Math Games	\$48.00
Priority #4	Geography Educational Games	\$71.00
Priority #5	Thanksgiving Meal	\$150.00
Priority #6	Back Packs and Supplies	\$1,143.00
Priority #7		
<b>Total Requested</b>		<b>1,515.00</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

1. An increased rate of educational attainment among youth in Monroe County
2. A decreased rate of youth who drop out of high school
3. Increased graduation rate
4. increased knowledge and skills that enable youth to make healthy choices and decision in their lives
5. Provide a warm meal at the Thanksgiving Meal
6. Handing out hand warmers, gloves, home made winter hats and scarves
7. Providing those going into their new residents with items they need.

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

To encourage and enrich youth with literacy and self-esteem deficits achieve confidence and life skills in order to be able to function in an ever changing society. Meeting the needs of the community with our Annual Thanksgiving Meal allowing opportunity to feed, serve and volunteer, a time to make a difference.



**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Youth will be able to receive the resources they need in reading, math and other educational programming that will build their self-esteem in finding out they are an important person that is needed in our community. They will be able to seek and find their power and we will be reading about their wonderful accomplishments in our community as they continue to make good choices and are able to give back to our society.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

The tool we will use Linear/ Bar Graph. Based off of Site words, reading logs, create a reading spread sheet monthly. Showing reading growth of youth learners. After the Thanksgiving Meal we continue to reach out to Wheeler mission in donations in food and clothing. So that those that attended the dinner can continue to receive resources.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

In the works of Cry of The Children, Inc., We have shown the results of the young peoples accomplishments in high school graduation and furthering their education in the fields of nursing, teaching, mental health therapist, youth organization, government worker, physical therapist, and a grant coordinator.

The Cry of The Children, Inc. Annual Thanksgiving Meal has lead the homeless and volunteers to becoming independent and start serving in the community. Having volunteers from all walks of life from Chiropractors, Doctors, Lawyers, MCCSC administrators, IU administrators, students and staff, Tri-North Basketball team, Financial Advisors, Disc jockey's, The masons, Water donations from Marsh and for clean water for flint, Graduation Bible fellowship group from the Midwest to southeast region, Professors, and IU students, Local high school students, friends and family. Past years of location of the dinner salvation army and local churches.

The ability to help and serve has allowed those involved to have a sense of purpose in helping those in need with a cheerful heart with a non for profit they can count on to deliver. Cry of the Children is grateful for those that continue to support and serve this necessary program for the betterment of all here locally and where there is a need.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 19 2014**

CRY OF THE CHILDREN INCORPORATED  
C/O DELLSIE M BODDIE  
540 S CURRY PIKE  
BLOOMINGTON, IN 47403-1944

Employer Identification Number:  
36-4513896  
DLN:  
17053199325014  
Contact Person: ID# 31954  
CUSTOMER SERVICE  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
May 15, 2013  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

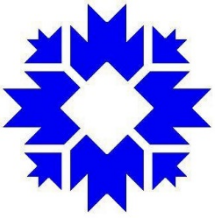
For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,



Director, Exempt Organizations

Letter 947



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** Dental Care Action Inc. (Dental Care Center)

**Address:**

646/648 S. Walker Street Bloomington, IN 47401
---

**Phone:** (812) 339 - 7700

**E-Mail:** info@dentalcarecenterbloomington.org

**Website:** dentalcarecenterbloomington.org

**President of Board of Directors:** Dr. Carl Briggs

**Name of Executive Director:** Dr. Carl Briggs

**Phone:** (812) 219 - 2233

**E-Mail:** briggsc@indiana.edu

**Name of Grant Writer:** Dr. Sarah A. Robinson

**Phone:** (812) 369 - 1524

**E-Mail:** sarahama@gmail.com

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	4	11

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Dental Care Action, established as a 501(c)(3) since 1980, provides dental care (teeth health and repair, teeth extraction, and dentures as needed), and dental health education for low- and no-income residents of Bloomington and surrounding communities in the hopes of reaching the medically underserved, regardless of ability to pay.

This organization aims to ease access to dental care and improve lives. Our associated dental care facility provides an emotionally safe and handicap accessible environment for dental care. We work especially close with Bloomington shelters as well as facilities serving elderly community members to address special needs that arise around communications, individual circumstances, and the coordination of transportation.

# PROJECT INFORMATION

---

Name of the project to be funded:

Technology Improvement in Support of Vulnerable and Underserved Population's Access to Dental Care

Total cost of project: \$20,995.99

Requested amount of Jack Hopkins funding: \$17,995.99

Number of City residents to be served by this project in 2024: 1,750

Number of clients to be served by this project in 2024: 2,400

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Dental Care Action, Inc. respectfully requests \$17,995.99 for computer technology equipment essential to the continuation of our dental services serving vulnerable and low- and no-income community members, and an Air Water Separator that affects equipment function and longevity as well as air quality within our dental center. Our 10-12-year-old computers are at risk of failure and are unable to support a new operating system soon required by our Dentrix software used for x-rays, billing, and patient records.

Two volunteer board members will be responsible for ordering equipment (June 2024) and managing the installation of equipment. (Completed by August 2024)

This technology update would provide the support that the Dental Care Center needs to assure that low- and no- income individuals have continued access to dental care that affects their health and well-being. More than 90% of our patients depend on Medicaid to fund their dental care. We have also helped no-income patients as well. Residents of Bloomington and the surrounding area that are a vulnerable population, who have low incomes, and/or are elderly are especially at risk of not attaining the care they need without our support.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

646/648 S. Walker Street  
Bloomington, Indiana 47403

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A



# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Delta Dental Community Mini Grant: Application due June 30, 2024. We hope that other grant funds might cover additional costs of up to \$3,000 but are prepared to cover these costs ourselves.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

This is a one-time investment for computer technology and one equipment item. Equipment will be ordered within two weeks time, with delivery and installments to take place in the eight weeks thereafter. We expect to submit 3-4 claims with a complete drawdown of funds submitted by September 1, 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

The Dental Care Center will cover the costs (estimated \$1,000) for installing the Air Water Separator. The Dental Care Center will fund additional costs of \$2,000 that may arise from unexpected installment costs or lost revenue during the time computers will be down for upgrades.

Two board member volunteers will oversee the project from start to finish.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	7 Dell Optiplex 7010 Small Form Factor Desktops	<b>\$5,943.00</b>
Priority #2	1 Intel Core i9-13900K Raptor Lake 24-Core Server	<b>\$2,892.00</b>
Priority #3	Microsoft Windows Server 2022 License- 24 cores	<b>\$1,399.00</b>
Priority #4	Windows Server 2022 CAL - 10 Device package	<b>\$ 699.00</b>
Priority #5	30-45 hours installation of computer software & technology	<b>\$4,990.00</b>
Priority #6	<b>1 Air Water Separator</b>	<b>\$1,356.99</b>
Priority #7	4 Dell 27" monitors	\$ 716.00
<b>Total Requested</b>		<b>\$17,995.99</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Our project addresses Healthy Community dental care needs for adults and seniors who have limited access to dental care due to no insurance, low- and no-income or other circumstances. We serve the pregnant, aged, blind, homeless, and disabled, among others where a serious shortage of dentists accepting Medicaid arises (Bloomington/VIM study, January 2018).

Community members often have dental conditions that can be health or life threatening and/or may result in missed work, negative social experiences, and poor employment status. Scarce resources and Medicaid's lack of coverage for certain dental issues can leave people in unnecessary pain and worsening dental and health issues. Dental infections, left unattended, can affect brain health. Gum disease leads to lost teeth and oral cancer. Without timely preventative measures for dental concerns, larger and more expensive health issues arise.

At one shelter, a serious tooth related abscess turned into an emergency room visit. Another found employment difficult without their front teeth that Medicaid does not cover. Overall, dental related health issues and poor self-image due to missing and/or poor teeth are likely to affect an individual's daily quality of life. This project helps assure continued access to dental care for our vulnerable and underserved populations.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This funding request is a one-time investment to purchase essential computer technology and an air quality mechanism to aid the Dental Care Center's ability to provide quality care to low-and no-income patients for many years to come.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Support of the Dental Care Center better assures continued access to dental care for low- and no-income patients and those dependent on Medicaid. Almost daily, we receive calls from patients who cannot find a dentist who takes Medicaid.

Our Bloomington location and relationships with community organizations and facilities further supports access to care. We are adept at coordinating with shelters, elderly facilities, and handicap caretakers to address special needs, including transportation. This helps vulnerable populations and the elderly who depend on family and facilities to provide transportation. Patients requiring multiple visits reinforces the importance of access to a local dentist. .

According to CDC (Centers for Disease Control and Prevention) study (2017-2020), 13.2% of adults aged sixty-five and older have complete tooth loss. This statistic may be higher among low-and no-income patients who have delayed treatment because of inability to pay. Our on-site denture lab (added June 2024) enables accessible quality dentures for those in need. Many patients otherwise could not afford it or would find it difficult (due to work schedules or being frail and elderly) to travel a distance from Bloomington multiple times. We aim to provide care that is compassionate and supportive individuals regardless of their life circumstances.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Key outcome indicators to measure the success of this project are focused on dental care access statistics as follows:

1. Number of individuals seen by the Dental Care Center as categorized by location/zip code; a) Bloomington city limits including Ellettsville, b) up to 30 miles from Bloomington, and c) over 30 miles from Bloomington.
2. Number of individuals seen by the Dental Care Center categorized by age (13-16, 17-30, 31-50, 51 and older).
3. Insurance type or noninsurance status
4. Types of service (e.g., exam, restoration, extraction, dentures/partial).

## OTHER COMMENTS *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Our dental center has taken steps to assure our continued success but is asking for your help in aiding our abilities to serve Bloomington and local communities. Steps that we have already taken to continue our services, ongoing for over 40 years, include the following:

- a. Installation of an in-house denture lab, July 2023. This allowed for a consistent margin of funds above costs covered by Medicaid. Previously, reimbursements from Medicaid often did not cover the costs to us considering the high costs associated with ordering dentures from outside sources.
- b. Beginning January 2024, two board member volunteers have taken on the responsibility of managing daily operations of the center including, e.g., product orders, staff management, and policy. This provides substantial cost savings and strong management.
- c. Board members have reviewed line items in the budget for cost savings while maintaining quality patient care. (E.g., canceling automated text notices to patients.)
- d. As of January 2024, a board member volunteers weekly (average 20 hours) in place of our hiring an additional, part time, front desk person. We hope to hire a part-time additional employee when we are fiscally ready for this.
- e. Board members volunteer to provide building maintenance that does not require certified experts. The condition of our facility is very good but requires occasional work such as refreshing the paint or rug cleaning.
- f. We are excited to see that we will soon hire a part-time second dentist, in addition to our full-time dentist, to aid the increased demands for dental care that we have been experiencing. This addition will also strengthen our bottom line.

**2024 Proposed Project Budget**

Dental Care Action Inc.	Technological Improvement in Support of Vulnerable and Underserved Population’s Access to Dental Care
<b>Total Project Cost:</b>	<b>\$20,995.99</b>

	<b>Totals</b>	<b>Other Income Sources</b>	<b>JHSS GRANT</b>
<b>FUNDS</b>			
Dental Care Center		3,000.00	
<b>TOTAL PROJECT FUNDS</b>	<b>20,995.99</b>	<b>3,000.00</b>	<b>17,995.99</b>

<b>EXPENSES</b>			
Computer Technology			11,649.00
Computer Technology Labor Cost (30-40 hours)			4,990.00
Air quality equipment			1,356.99
Lost production revenue		2,000.00 (estimate)	
Installation of air quality equipment (1 hour – Henry Shine labor, 1-2 hrs. plumber, labor to install vent to exterior)		1,000.00 (estimate)	
Project management for computer & air quality installation		0 (donated time by board members)	
<b>TOTAL PROJECT EXPENSES</b>	<b>20,995.99</b>	<b>3,000</b>	<b>17,995.99</b>



2626 East 10th Street  
 Bloomington, IN 47408  
 (812) 333-4972

# Estimate

Date	Estimate #
3/28/24	136

Name / Address
Dental Care Action Inc. 646 S. Walker St. Bloomington, IN 47403

Rep
MS

Description	Qty	Cost	Total
Dell 27" Monitor with 1 x HDMI and 1 x DisplayPort 1.2 ports and Full HD (1080p) 1920 x 1080 at 75 Hz.. (Height, Pivot (rotation), Swivel and Tilt). Comes with a 3 Year Overnight Advanced Exchange Warranty.	4	179.00	716.00

<p>Most hardware is warranted for 30 days excluding custom order parts, refurbished and used hardware by The Computer Clinic, herein referred to as ("TCC"), unless specified in the description field of this receipt. After 30 days, it is the responsibility of the customer to contact the manufacturer to receive a replacement or the customer can contact TCC for assistance in replacing the product (shipping &amp; labor cost will apply). Custom ordered parts require 1/2 down before ordering unless specified otherwise. Products sold not listed below are covered under our 24-hr. return period, unless stated otherwise. A 20% restocking fee applies to all refunds. Non-refundable products include computer systems, new and used, monitors, custom ordered parts and sale items. The customer has requested the provision of services and/or products from TCC then payment in full is due at the time of service unless otherwise agreed between the customer and TCC. In the event that payment is not made in full or there is an agreement for payments, the customer agrees that the entire balance due for services and products provided shall be paid no later than thirty (30) days from the date of service and/or sale. In the event that the customer does not pay the balance as agreed, and TCC must take action to collect the balance due from the customer, the customer agrees that they will be responsible for any costs of collection, prejudgment interest at the rate of 1.5% per month on any unpaid balance, court costs, attorney's fees and expenses.</p>		
	<b>Subtotal</b>	\$716.00
	<b>Sales Tax (0.0%)</b>	\$0.00
	<b>Total</b>	\$716.00



2626 East 10th Street  
 Bloomington, IN 47408  
 (812) 333-4972

# Estimate

Date	Estimate #
3/28/24	134

Name / Address
Dental Care Action Inc. 646 S. Walker St. Bloomington, IN 47403

Rep
MS

Description	Qty	Cost	Total
Intel Core i9-13900K - Core i9 13th Gen Raptor Lake 24-Core (8P+16E) P-core Base Frequency: 3.0 GHz E-core Base Frequency: 2.2 GHz LGA 1700 125W Intel UHD Graphics 770 Desktop Processor.	1	2,892.00	2,892.00
ASUS ROG Strix Z790-E Gaming WiFi 6E LGA 1700(Intel 14th & 12th&13th Gen)ATX gaming motherboard(PCIe 5.0, DDR5,18+1 power stages,2.5 Gb LAN, Bluetooth v5.2,Thunderbolt 4,support up to 5xM.2,1xPCIe 5.0 M.2,Front panel USB 3.2 Gen 2x2 Type-C - ATX High-End Desktop Motherboard..	1	0.00	0.00
CORSAIR VENGEANCE DDR5 RAM 64GB (2x32GB) 6400MHz CL40 AMD EXPO iCUE Compatible Computer Memory - Gray - Desktop Memory.	1	0.00	0.00
DeepCool AK620 Zero Dark CPU Air Cooler Mighty 260w TDP ALL-Black 6 Copper Heat Pipes Dual-Tower CPU Cooler with120MM Fans - High Performance Desktop Processor Heatsink.	1	0.00	0.00
Western Digital Black 500GB NVMe Internal High-End Solid State Drive - Gen4 PCIe, M.2 2280. Raid 1 -Mirror.	2	0.00	0.00
Western Digital Black 10TB High-End Internal Hard Drive HDD - 7200 RPM, 256MB Cache, SATA 6 Gb/s, 3.5". Raid 1 - Mirror.	2	0.00	0.00
Corsair RM750e Fully Modular Low-Noise - ATX 3.0 & PCIe 5.0 Compliant - 105°C-Rated Capacitors - 80 PLUS Gold Efficiency Desktop Power Supply.	1	0.00	0.00
Corsair 4000D Airflow Tempered Glass Mid-Tower ATX PC Case - Black.	1	0.00	0.00
MSI GT730 - 64-Bit Dual-Link DVI-D/HDMI NVIDIA GeForce Low Profile Graphics Card.	1	0.00	0.00
Custom Built Intel 24-Core High End Desktop Server Computer.			2,892.00
Microsoft Windows Server 2022 Standard - License - 24 cores.	1	1,399.00	1,399.00
Windows Server 2022 CAL - 10 Devices.	1	699.00	699.00

<p>Most hardware is warranted for 30 days excluding custom order parts, refurbished and used hardware by The Computer Clinic, herein referred to as ("TCC"), unless specified in the description field of this receipt. After 30 days, it is the responsibility of the customer to contact the manufacturer to receive a replacement or the customer can contact TCC for assistance in replacing the product (shipping &amp; labor cost will apply). Custom ordered parts require 1/2 down before ordering unless specified otherwise. Products sold not listed below are covered under our 24-hr. return period, unless stated otherwise. A 20% restocking fee applies to all refunds. Non-refundable products include computer systems, new and used, monitors, custom ordered parts and sale items. The customer has requested the provision of services and/or products from TCC then payment in full is due at the time of service unless otherwise agreed between the customer and TCC. In the event that payment is not made in full or there is an agreement for payments, the customer agrees that the entire balance due for services and products provided shall be paid no later than thirty (30) days from the date of service and/or sale. In the event that the customer does not pay the balance as agreed, and TCC must take action to collect the balance due from the customer, the customer agrees that they will be responsible for any costs of collection, prejudgment interest at the rate of 1.5% per month on any unpaid balance, court costs, attorney's fees and expenses.</p>	
	<b>Subtotal</b>
	<b>Sales Tax (0.0%)</b>
	<b>Total</b>





2626 East 10th Street  
 Bloomington, IN 47408  
 (812) 333-4972

# Estimate

Date	Estimate #
3/28/24	134

Name / Address
Dental Care Action Inc. 646 S. Walker St. Bloomington, IN 47403

Rep
MS

Description	Qty	Cost	Total
<p>Estimate of 30 to 45 hours at \$149.00\hr. to install the server and computers, connect the workstations to the new server, move over customer data from old the old computers to the new ones and setup the Dental Software.*This is an estimate which is only good for 30 days and after that time, prices and components can change. The new server will have the newest Windows Server version 2022 (24-Core) which is more compatible with Windows 11 and will be supported at the moment until Oct. 2031. This date has changed from Jan. 2031 to Oct. 2031 and could change again.</p> <p>*The estimate above is an estimate which could be higher or lower on labor and is not added to the total at the bottom of this page. I always do what I can to keep the labor as low as possible but this is all depending on a lot of factors (for example, the time it will take to move the old data from the old server to the new one, moving over profiles, setting up software and the Dental Software on the new server, etc.) .</p>			
<p>Most hardware is warranted for 30 days excluding custom order parts, refurbished and used hardware by The Computer Clinic, herein referred to as ("TCC"), unless specified in the description field of this receipt. After 30 days, it is the responsibility of the customer to contact the manufacturer to receive a replacement or the customer can contact TCC for assistance in replacing the product (shipping &amp; labor cost will apply). Custom ordered parts require 1/2 down before ordering unless specified otherwise. Products sold not listed below are covered under our 24-hr. return period, unless stated otherwise. A 20% restocking fee applies to all refunds. Non-refundable products include computer systems, new and used, monitors, custom ordered parts and sale items. The customer has requested the provision of services and/or products from TCC then payment in full is due at the time of service unless otherwise agreed between the customer and TCC. In the event that payment is not made in full or there is an agreement for payments, the customer agrees that the entire balance due for services and products provided shall be paid no later than thirty (30) days from the date of service and/or sale. In the event that the customer does not pay the balance as agreed, and TCC must take action to collect the balance due from the customer, the customer agrees that they will be responsible for any costs of collection, prejudgment interest at the rate of 1.5% per month on any unpaid balance, court costs, attorney's fees and expenses.</p>	<b>Subtotal</b>		\$4,990.00
	<b>Sales Tax (0.0%)</b>		\$0.00
	<b>Total</b>		\$4,990.00



2626 East 10th Street  
 Bloomington, IN 47408  
 (812) 333-4972

# Estimate

Date	Estimate #
3/28/24	132

Name / Address
Dental Care Action Inc. 646 S. Walker St. Bloomington, IN 47403

Rep
MS

Description	Qty	Cost	Total
(New) Dell Optiplex 7010 Small Form Factor Desktop Intel Core i5-13500 @ 2.5GHz up to 4.8GHz 8GB Memory 256GB NVMe SSD Intel Graphics Front Ports: (2 x USB 2.0) - (2 x 2 USB 3.2 Gen. 1 Ports) - Universal Audio Port Rear Ports: (1 x DisplayPort 1.4a) - (1 x HDMI 1.4b) - (2 x USB 3.2 Gen 1) - (2 x USB 2.0 ports with Smart Power On) - (1 x Ethernet Port 10/100/1000 Mbps) No DVDRW Drive and No Wireless Windows 11 Professional Edition Comes with a 5 Year ProSupport Next Business Day Warranty.	7	849.00	5,943.00

<p>Most hardware is warranted for 30 days excluding custom order parts, refurbished and used hardware by The Computer Clinic, herein referred to as ("TCC"), unless specified in the description field of this receipt. After 30 days, it is the responsibility of the customer to contact the manufacturer to receive a replacement or the customer can contact TCC for assistance in replacing the product (shipping &amp; labor cost will apply). Custom ordered parts require 1/2 down before ordering unless specified otherwise. Products sold not listed below are covered under our 24-hr. return period, unless stated otherwise. A 20% restocking fee applies to all refunds. Non-refundable products include computer systems, new and used, monitors, custom ordered parts and sale items. The customer has requested the provision of services and/or products from TCC then payment in full is due at the time of service unless otherwise agreed between the customer and TCC. In the event that payment is not made in full or there is an agreement for payments, the customer agrees that the entire balance due for services and products provided shall be paid no later than thirty (30) days from the date of service and/or sale. In the event that the customer does not pay the balance as agreed, and TCC must take action to collect the balance due from the customer, the customer agrees that they will be responsible for any costs of collection, prejudgment interest at the rate of 1.5% per month on any unpaid balance, court costs, attorney's fees and expenses.</p>		
	<b>Subtotal</b>	\$5,943.00
	<b>Sales Tax (0.0%)</b>	\$0.00
	<b>Total</b>	\$5,943.00

# Parts quote for Dental Care of Monroe Cnty JDE#193023



**Beltran, John** <[John.Beltran@henryschein.com](mailto:John.Beltran@henryschein.com)>

8:39 AM (1  
hour ago)

to me, Mike

Good morning, Sarah.

The retail price for the Air Water Separator, Air Techniques item #55540, is \$1356.99. Parts Warehouse also has a more generic Air Water separator, #S-1388, that retails for \$351.06. Either one would require approximately 1 hour of labor. The arrival fee of \$45.00 and your labor rate is \$456.95 for the first hour would be \$501.95. Any labor after the first hour would be billed at \$102.81/15minutes. A plumber would also be needed to run the vent piping and make the final connections to the drain. Please reach out if you need any additional information.

Sincerely,  
John

John d Beltran  
Henry Schein Dental EST  
[John.beltran@Henry Schein.com](mailto:John.beltran@HenrySchein.com)



# Dental Care Action, Inc.

## Balance Sheet

As of December 31, 2023

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
CHASE-Plat Bus Cking (0883)	4,829.55
Owen Co Checking (8179)	41,981.08
Petty Cash	50.00
<b>Total Bank Accounts</b>	<b>\$46,860.63</b>
Accounts Receivable	
Accounts Receivable (A/R)	66,696.18
<b>Total Accounts Receivable</b>	<b>\$66,696.18</b>
<b>Total Current Assets</b>	<b>\$113,556.81</b>
Fixed Assets	
Accumulated Deprecation	-30,949.49
Buildings	556,934.53
Land	84,764.00
<b>Total Fixed Assets</b>	<b>\$610,749.04</b>
<b>TOTAL ASSETS</b>	<b>\$724,305.85</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Other Current Liabilities	
Health Insurance Payroll Liabilities	763.98
Owen Co Bank LOC # 2811	36,617.90
<b>Total Other Current Liabilities</b>	<b>\$37,381.88</b>
<b>Total Current Liabilities</b>	<b>\$37,381.88</b>
<b>Total Liabilities</b>	<b>\$37,381.88</b>
Equity	
Retained Earnings	727,068.69
Net Income	-40,144.72
<b>Total Equity</b>	<b>\$686,923.97</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$724,305.85</b>

### Note

No assurance provided on these financial statements.

# Dental Care Action, Inc.

## Profit and Loss

January - December 2023

	TOTAL
Income	
Accounts Receivable Adjustment	2,467.47
Dental Services	
Insurance Receipts	343,960.31
Patient	67,027.71
<b>Total Dental Services</b>	<b>410,988.02</b>
Grant Income	
Reimbursable Jack Hopkins Grant	3,940.71
Tri-Kappa Grant	6,850.00
<b>Total Grant Income</b>	<b>10,790.71</b>
Other Income	
Donations	821.83
Fundraiser Income	2,659.61
<b>Total Other Income</b>	<b>3,481.44</b>
<b>Total Income</b>	<b>\$427,727.64</b>
Cost of Goods Sold	
Cost of Goods Sold	
Dental Lab	29,573.55
Dental Supplies	41,321.62
<b>Total Cost of Goods Sold</b>	<b>70,895.17</b>
<b>Total Cost of Goods Sold</b>	<b>\$70,895.17</b>
<b>GROSS PROFIT</b>	<b>\$356,832.47</b>
Expenses	
Advertising & Marketing	769.66
Bank Charges & Fees	2,028.56
Credit Card Processing Fees	2,335.86
<b>Total Bank Charges &amp; Fees</b>	<b>4,364.42</b>
Contractors	1,400.00
Dentist	32,851.15
<b>Total Contractors</b>	<b>34,251.15</b>
Dues & subscriptions	240.00
Fundraiser Expenses	1,203.27
Insurance	9,599.41
Interest Paid	1,334.22

# Dental Care Action, Inc.

## Profit and Loss

January - December 2023

	TOTAL
Legal & Professional Services	750.00
Accounting Services	8,307.50
AR Collections Services	24,503.19
Information Technology Services	8,195.97
<b>Total Legal &amp; Professional Services</b>	<b>41,756.66</b>
Office Supplies & Software	8,621.67
Cleaning Supplies	77.20
Postage (deleted)	61.61
Software Subscription (deleted)	303.68
Hsps Dentrax Credit Card Process Fee (deleted)	5,510.02
<b>Total Software Subscription (deleted)</b>	<b>5,813.70</b>
<b>Total Office Supplies &amp; Software</b>	<b>14,574.18</b>
Other Business Expenses	1,779.79
Board Stipend	140.00
Condominium Fees	1,652.00
<b>Total Other Business Expenses</b>	<b>3,571.79</b>
Owner Association Dues	7,837.70
Payroll Expenses	
Payroll Processing Services	1,427.69
Payroll Taxes	28,789.47
Salaries & Wages	364,686.95
<b>Total Payroll Expenses</b>	<b>394,904.11</b>
Property Taxes	3,006.68
Rent & Lease	1,290.50
Repairs & Maintenance	4,399.69
Pest Control Services	64.00
<b>Total Repairs &amp; Maintenance</b>	<b>4,463.69</b>
Utilities	
Electricity	4,560.65
Gas	1,121.22
Internet and Phone	2,546.19
Water / Sewer	1,247.79
<b>Total Utilities</b>	<b>9,475.85</b>
<b>Total Expenses</b>	<b>\$532,643.29</b>
NET OPERATING INCOME	<b>\$ -175,810.82</b>
Other Income	
ERTC Income	21,577.75
Interest Income	2,314.13
Raymond James - Dividend Income	15.60
<b>Total Other Income</b>	<b>\$23,907.48</b>

# Dental Care Action, Inc.

## Profit and Loss

January - December 2023

	TOTAL
Other Expenses	
Depreciation	13,102.14
<b>Total Other Expenses</b>	<b>\$13,102.14</b>
NET OTHER INCOME	<b>\$10,805.34</b>
NET INCOME	<b>\$ -165,005.48</b>

### Note

No assurance provided on these financial statements.



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

---

**Lead Agency Name:** Exodus Refugee Immigration

**Address:**

1401 S. Walnut St. Bloomington, IN 47401
---

**Phone:** 317-601-6280

**E-Mail:** eaquino@exodusrefugee.org

**Website:** <https://www.exodusrefugee.org/>

**President of Board of Directors:** Marina Hadjioannou Waters

**Name of Executive Director:** Erin Aquino

**Phone:** 317-601-6280

**E-Mail:** eaquino@exodusrefugee.org

**Name of Grant Writer:** Matt Calvert

**Phone:** 317-531-1838

**E-Mail:** mcalvert@exodusrefugee.org



## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
10	0	50

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Exodus Refugee Immigration is dedicated to the protection of human rights by serving the resettlement needs of refugees and other displaced people fleeing persecution, injustice, and war by welcoming them to Indiana.

# PROJECT INFORMATION

---

Name of the project to be funded:

Emergency Assistance Program

Total cost of project: \$175,000

Requested amount of Jack Hopkins funding: \$15,000

Number of City residents to be served by this project in 2024: 100 for total project

Number of clients to be served by this project in 2024: 100 for total project

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Exodus Refugee Immigration kindly requests \$15,000 to support emergency housing assistance (Airbnb, extended stay hotels, rent, etc.) and associated basic needs, such as food, for newly arriving refugees. The Emergency Assistance Program assists refugees resettled in Bloomington, who are struggling to meet their basic needs, such as housing and food, while working toward self-sufficiency and supporting their families.

This funding is particularly critical, given rapidly rising rental costs, a lack of rental availability in the Bloomington area, and the arrival of clients with little to no notice to the agency. Grant funding will allow recipients of emergency assistance to achieve a measure of security and focus on larger self-sufficiency goals, such as obtaining employment, learning English, or enrolling in higher education.

A grant from the Jack Hopkins Social Services Fund would help Exodus provide housing and basic needs support for 15 refugees during the grant period.

# COLLABORATIVE PROJECTS

---

Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

N/A

How do your missions, operations and services complement each other?

N/A

What is the existing relationship between agencies?

N/A

How will communication and coordination change as a result of the project?

N/A

Explain any challenges and steps you plan to take to address those challenges.

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

The project will be housed at Exodus's Bloomington office:  
1401 S. Walnut St.  
Bloomington, IN  
47401

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

The following describes the other confirmed and potential sources of support for refugee emergency assistance in 2024: (1) individual donors - \$35,000 confirmed; (2) Anonymous Foundation - \$100,000 potential; and (3) future grants – \$25,000 potential.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Exodus requests a full upfront payment of the \$15,000 for immediate use for emergency assistance to aid refugee clients. If the \$15,000 cannot be paid in full at the start of the grant, Exodus requests to submit bi-weekly claims for reimbursement.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Emergency assistance is an ongoing project that depends on funding from foundations, individuals, government entities, and corporate donations. Funding is continually pursued and, if awarded, used quickly on individuals in need.

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Exodus will leverage the following to support Bloomington sub-office:

1. Private grant funding and individual donations – to support personnel, resources, and services needed.
2. Volunteers – to provide support to newly arrived refugees.
3. Donations – to furnish homes for newly arrived refugees.
4. Community Stakeholders – The Bloomington sub-office benefits from the decades' long experience of the main office in Indianapolis. Additionally, the Bloomington sub-office has thus far engaged and consulted with over 100 partners since opening, including the Mayor of Bloomington, the city's Director of Engagement, the Monroe County Community School Corporation, public safety, and more to ensure that Exodus' impact and effectiveness are strong.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Emergency rent and basic needs assistance	\$15,000
Priority #2		
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		\$15,000

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

For refugee newcomers, transition to life in the United States can be profoundly difficult and disorienting. They arrive with few material possessions and limited financial resources and face inevitable barriers to achieving self-supporting lives.

In Bloomington (and the country as a whole), rent costs have risen considerably and availability has shrunk. The issues caused by the lack of affordable and available housing are further compounded by the fact that Exodus often receives only a two-week (or less) notice of a refugee family's arrival to Bloomington. Accordingly, Exodus is forced to place newly arriving families in temporary housing, such as extended-stay hotels or Airbnbs, until permanent housing can be secured.

Additionally, food costs have skyrocketed, while Supplemental Nutrition Assistance Program benefits have not increased. And the Division of Family Resources is experiencing significant delays in processing such benefits.

Unfortunately, while these costs continue to rise, the initial limited federal assistance refugees receive through the Refugee Resettlement Program has not increased. Specifically, when arriving in the U.S., each refugee is provided a one-time amount of \$1,375 per person to cover basic expenses. Without housing and food security, Exodus clients face immeasurable challenges to achieving their ultimate goals of self-sufficiency.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

For 43 years, Exodus has had a strong record of sustaining its programs. Exodus attributes this to its adaptability, leadership and board, and ability to achieve greater cost-efficiency through difficult economic times.

To ensure Exodus can assist refugees meet their basic needs and ultimately reach self-sufficiency, Exodus will seek support from individuals, foundations, corporations, faith-based organizations, and other private sources. Exodus will build upon its prior fundraising successes and is informed by a comprehensive fundraising audit and plan.

Additionally, Exodus's Board of Directors is committed to the financial well-being of the organization and has a Development and Community Engagement Committee.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Funding from the Jack Hopkins grant will allow Exodus to provide emergency assistance to refugees while they receive critical training and support from other Exodus programming, such as case management, employment services, English language classes, etc.

This leads to wide positive community impact. Refugees end up as vital members of their local communities – they join the work force, pay taxes, open businesses, and buy houses. For example, a study has shown that refugees have an entrepreneurship rate that outshines that of their U.S.-born counterparts (13% versus 9%); have a higher percentage who are working age compared to the U.S.-born population (77.1% versus 49.7%); and contribute billions in taxes (20.9 billion). *New American Economy From Struggle to Resilience: The Economic Impact of Refugees in America* (June 2017). In other words, integrating the agency's clients into their communities leads to a mutually beneficial economic relationship between the two.

But successful integration of the agency's clients doesn't just lead to an economic boost within their new communities. Refugees introduce their new cities to new cultures, arts, and cuisines, leading to more social diversity that is not as easily quantifiable (yet, is as equally important).

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Exodus will use the following outcomes to measure success of the program: # of clients who access long-term affordable housing and can more easily pursue their self-sufficiency goals and # of clients who access food and can more easily pursue their self-sufficiency goals. To measure the impact of the assistance, Exodus will use individual assessments, an established method, to evaluate program outcomes. Individual assessments, which may be conducted either verbally or in written format, will allow staff to assess if clients who have been provided housing and food assistance have taken substantial steps in pursuing personal self-sufficiency goals.



## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Exodus serves refugees and other immigrants of humanitarian concern (Afghans evacuees, asylees, Cuban/Haitian entrants, asylum seekers, Special Immigrant Visa holders, and victims of human trafficking), hereinafter "refugees." All of these individuals have fled persecution or violence in their home country and sought safety in the U.S. Our primary goal is to offer a warm welcome and provide the services and support they need to rebuild their lives in Indiana. The agency resettles individuals and families representing many faiths and nationalities including individuals from Afghanistan, Burma, Central African Republic, the Democratic Republic of the Congo, El Salvador, Eritrea, Ethiopia, Guatemala, Haiti, Iraq, Somalia, Sudan, and Syria.

Exodus's programming and services advance the quality of life for its clients by providing the necessary assistance to ensure they can become self-sufficient and integrated and active members of their new communities. The agency takes a holistic approach to each client, noting that each individual presents different challenges. Individuals are accordingly enrolled in programs and services that best meet their needs.

Additionally, through its programs and services, Exodus strives to ensure that its clients feel welcome, that their new communities accept them, and that they both learn from each other.

## 2024 Jack Hopkins Project Budget

<b>Exodus Refugee Immigration, Inc. - Bloomington</b>		<b>Emergency Assistance Program</b>	
<b>Total Project Cost</b>		<b>\$15,000</b>	
	Totals	Other Sources	JHSS Grant
<b>FUNDS</b>			
<b>JHSS Grant</b>	\$15,000		\$15,000
Anonymous Foundation Grant	\$100,000	\$100,000	
Individual Donors	\$35,000	\$35,000	
Future Foundation Grants	\$25,000	\$25,000	
<b>TOTAL PROJECT FUNDS FROM ALL SOURCES</b>	<b>\$175,000</b>	<b>\$160,000</b>	<b>\$15,000</b>
<b>EXPENSES</b>			
Emergency Assistance to cover certain expenses, such as rent & utilities food, childcare, medical expenses, work clothing, etc., while refugees work toward self-sufficiency.	\$175,000	\$160,000	\$15,000
<b>TOTAL PROJECT EXPENSES</b>	<b>\$175,000</b>	<b>\$160,000</b>	<b>\$15,000</b>

**Exodus Refugee Immigration**  
**Budget vs. Actuals: FY\_2023 - FY23 P&L**  
January - December 2023

	Total	
	Actual	Budget
<b>Income</b>		
4100 Federal Funding	4,447,427.89	4,112,639.00
4200 State Funding	2,432,412.07	2,747,730.00
<b>4300 Private Funding</b>		
4310 Grants/Foundations	1,527,100.00	334,000.00
4320 Corporate Funding	29,551.75	25,000.00
4330 Faith Groups	27,299.14	40,000.00
4340 Individuals	317,192.46	395,000.00
4341 T-Shirts (deleted)	1,705.24	1,000.00
<b>Total 4340 Individuals</b>	<b>\$ 318,897.70</b>	<b>\$ 396,000.00</b>
4355 Gala Proceeds	208,031.48	175,000.00
4360 Small Fundraising Events	724.50	
<b>Total 4300 Private Funding</b>	<b>\$ 2,111,604.57</b>	<b>\$ 970,000.00</b>
4400 Income - Misc.	63,168.66	19,000.00
4500 Income - Deferral Entries	-873,638.40	693,566.00
4600 Investment Return	38,286.09	
<b>Total Income</b>	<b>\$ 8,219,260.88</b>	<b>\$ 8,542,935.00</b>
<b>Gross Profit</b>	<b>\$ 8,219,260.88</b>	<b>\$ 8,542,935.00</b>
<b>Expenses</b>		
<b>5000 Compensation &amp; Benefits</b>		
5010 Salary Expense	3,671,723.19	4,052,421.00
5020 Payroll Taxes	277,587.20	329,612.00
5025 Workers Compensation	39,949.50	24,117.00
5030 Health Insurance/HRA	400,599.54	413,561.00
5035 Emp. Health Ins. Contribution	-100,641.63	-109,396.00
5040 401K Match	45,850.06	44,045.00
<b>Total 5000 Compensation &amp; Benefits</b>	<b>\$ 4,335,067.86</b>	<b>\$ 4,754,360.00</b>
<b>6000 Administration</b>		
<b>6100 Professional Fees &amp; Contractors</b>		
6110 Payroll/Auditor/Misc.	39,621.64	49,480.00
6120 IT/Website Labor	149,986.14	101,040.00
6140 Contracted Staff	84,435.00	87,610.00
6160 Business Insurance	25,414.69	23,130.00
<b>Total 6100 Professional Fees &amp; Contractors</b>	<b>\$ 299,457.47</b>	<b>\$ 261,260.00</b>
<b>6300 Occupancy</b>		
6310 Space Rental	168,739.13	137,100.00
6320 Cleaning, Recycling, Shredding	14,946.19	12,680.00
<b>Total 6300 Occupancy</b>	<b>\$ 183,685.32</b>	<b>\$ 149,780.00</b>

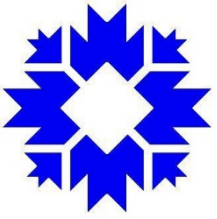
<b>6400 Supplies, Equip &amp; Furnishings</b>			
6410 Office Supplies	22,936.42		27,060.00
6420 Office Equipment & Furnishings	12,681.35		13,570.00
6430 Copier Expense	5,254.56		3,665.00
6450 Depreciation & Amort. Expense	29,513.78		27,168.00
6480 Interest Expenses	864.42		2,817.00
<b>Total 6400 Supplies, Equip &amp; Furnishings</b>	<b>\$ 71,250.53</b>	<b>\$</b>	<b>74,280.00</b>
<b>6500 Marketing/Development</b>	11,104.87		19,874.00
6510 Merchandise Costs	5,025.24		3,350.00
6515 Gala Expenses	59,163.03		52,841.00
6520 Credit Card Processing Fees	4,741.84		6,500.00
<b>Total 6500 Marketing/Development</b>	<b>\$ 80,034.98</b>	<b>\$</b>	<b>82,565.00</b>
<b>6600 Communications</b>			
6610 Phones/Internet	35,832.03		28,520.00
6620 Postage	2,392.95		3,030.00
<b>Total 6600 Communications</b>	<b>\$ 38,224.98</b>	<b>\$</b>	<b>31,550.00</b>
<b>6800 Trainings/Conferences</b>	24,645.17		24,700.00
<b>6900 Admin Other</b>			
6920 Bank Fees	476.49		1,000.00
6940 CEO Fund	235.38		1,000.00
6950 Board Expenses	1,045.92		500.00
6960 Admin Miscellaneous	18,757.44		45,010.00
<b>Total 6900 Admin Other</b>	<b>\$ 20,515.23</b>	<b>\$</b>	<b>47,510.00</b>
<b>Total 6000 Administration</b>	<b>\$ 717,813.68</b>	<b>\$</b>	<b>671,645.00</b>
<b>7000 Program Expenses</b>			
<b>7105 Basic Needs - Direct to Clients</b>			
7110 Direct Cash	382,031.13		514,000.00
7115 Rent	1,766,288.08		1,435,500.00
7120 Utilities	338,184.56		245,750.00
7125 Furnishings	234,495.76		94,632.00
7130 Food	113,313.51		75,000.00
7135 Clothing	11,756.47		9,250.00
7140 Medical/Health	15,174.67		6,950.00
7145 Basic Needs - Other	58,975.23		50,850.00
<b>Total 7105 Basic Needs - Direct to Clients</b>	<b>\$ 2,920,219.41</b>	<b>\$</b>	<b>2,431,932.00</b>
<b>7175 Basic Needs - Indirect</b>			
7180 Refugee Mileage/Transport	64,262.85		76,500.00
7181 Uber/Lyft/Taxi	93,753.71		88,500.00
7220 Bus Passes	20,560.00		12,050.00
<b>Total 7180 Refugee Mileage/Transport</b>	<b>\$ 178,576.56</b>	<b>\$</b>	<b>177,050.00</b>
7185 Interpretation	514,468.66		257,500.00
7190 Bulk Client Purchases	70,311.08		125,325.00
7195 Apartment Set Up Costs	14,345.48		6,000.00
7200 Client Postage	5,735.85		8,500.00
7205 Education Expense	74,071.59		63,900.00

<b>7210 Employment Expense</b>		8,074.59		9,450.00
<b>Total 7175 Basic Needs - Indirect</b>	<b>\$</b>	<b>865,583.81</b>	<b>\$</b>	<b>647,725.00</b>
<b>Total 7000 Program Expenses</b>	<b>\$</b>	<b>3,785,803.22</b>	<b>\$</b>	<b>3,079,657.00</b>
<b>Total Expenses</b>	<b>\$</b>	<b>8,838,684.76</b>	<b>\$</b>	<b>8,505,662.00</b>
<b>Net Operating Income</b>	<b>-\$</b>	<b>619,423.88</b>	<b>\$</b>	<b>37,273.00</b>
<b>Net Income</b>	<b>-\$</b>	<b>619,423.88</b>	<b>\$</b>	<b>37,273.00</b>

Monday, Jan 08, 2024 06:47:57 AM GMT-8 - Accrual Basis

**Exodus Refugee Immigration**  
**Balance Sheet**  
As of December 31, 2023

	Total
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1100 Petty Cash	3,609.00
1140 First Financial - Checking	0.00
1145 First Financial - MM	216,181.78
1150 First Financial - New Checking	147,786.31
<b>Total Bank Accounts</b>	<b>\$ 367,577.09</b>
<b>Accounts Receivable</b>	
1200 Accounts Receivable	2,036,211.48
<b>Total Accounts Receivable</b>	<b>\$ 2,036,211.48</b>
<b>Other Current Assets</b>	
12000 Undeposited Funds	0.00
1205 Pledges Receivable	150,000.00
1250 Prepaid Expense	55,578.64
1360 CDs	1,755,151.38
<b>Total Other Current Assets</b>	<b>\$ 1,960,730.02</b>
<b>Total Current Assets</b>	<b>\$ 4,364,518.59</b>
<b>Fixed Assets</b>	
1300 Property & Equipment	8,945.00
1310 Vehicles	34,999.00
1320 Other Property and Equipment	191,624.61
1330 Accumulated Depreciation	-127,612.00
1610 ROU Printer	18,074.13
<b>Total 1300 Property &amp; Equipment</b>	<b>\$ 126,030.74</b>
1600 ROU Office	726,784.55
<b>Total Fixed Assets</b>	<b>\$ 852,815.29</b>
<b>Other Assets</b>	
1350 Long-Term Investments	503,524.52
1500 Security Deposit	7,783.39
<b>Total Other Assets</b>	<b>\$ 511,307.91</b>
<b>TOTAL ASSETS</b>	<b>\$ 5,728,641.79</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Accounts Payable</b>	
Accounts Payable (A/P)	8,708.35
<b>Total Accounts Payable</b>	<b>\$ 8,708.35</b>
<b>Credit Cards</b>	
2120 Regions Visa	0.00
2140 First Financial VISA	77,034.55
<b>Total Credit Cards</b>	<b>\$ 77,034.55</b>
<b>Other Current Liabilities</b>	
2210 401k Liability	1,876.69
2230 Miscellaneous Liabilities	17,937.68
2250 Accrued Payroll	170,546.70
2290 Deferred Revenue	2,222,219.28
<b>Total Other Current Liabilities</b>	<b>\$ 2,412,580.35</b>
<b>Total Current Liabilities</b>	<b>\$ 2,498,323.25</b>
<b>Long-Term Liabilities</b>	
2300 Office Lease Liability	744,062.87
2350 Printer Lease Liabilities	18,506.57
<b>Total Long-Term Liabilities</b>	<b>\$ 762,569.44</b>
<b>Total Liabilities</b>	<b>\$ 3,260,892.69</b>
<b>Equity</b>	
3000 Opening Bal Equity	0.00
3200 Net Assets	2,337,695.18
Net Income	130,053.92
<b>Total Equity</b>	<b>\$ 2,467,749.10</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 5,728,641.79</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Girl's Inc. of Monroe County

**Address:**

1108 W 8th Street, Bloomington, IN, 47404
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**Phone:** 812-336-1373 (Office)

**E-Mail:** girlsinc-monroe.org

**Website:** https://girlsinc-monroe.org

**President of Board of Directors:** Andrea Lee

**Name of Executive Director:** Amy Dillion

**Phone:** (317) 392-1190

**E-Mail:** adillion@girlsincshelbycounty.org

**Name of Grant Writer:** Sofia Balcius

**Phone:** 317-617-1878

**E-Mail:** sbalcius@girlsinc-monroe.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	10	4

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

National Mission: To inspire all girls to be strong, smart, and bold.

In partnership with schools and Girls Inc. centers, we prioritize the holistic development of girls. Our programs instill self-worth, encourage risk-taking, and foster the discovery and cultivation of their inherent strengths. Through enduring mentorship, supportive environments, and evidence-based programming, girls gain the tools to navigate gender, economic, and social barriers successfully. We continue to uphold the belief that every girl can develop her capacities, build self-confidence, and achieve a healthy, educated, and independent future.



## PROJECT INFORMATION

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Name of the project to be funded:

HerHealth Initiative

Total cost of project: \$90,067.00

Requested amount of Jack Hopkins funding: \$10,000

Number of City residents to be served by this project in 2024: 500

Number of clients to be served by this project in 2024: 500

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Girls Inc. of Monroe County is looking to secure funding of \$10,000 for the Her Health Initiative, aimed at enhancing the well-being of local girls. Over the next three years, we aim to build a fully autonomous program with sustainable funding, impacting the lives of over 1,000 Bloomington girls through health-based programming, outreach, and community collaboration. Our approach is supported by engaging content tailored to address the challenges exacerbated by the pandemic and meet the needs of girls in our community. The nationally recognized Girls Inc program "Mind + Body" is our foundational curriculum, addressing critical areas such as: Body Image, Nutrition, Menstrual Health, and Stress Management. Through interactive workshops, physical activities, and discussions, girls will learn strategies to enhance their physical and mental well-being. With a holistic approach, this program empowers girls to cultivate a positive relationship with their bodies, make informed choices about nutrition, and develop resilience in managing stressors effectively. The pilot phase of this program is scheduled for our summer camp program in 2024, where it will engage with around 100 girls aged 6-12. Following this initial phase, the program will be reviewed and adjusted before transitioning to in-school programming designed for local 4th graders.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed (if different than agency address):**

N/A

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Tri Kappa \$1,000 Pending  
Glenn Miller Foundation \$2,000 Confirmed

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

An initial reimbursement can be claimed once our summer camp programming has ended (August 30, 2024); we plan to utilize the remaining funds during the fall semester for in-school programming. We expect to submit a claim for the entire grant by December 1, 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

In the past month, we've opened conversations with local businesses and foundations to bolster financial support for the HerHealth Initiative. In-kind contributions from partners could encompass donated equipment, facilities for workshops, or expert consultation services. We specifically plan on utilizing our long-time partnership with our gym neighbor, Full House Fitness, for exercise programming. Our network of skilled volunteers includes fitness instructors, nutritionists, and mental health professionals, enabling the program to expand its reach and scope. Our menstrual health supplies are supplied by the Panhellenic Council at IU Bloomington, their drive raising 20,000 products for our center last year.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Summer Camp Supplies	\$4,500
Priority #2	In-School Programming Supplies	\$4,500
Priority #3	Center Supplies	\$1,000
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$10,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to the IU Health Community Needs Assessment 2021, mental health was identified as a significant community health need. Discussions with Richland Bean Blossom School Corporation Health Department have revealed local children are struggling with conflict resolution, bullying, substance abuse, and hygiene due to the isolation from peers and positive mentors since the pandemic. These same issues are seen in our Girls Inc Center and in the Monroe County Community School Corporation. In the IU Health study, Monroe County was identified as being in the bottom quartile of Indiana counties for poor mental health days, ranking 83rd out of 92. According to SCAN 2020, "access to appropriate health services and promoting healthy habits in youth and teens is critical to preventing chronic health conditions." Through concentrated effort through education, resources, and support, HerHealth aims to empower girls to adopt lifelong healthy lifestyle habits related to overall wellness, ultimately contributing to improved physical and mental health outcomes in the Bloomington community.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

While initial funding is sought for essential start-up expenses, the goal is to create a self-sustaining program that will focus on building capacity and infrastructure during the first year. This includes investing in training materials, curriculum development, and implementation with partnered schools. Girl ' s Inc. will actively seek opportunities for grant funding, sponsorships, and donations to supplement operational costs and support expansion efforts.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

By empowering girls with essential health skills, knowledge, and support networks, we are investing in the future well-being of Bloomington youth. These connections with community organizations and health professionals will continue after the initial implementation, providing ongoing resources and support for girls and their families. We're looking to set girls up for success as they navigate challenges related to puberty, body image, nutrition, and stress management. SCAN specifically mentions the importance of healthy lifestyle habits around "smoking, nutrition, exercise, and risky behaviors." We're creating long-term healthy habits:

- Girls are more likely to maintain a healthy weight, and reduce their risk of chronic diseases such as obesity, diabetes, and cardiovascular conditions.
- Stress management reduces the likelihood of developing mental health issues like anxiety and depression.
- Develop healthy attitudes towards their bodies and engage in positive self-care and resilience practices.
- Practice healthy and balanced eating habits to build healthy relationships with food and education about the effects of disordered eating
- Improved understanding of menstrual health to reduce anxiety and taboo around puberty, avoid embarrassment or disruption of daily life/school

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

All participants will take the Girl's Inc. national pre/post program survey, the Strong Smart Bold Outcomes Survey, with evaluations reviewed by our national organization. To measure the success of the HerHealth Initiative in 2024, the key outcome indicators of success will be:

- The number of girls served during summer programming
- The number of girls served during in-school programming
- Participant satisfaction with Body Image, Nutrition, Menstrual Health, and Stress Management programs
- Age of participants
- Ethnicity of participants

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Girls Inc. of Monroe County faced significant challenges during the COVID-19 pandemic, disrupting program delivery for 2020/21. Following a thorough needs assessment and collaboration with Girls Inc.'s national organization, it was determined to merge with sister affiliate, Girls Inc. of Shelbyville & Shelby County, to ensure continued impactful programming for girls in the community. Under this new operational model that focuses on in-school workshops, Girls Inc. of Monroe County remains committed to serving vulnerable populations, particularly girls from low-income areas and girls of color, providing a safe space for their growth and development as future leaders.

The core mission of the Her Health Initiative is to provide targeted support for girls in overcoming the trauma and stress stemming from the COVID-19 pandemic. Drawing from the successful outcomes of Girls Inc programming like Mind + Body, the following specific and achievable outcomes are anticipated for Monroe County:

**Enhanced Coping Skills:** Girls will identify and utilize a greater variety of positive methods for managing and releasing feelings of anger, sadness, and frustration. Girls will engage in regular practice of self-regulating techniques such as meditation, visualization, gratitude exercises, journaling, fostering positive thoughts, and utilizing creativity to maintain a hopeful state of mind.

**Increased Physical Activity:** Girls will demonstrate an increase in the amount of time spent being physically active.

**Improved Nutrition Decision-Making:** A greater number of girls will exhibit the ability to make informed decisions about food choices based on factors such as price, nutritional quality, and personal preference.

**Confidence Boost:** Girls will demonstrate heightened confidence in discussing menstrual health-related topics and addressing menstrual concerns or challenges.

**Body Image Perception:** Girls will show an improvement in body image perception, expressing greater acceptance and appreciation of their bodies.



<b>EXPENSES</b>	<b>Contribution By Your Organization</b>	<b>Funds From Other Sources</b>	<b>Request To Jack Hopkins Grant</b>	<b>Projected Total Program Cost</b>
<i>Administration</i>				
Staff Salaries/Pay	\$52,500.00			\$52,500.00
Health Insurance	\$5,450.00			\$5,450.00
403(b)	\$2,100.00			\$2,100.00
Payroll tax	\$4,017.00			\$4,017.00
Supplies	\$2,000.00	\$3,000.00	\$10,000.00	\$15,000.00
Curriculum Updates	\$7,500.00			\$7,500.00
Travel Reimbursements to Employees	\$1,000.00			\$1,000.00
Marketing & Advertising	\$500.00			\$500.00
Technology	\$2,000.00			\$2,000.00
<b>Total Project Cost</b>	<b>\$77,067.00</b>	<b>\$3,000.00</b>	<b>\$10,000.00</b>	<b>\$90,067.00</b>

**GIRLS INCORPORATED OF SHELBYVILLE**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

	Jan - Dec 23	Jan - Dec 22	\$ Change	% Change
<b>Ordinary Income/Expense</b>				
<b>Income</b>				
<b>4000 - Contibuted Support</b>				
4010.1 - Ind / Business Contri - Monroe	10,473.72	17,500.00	-7,026.28	-40.2%
<b>4440.0 - Other Grants &amp; Reimbursements</b>				
4440.1 - Passthrough from National	39,188.00	53,300.14	-14,112.14	-26.5%
4440.0 - Other Grants & Reimbursements - Other	0.00	2,035.57	-2,035.57	-100.0%
<b>Total 4440.0 - Other Grants &amp; Reimbursements</b>	39,188.00	55,335.71	-16,147.71	-29.2%
<b>4005 - Board of Director</b>	5,030.48	2,000.00	3,030.48	151.5%
<b>4010 - Indiv/business contribution</b>				
4010 - Indiv/business contribution - Other	54,842.25	74,321.77	-19,479.52	-26.2%
<b>Total 4010 - Indiv/business contribution</b>	54,842.25	74,321.77	-19,479.52	-26.2%
<b>4231 - Foundations and State Grants</b>				
4235.1 - Monroe County Foundation	892.00	0.00	892.00	100.0%
4235.2 - Monroe County - NAP Credits	3,269.48	21,100.00	-17,830.52	-84.5%
4235 - Monroe County	0.00	896.00	-896.00	-100.0%
4015 - Martin & Mary Schultz Fund	970.00	950.00	20.00	2.1%
4016 - John C. & Martha Jane DePrez	6,895.00	6,650.00	245.00	3.7%
4017 - Girls Inc. Endowment	5,800.00	5,640.00	160.00	2.8%
4018 - The Sandy Allen Fund	380.00	370.00	10.00	2.7%
4230 - Foundation and State - Other	503,348.88	354,619.42	148,729.46	41.9%
4231 - Foundations and State Grants - Other	0.00	210,000.00	-210,000.00	-100.0%
<b>Total 4231 - Foundations and State Grants</b>	521,555.36	600,225.42	-78,670.06	-13.1%
<b>4430 - SCUFFY</b>	200,650.04	196,700.04	3,950.00	2.0%
<b>Total 4000 - Contibuted Support</b>	831,739.85	946,082.94	-114,343.09	-12.1%
<b>5000 - Program Revenues</b>				
5180.1 - Program Service Fees	221,462.28	195,374.23	26,088.05	13.4%
5180.2 - Snack Money	0.00	2,068.45	-2,068.45	-100.0%
<b>5182 - Team Meets and League Fees</b>				
5184 - NGA Fees	0.00	315.00	-315.00	-100.0%
5186 - Gymnastics Meets	1,220.00	4,270.00	-3,050.00	-71.4%
5189 - Gymnastics Fundraiser	2,028.40	5,145.30	-3,116.90	-60.6%
5182 - Team Meets and League Fees - Other	705.00	0.00	705.00	100.0%
<b>Total 5182 - Team Meets and League Fees</b>	3,953.40	9,730.30	-5,776.90	-59.4%
<b>5000 - Program Revenues - Other</b>	340.81	0.00	340.81	100.0%
<b>Total 5000 - Program Revenues</b>	225,756.49	207,172.98	18,583.51	9.0%
<b>5800 - Fund Raising Activities</b>				
5850 - Monroe County Gala	41,349.94	0.00	41,349.94	100.0%
<b>5801 - Annual Giving Campaign</b>				
5801.2 - Annual Giving - Monroe Co	6,326.46	13,198.57	-6,872.11	-52.1%
5801 - Annual Giving Campaign - Other	14,686.20	36,070.53	-21,384.33	-59.3%
<b>Total 5801 - Annual Giving Campaign</b>	21,012.66	49,269.10	-28,256.44	-57.4%
<b>5823 - SC Gala</b>				
4999 - Gaming				
5821 - Giving Wall	0.00	4,445.00	-4,445.00	-100.0%
5822 - Ring/Cup Sales	3,079.00	2,407.58	671.42	27.9%
<b>Total 4999 - Gaming</b>	3,079.00	6,852.58	-3,773.58	-55.1%

**GIRLS INCORPORATED OF SHELBYVILLE**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

	Jan - Dec 23	Jan - Dec 22	\$ Change	% Change
5815 · Dinner/Dance Ticket	3,612.47	900.00	2,712.47	301.4%
5816 · Table Sponsor	33,000.00	44,350.00	-11,350.00	-25.6%
5818 · Major Sponsorship	63,000.00	71,000.00	-8,000.00	-11.3%
5819 · Donation to Gala	650.00	6,574.00	-5,924.00	-90.1%
5825 · Auction Items	11,302.59	6,610.00	4,692.59	71.0%
5823 · SC Gala - Other	600.00	12,559.78	-11,959.78	-95.2%
<b>Total 5823 · SC Gala</b>	<b>115,244.06</b>	<b>148,846.36</b>	<b>-33,602.30</b>	<b>-22.6%</b>
5840 · Purse Bingo	23,137.25	13,903.00	9,234.25	66.4%
5800 · Fund Raising Activities - Other	5,220.50	12,451.00	-7,230.50	-58.1%
<b>Total 5800 · Fund Raising Activities</b>	<b>205,964.41</b>	<b>224,469.46</b>	<b>-18,505.05</b>	<b>-8.2%</b>
6000 · Investment & Other Income				
5310 · Interest-savings/short-term inv	566.73	3,029.53	-2,462.80	-81.3%
5335 · Rental				
5335 · Rental - Other	5,619.00	1,225.00	4,394.00	358.7%
<b>Total 5335 · Rental</b>	<b>5,619.00</b>	<b>1,225.00</b>	<b>4,394.00</b>	<b>358.7%</b>
6000 · Investment & Other Income - Other	5,255.41	0.00	5,255.41	100.0%
<b>Total 6000 · Investment &amp; Other Income</b>	<b>11,441.14</b>	<b>4,254.53</b>	<b>7,186.61</b>	<b>168.9%</b>
<b>Total Income</b>	<b>1,274,901.89</b>	<b>1,381,979.91</b>	<b>-107,078.02</b>	<b>-7.8%</b>
<b>Gross Profit</b>	<b>1,274,901.89</b>	<b>1,381,979.91</b>	<b>-107,078.02</b>	<b>-7.8%</b>
<b>Expense</b>				
8193 · Concessions Expense	0.00	868.66	-868.66	-100.0%
7200 · Salaries & related expenses				
7220 · Admin Salaries & Wages	178,768.58	205,540.85	-26,772.27	-13.0%
7222 · Program Salaries & Wages	574,227.15	485,462.09	88,765.06	18.3%
7223 · Sports Salaries & Wages	0.00	654.00	-654.00	-100.0%
7224 · Gymnastics Salaries & Wages	47,546.03	47,442.51	103.52	0.2%
7230 · Pension plan contributions	14,899.73	14,962.53	-62.80	-0.4%
7240 · Employee Health benefits	21,757.35	18,970.70	2,786.65	14.7%
7245 · Fund Development Salaries	138,310.86	132,058.82	6,252.04	4.7%
7250 · Payroll taxes	72,411.16	63,829.69	8,581.47	13.4%
<b>Total 7200 · Salaries &amp; related expenses</b>	<b>1,047,920.86</b>	<b>968,921.19</b>	<b>78,999.67</b>	<b>8.2%</b>
8100 · Non-personnel expenses				
8178 · Outside Services- Other	0.00	6,841.40	-6,841.40	-100.0%
8110 · Supplies	70,696.11	59,173.69	11,522.42	19.5%
8122 · Reimbursement	801.00	240.00	561.00	233.8%
8137 · Technology Plan	23,639.19	21,141.18	2,498.01	11.8%
8140 · Postage, shipping, delivery	1,371.97	9,559.14	-8,187.17	-85.7%
8155 · Equipment	0.00	8,075.50	-8,075.50	-100.0%
8160 · Equip maintenance	0.00	8,305.99	-8,305.99	-100.0%
8170 · Printing & copying	11,474.21	4,177.22	7,296.99	174.7%
8175 · Legal and Accounting	8,984.81	0.00	8,984.81	100.0%
8199 · Other Program Service Expenses				
8145 · Competitive Meets and Fees				
8146 · Meet Registration Fees	0.00	3,032.00	-3,032.00	-100.0%
8147 · U.S.A.G. registrations	0.00	35.00	-35.00	-100.0%
8145 · Competitive Meets and Fees - Other	13,680.00	0.00	13,680.00	100.0%
<b>Total 8145 · Competitive Meets and Fees</b>	<b>13,680.00</b>	<b>3,067.00</b>	<b>10,613.00</b>	<b>346.0%</b>
8594 · Annual Awards Ceremony	1,333.55	1,540.98	-207.43	-13.5%
8597 · Travel Club	0.00	4,766.00	-4,766.00	-100.0%
8601 · Home Gymnastics Meets Expense	0.00	9,815.95	-9,815.95	-100.0%
8604 · Gymnastics Pro Shop Expense	7,491.27	7,626.26	-134.99	-1.8%
8199 · Other Program Service Expenses - Other	0.00	5,100.00	-5,100.00	-100.0%
<b>Total 8199 · Other Program Service Expenses</b>	<b>22,504.82</b>	<b>31,916.19</b>	<b>-9,411.37</b>	<b>-29.5%</b>
<b>Total 8100 · Non-personnel expenses</b>	<b>139,472.11</b>	<b>149,430.31</b>	<b>-9,958.20</b>	<b>-6.7%</b>

**GIRLS INCORPORATED OF SHELBYVILLE**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

	Jan - Dec 23	Jan - Dec 22	\$ Change	% Change
<b>8200 · Occupancy expenses</b>				
8201 · Culligan	0.00	421.00	-421.00	-100.0%
8217 · Utilities				
8225 · Trash Pick Up	1,953.57	3,885.44	-1,931.87	-49.7%
8218 · Electric	21,482.25	26,263.30	-4,781.05	-18.2%
8219 · Gas	8,545.84	9,310.33	-764.49	-8.2%
8221 · Sewage	2,298.40	2,226.09	72.31	3.3%
8223 · Water	3,009.51	2,583.52	425.99	16.5%
8217 · Utilities - Other	2,525.64	0.00	2,525.64	100.0%
<b>Total 8217 · Utilities</b>	<b>39,815.21</b>	<b>44,268.68</b>	<b>-4,453.47</b>	<b>-10.1%</b>
<b>8224.0 · Building Maintenance</b>				
8224.5 · General Maintenance	7,836.02	0.00	7,836.02	100.0%
8224.1 · Security	2,635.70	1,754.80	880.90	50.2%
8224.2 · Heating & Cooling	593.80	1,857.15	-1,263.35	-68.0%
8224.3 · Janitorial Services	0.00	19,981.04	-19,981.04	-100.0%
8224.4 · Building Supplies	1,948.48	7,549.85	-5,601.37	-74.2%
8224.6 · Cleaning Services	30,942.90	3,322.73	27,620.17	831.3%
8224.0 · Building Maintenance - Other	0.00	13,851.96	-13,851.96	-100.0%
<b>Total 8224.0 · Building Maintenance</b>	<b>43,956.90</b>	<b>48,317.53</b>	<b>-4,360.63</b>	<b>-9.0%</b>
<b>Total 8200 · Occupancy expenses</b>	<b>83,772.11</b>	<b>93,007.21</b>	<b>-9,235.10</b>	<b>-9.9%</b>
<b>8300 · Travel &amp; meetings expenses</b>				
8300 · Travel & meetings expenses - Other	16,757.78	15,549.57	1,208.21	7.8%
<b>Total 8300 · Travel &amp; meetings expenses</b>	<b>16,757.78</b>	<b>15,549.57</b>	<b>1,208.21</b>	<b>7.8%</b>
<b>8470 · Vehicle Expense</b>				
8474 · Mileage Reimbursement	5,303.20	0.00	5,303.20	100.0%
8471 · License and Fees	137.35	126.35	11.00	8.7%
8472 · Maintenance and Service	0.00	0.00	0.00	0.0%
8473 · Fuel and Oil	2,402.00	9,408.83	-7,006.83	-74.5%
8470 · Vehicle Expense - Other	0.00	600.59	-600.59	-100.0%
<b>Total 8470 · Vehicle Expense</b>	<b>7,842.55</b>	<b>10,135.77</b>	<b>-2,293.22</b>	<b>-22.6%</b>
<b>8500 · Misc expenses</b>				
8520 · Insurance - non-employee				
8524 · Chub Member	477.25	172.50	304.75	176.7%
8522 · Commercial Package w/auto	24,002.00	20,540.00	3,462.00	16.9%
8523 · Workmans Comp	6,641.25	9,574.50	-2,933.25	-30.6%
8520 · Insurance - non-employee - Other	2,213.00	2,070.00	143.00	6.9%
<b>Total 8520 · Insurance - non-employee</b>	<b>33,333.50</b>	<b>32,357.00</b>	<b>976.50</b>	<b>3.0%</b>
8530 · Membership dues - organization	14,830.00	12,975.00	1,855.00	14.3%
8570 · Advertising expenses	432.77	2,315.62	-1,882.85	-81.3%
8500 · Misc expenses - Other	0.00	25.00	-25.00	-100.0%
<b>Total 8500 · Misc expenses</b>	<b>48,596.27</b>	<b>47,672.62</b>	<b>923.65</b>	<b>1.9%</b>
<b>8591 · Special Event Expense</b>				
8593.1 · Monroe Co Gala	4,747.73	2,167.52	2,580.21	119.0%
8548 · Annual Giving Campaign	0.00	1,617.16	-1,617.16	-100.0%
8563 · Sponsorships	1,000.00	0.00	1,000.00	100.0%
8585 · Member/Staff Fundraising Expens	8,073.47	8,471.00	-397.53	-4.7%
8593 · SC Gala	60,012.41	71,353.84	-11,341.43	-15.9%
8599 · Purse Bingo Expense	6,945.08	6,260.39	684.69	10.9%
<b>Total 8591 · Special Event Expense</b>	<b>80,778.69</b>	<b>89,869.91</b>	<b>-9,091.22</b>	<b>-10.1%</b>

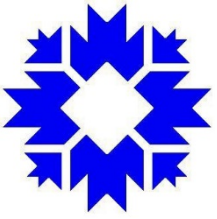
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Cash Basis

**GIRLS INCORPORATED OF SHELBYVILLE**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

	<u>Jan - Dec 23</u>	<u>Jan - Dec 22</u>	<u>\$ Change</u>	<u>% Change</u>
<b>8600 · Business expenses</b>				
5336 · Bank Fees	259.09	155.00	104.09	67.2%
8151 · Credit Card Fees	6,176.47	7,227.27	-1,050.80	-14.5%
8600 · Business expenses - Other	1,776.36	62.00	1,714.36	2,765.1%
<b>Total 8600 · Business expenses</b>	<u>8,211.92</u>	<u>7,444.27</u>	<u>767.65</u>	<u>10.3%</u>
<b>Total Expense</b>	<u>1,433,352.29</u>	<u>1,382,899.51</u>	<u>50,452.78</u>	<u>3.7%</u>
<b>Net Ordinary Income</b>	-158,450.40	-919.60	-157,530.80	-17,130.4%
<b>Other Income/Expense</b>				
<b>Other Income</b>				
9999 · Miscellaneous Income	74,662.96	0.00	74,662.96	100.0%
4000.1 · Capital Campaign	9,468.33	0.00	9,468.33	100.0%
5900 · Concessions				
5900 · Concessions - Other	260.00	0.00	260.00	100.0%
<b>Total 5900 · Concessions</b>	<u>260.00</u>	<u>0.00</u>	<u>260.00</u>	<u>100.0%</u>
5980 · Interest income	0.00	0.00	0.00	0.0%
<b>Total Other Income</b>	<u>84,391.29</u>	<u>0.00</u>	<u>84,391.29</u>	<u>100.0%</u>
<b>Net Other Income</b>	<u>84,391.29</u>	<u>0.00</u>	<u>84,391.29</u>	<u>100.0%</u>
<b>Net Income</b>	<u><u>-74,059.11</u></u>	<u><u>-919.60</u></u>	<u><u>-73,139.51</u></u>	<u><u>-7,953.4%</u></u>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Hotels For Hope Inc

**Address:**

1840 S. Walnut St Suite 105 Bloomington, IN, 47401
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**Phone:** 812-219-8817

**E-Mail:** h4hbloomington@gmail.com

**Website:** h4hbloomington.org

**President of Board of Directors:** Katie Norris

**Name of Executive Director:** Katie Norris

**Phone:** 812-219-8817

**E-Mail:** knorris1615@gmail.com

**Name of Grant Writer:** Katie Norris

**Phone:** 812-219-8817

**E-Mail:** knorris1615@gmail.com

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
1	0	10

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Hotels For Hope Inc. is grounded in low-barrier, housing-first principles that have been proven to reduce homelessness and save precious community resources. Our mission is to provide rapid interventions and support services that can prevent or end chronic homelessness. Wrap-around services are provided to support participants in their efforts to overcome homelessness with their dignity intact while gaining the self-confidence needed to not only survive but to thrive.

## PROJECT INFORMATION

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Name of the project to be funded:

H4H Emergency Hotel Room Stays

Total cost of project: \$55,000

Requested amount of Jack Hopkins funding: \$30,000

Number of City residents to be served by this project in 2024: 100

Number of clients to be served by this project in 2024: 100

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$30,000 to pay for emergency hotel stays to those in the community needing shelter due to domestic violence, emergency medical situations, deadly weather conditions, ect.

H4H is a low barrier, housing first model that uses a holistic wraparound approach to shelter families and individuals during emergency and transitional situations. We use intensive individualized casework to overcome any and all barriers participants face in regard to housing stability. The overall goal of H4Hs Emergency and Transitional Program is to keep families and individuals safe during their experience with homelessness and help them transition into stable long-term housing.

Intensive individualized casework is the key to successfully overcoming barriers associated with homelessness and transitioning families into stable long-term housing. With the support provided by caseworkers, individuals/families have a much higher chance of not only attaining but maintaining stable long-term housing. The goal is to help as many community members as possible eliminate the future need of valuable community resources associated with homelessness.



# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

Best Value Inn  
200 Indiana 45/46 Bypass,  
Bloomington, IN 47408

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

\$4,000 Downtown Outreach Grant	Confirmed
\$21,000 Community Donations	Pending

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit our claims for reimbursement monthly or bimonthly until all funds are used.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

The community provides donations at an astounding rate. Last year the community provided over \$49,000 in support of our mission.

--Volunteers provide fundraising, networking, book keeping, transportation, food/supply delivery, mental health support, ect.

--In-Kind material support contributions include; food, clothing, hygiene supplies, toys/games, diapers, ect.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Emergency Hotel Room Fees	\$30,000
Priority #2		
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$30,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

While emergency shelter primarily focuses on meeting the basic need for a warm, safe space to sleep, transitional housing tends to offer its residents more comprehensive services like case management, transportation, or assistance with employment. (P. 138)

Some shelters offer both emergency housing as well as longer-term transitional housing. Because people who experience homelessness often face additional challenges, many shelters offer a variety of services. Such services include case management, substance abuse prevention and treatment, employment services, and provision of food, clothing, and hygiene items. (p.138)

A qualifying disability is a diagnosable substance abuse disorder, a serious mental illness, developmental disability, or chronic physical illness or disability, including the co-occurrence of two or more of these conditions. (P. 138)

H4H is able to offer a holistic-care approach with wraparound services to those who are in our transitional rooms. While we are low-barrier, we focus our transitional rooms primarily on families who have one or more member that meet our criteria for high-risk. This includes those escaping domestic violence, having a qualifying disability, or are chronically homeless. H4H defines a family as, two or more individuals who love each other.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

The funds requested for Emergency Hotel Room Fees is a one time investment in over 350 overnight stays for those experiencing emergency situations and to be used once all other local shelter options have been exhausted. On more than one occasion, during emergency weather conditions we have provided over 60 individuals with emergency hotel rooms in a single night who would otherwise have slept outside.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

Homelessness is currently a huge problem for our community. The resources to ensure survival and encourage success for those experiencing homelessness in our community are extremely costly. H4H is working to not only help ensure survival but to help those in need completely overcome homelessness. Each individual/family that is able to successfully overcome homelessness eliminates the future cost for our community to provide valuable homeless related services.

Long-term benefits to the community include:

Less need for:

- Shelter Services
- Food Services
- Clothing Services
- Emergency Medical Services
- Mental Health Services
- Department of Child Services
- Area 10 Aging Services
- BPD Services
- Local Church Outreach Services
- Homeless Outreach Services

Hotel rooms alleviate the effects of poverty by reducing susceptibility to disease both communicable and non-communicable while maintaining a healthy distance from others and having a safe, sanitary place to recover. Hotel rooms decrease absences from school and work by providing stability to receive transportation, a place to keep belongings, maintain hygiene, and use Wi-Fi.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Through the use of our Emergency Hotel Room Stays we are able to take emergency cases off the hands of other local agencies and provide Crisis Intervention, Shelter, Casework, Material Support and more. Indicators we use are the data from caseworkers based on the amount of emergency cases we are able to provide services for that we get from individuals or other local agencies including DCS, BPD, Stride Center, Local Shelters, Community Kitchen, IRA, ect. For example, ability to provide services to X number of families referred to us by DCS or Ireland Homebased Services to avoid separation due to lack of shelter. X number of individuals referred to us by Friends Place Shelter when they ran out of beds. X amount of individuals referred to us from Bloomington Hospital Emergency Room Caseworkers when discharging patients had nowhere to recover. X number of Stride Center Clients who were unable to find any other shelter options. X number of clients working on reentry from New Leaf New Life. X number of clients from BPD needing shelter from violence or emergency weather conditions.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

In 2021 we were able to use the funding from the Jack Hopkins Grant to successfully transition 33 community members into stable long-term housing of their own.

In 2022 we were able to use the funding from the Jack Hopkins Grant to successfully transition 10 families into stable long-term housing. We were able to use the funding to pay for casework that provides service to our clients and assists other local social service agencies.

In 2023 we saw a huge increase for the need to shelter families with children in emergency situations. Domestic Violence cases took most of our funding as women and children are referred to us by Middle Way House, BPD, DCS, Youth Services Bureau, and Ireland Homebased Services. With funding H4H can take a referral and place a family safely together in a hotel room in less than 30 minutes 24 hours a day 7 days a week.

In 2023 we were able to use the Jack Hopkins Funding to provide over 140 Emergency Overnight Stays.

Bloomington is lucky to have so many great resources to assist families in need but there just are not enough. There is a major gap for emergency situations involving mental health and substance abuse crisis situations, domestic violence, children, and medical emergencies. H4H is willing and able to quickly fill that gap without hesitation or prejudice when funding is available! Due to lack of funds, we have to turn so many families/individuals away on the phone with desperate caseworkers pleading with us to help their clients.

With funding from the 2024 Jack Hopkins grant we can shelter those in need in our community who are unable to receive services through other local agencies. H4H has never given up since day one and we don't intend to start now. The community support for our mission and efforts never ceases to amaze us. Our dedicated team is determined to find and acquire the necessary funding to help our most vulnerable community members not only survive but thrive. If we receive funding from the Jack Hopkins Grant, we will use it to leverage other funds to help support our program and those in our community who not only need it but who deserve to have their basic human needs met.

If we receive less funding than requested we will adjust our project and use the funds to help as many people as possible.

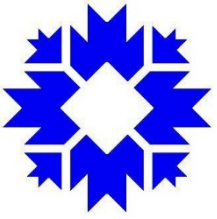
Hotels For Hope Inc  
(H4H, Hotels For Homeless)  
Jack Hopkins Social Service Grant  
Project Budget

\$30,000 -- Emergency Hotel Room Fees for over 350 Overnight Stays



## H4H 2023 End Of Year Financial Statement

<b>Total Income:</b>	\$64,128.25
<b>Starting Balance:</b>	\$5,125.85
<b>Grants/Government Funding:</b>	\$14,895.00
<b>Donations:</b>	\$49,233.25
<b>Total Expenses:</b>	\$69,056.71
<b>Shelter Expenses:</b>	\$42,056.71
<b>Payroll:</b>	\$27,000.00
<b>Ending Balance:</b>	\$197.35



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Indiana Recovery Alliance

**Address:**

118 S. Rogers St. Suite 2 Bloomington, IN 47404
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**Phone:** 812-567-2337

**E-Mail:** info@indianarecoveryalliance.org

**Website:** https://indianarecoveryalliance.org

**President of Board of Directors:** Alicia Suarez

**Name of Executive Director:** Nicholas Voyles

**Phone:** 812-361-6451

**E-Mail:** nick@indianarecoveryalliance.org

**Name of Grant Writer:** Liz Curran-Groome

**Phone:** 609-375-5636

**E-Mail:** liz@indianarecoveryalliance.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	5	15

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The IRA shifts resources and power to people who use drugs. We reduce both the individual and structural harms caused by racialized drug policy through direct action and advocacy.

## PROJECT INFORMATION

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Name of the project to be funded:

Linkage to Care Coordinator

Total cost of project: 30000

Requested amount of Jack Hopkins funding: 20000

Number of City residents to be served by this project in 2024: 3000

Number of clients to be served by this project in 2024: 3000

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$20,000 for the salary for a new, dedicated, Linkage to Care position that will provide case management to the Indiana Recovery Alliance's participants. This position will link participants to programs and services, assisting people to fill out forms for benefits, make healthcare appointments, and register for recovery programs and treatment. Though we have provided these services in an adhoc fashion for a decade, consolidating this function into a dedicated role will mean case management for participants. The Linkage to Care Coordinator will come to know participants and their circumstances, creating a more cohesive and intentional experience for people who use drugs who are looking to make positive changes at the Indiana Recovery Alliance.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

Indiana Recovery Alliance -- we are moving to a new building in July at 1710 W. 3rd St. in Bloomington.

**Do you own or have site control of the property at which the project is to take place?**

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**Is the property zoned for your intended use?**

Yes

No

N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

We have a combined total of \$10,000 we can allocate to the remaining balance for this salary in the next year from indirect expense line items from the Accelerator Initiative and Aids United Harm Reduction Futures Fund grants.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We would submit claims for reimbursement quarterly, based on the 2/3 of the salary this money would fund and claims would include payroll reports for the employee.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

The other funding will be received this summer in time for the initiation of this role at the time of our move to our new building in July.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

This project leverages the other grant funds previously listed as well as in-kind donations of food, clothes, and other necessities to help meet the immediate needs of participants as they work with the Linkage to Care Coordinator to make and meet longer term goals and recovery objectives. This project also leverages extensive volunteer contributions as volunteers are often the first interaction that participants have with someone at the Indiana Recovery Alliance and volunteers help do many of our participant intakes which will be vital in streamlining the linkage to care for participants by the Coordinator.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	20 Hours of linkage to care position per week at \$20/hr	\$20,000/yr
Priority #2		
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		\$20,000



# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The damages caused by opioid use to Monroe county from 2003-2017 are listed at \$683,848,188 on page 8 of the 2020 Service Community Assessment of Needs for Monroe County. The need to address homelessness, substance use, and supportive services are all listed in the 2020-2024 Consolidated Plan, all of which this position will help to address in our community. By assisting our our Syringe Service Program participants in accessing the kinds of services and programs that are absolute prerequisites to recovery from substance use, to stable housing, and to good mental and physical health, the Linkage to Care Coordinator will be playing a critical role in helping people in the midst of chaotic drug use and/or homelessness transition into recovery, housing, and good health.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This will be the first year of this Linkage to Care position at the IRA and the Jack Hopkins Funds will make it possible for us to jump-start the role. We will take full advantage of this year of funding by collecting metrics to demonstrate the efficacy of the role which will help us get long-term funding from other grants for the position in the future.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

This position will enable us to assist participants in making and executing personalized and holistic recovery plans that encompass everything from how to address their drug use, to their physical and mental wellbeing, to their housing and social support systems. The positive outcomes and longterm value to the Bloomington and Monroe County community are hard to overstate as this kind of long term case management and wraparound service helping our participants navigate systems of care and pathways to recovery has the potential to house hundreds of our participants who are living in non-traditional settings and to make progress towards recovery from substance use for our hundreds of participants who are in the midst of chaotic use and who are looking to make positive change in their lives.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

The outcome indicators we will use to measure the success of our project will include the number of connections to care, services, programs, and housing actually executed. Appointments made AND attended, social services successfully enrolled in, and housing placements achieved will all be tracked and reported.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

## 2024 Proposed Project Budget - Sample

Sample Organization	Sample Project Name		
Total Project Cost	\$5,000		
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			20,000.00
Other Grants		10,000.00	
<b>TOTAL PROJECT FUNDS</b>	<b>30,000.00</b>	<b>10,000.00</b>	<b>20,000.00</b>
<b>EXPENSES</b>			
Hourly Pay (\$20/hr for 30 hrs/wk)		10,000.00	20,000.00
<b>TOTAL PROJECT EXPENSES</b>	<b>30,000.00</b>	<b>10,000.00</b>	<b>20,000.00</b>

# Indiana Recovery Alliance

## Statement of Activity

January - December 2023

	TOTAL
Revenue	
Contributed Revenue	
Donations	21,147.84
Fees for Services	75.00
Grants	
Accelerator Grant	117,700.00
Aids United	
Covid Tier1	33,000.00
<b>Total Aids United</b>	<b>33,000.00</b>
AU SSP Futures Funding	10,000.00
Broadway Cares	7,500.00
City of Bloomington	45,498.87
Comer Foundation	15,000.00
Digital Equity Grant	4,100.00
Greater Health Foundation of Indiana	6,681.00
HepC Grant 2023	35,288.16
HepConnect	60,100.00
IN FSSA Reimbursements	105,554.10
Monroe Co Health Dept	26,955.30
NASDAT	112,500.00
Sophia Travis 2023	9,640.00
Syringe Access Fund 2023	9,900.00
TGF I Grant 2023	6,352.50
<b>Total Grants</b>	<b>605,769.93</b>
<b>Total Contributed Revenue</b>	<b>626,992.77</b>
Merchandise Sales	3,009.67
Service Fees Donations	2,000.00
<b>Total Revenue</b>	<b>\$632,002.44</b>
GROSS PROFIT	<b>\$632,002.44</b>
Expenditures	
Advertising	1,061.01
Printing	8.20
<b>Total Advertising</b>	<b>1,069.21</b>
Auto	
Mileage / Fuel	3,380.02
Parking	26.10
Vehicle Maintenance	6,845.70
<b>Total Auto</b>	<b>10,251.82</b>
CASA Training	150.00

# Indiana Recovery Alliance

## Statement of Activity

January - December 2023

	TOTAL
Client Incentives	24.60
Compensation	
Wages	0.00
Bethany P.	4,425.67
Elizabeth C.	33,725.44
Harry C.	960.00
Hunter T.	9,913.39
Julie P.	20,155.21
Kassandra B.	150.00
Kyle H.	19,486.58
Lauren D.	5,158.12
Matthew L.	11,425.26
Nick V.	50,443.04
Scott P.	38,615.53
Whitney M.	26,750.11
<b>Total Wages</b>	<b>221,208.35</b>
<b>Total Compensation</b>	<b>221,208.35</b>
Contract Labor	4,090.00
Dues & Subscriptions	85.00
Employee Benefits	
Retirement Matching	730.19
<b>Total Employee Benefits</b>	<b>730.19</b>
Fees for Services	
Low-threshold Employment Management	14,075.36
	25,472.80
<b>Total Fees for Services</b>	<b>39,548.16</b>
Freight & Delivery	558.29
Information / Technology	6,878.20
Insurance	11,237.27
Insurance - Worker's Comp	3,675.18
<b>Total Insurance</b>	<b>14,912.45</b>
Legal & Professional Fees	14,152.26
Member Benefits	40.00
Meals and Entertainment	3,309.49
Participant Incentive	5,251.80
<b>Total Member Benefits</b>	<b>8,601.29</b>
Office Expenses	753.87
SSP Supplies	158,005.60
Supplies	28,527.90
<b>Total Office Expenses</b>	<b>187,287.37</b>

# Indiana Recovery Alliance

## Statement of Activity

January - December 2023

	TOTAL
Other Expenses	
Bank Charges	41.80
Disposal Fees	2,346.82
Shipping	1,795.61
Taxes & Licenses	265.43
<b>Total Other Expenses</b>	<b>4,449.66</b>
Parking	66.30
Payroll Taxes	17,430.49
Promotional Events	150.00
Purchases	762.80
Rent or Lease	9,750.00
Storage Unit	1,335.00
<b>Total Rent or Lease</b>	<b>11,085.00</b>
Repair & Maintenance	839.78
Telephone Expense	3,689.41
Travel	16,134.85
Travel Meals	126.95
<b>Total Expenditures</b>	<b>\$564,282.43</b>
NET OPERATING REVENUE	<b>\$67,720.01</b>
Other Revenue	
Interest Earned	157.79
<b>Total Other Revenue</b>	<b>\$157.79</b>
Other Expenditures	
Depreciation	17,600.00
<b>Total Other Expenditures</b>	<b>\$17,600.00</b>
NET OTHER REVENUE	<b>\$ -17,442.21</b>
NET REVENUE	<b>\$50,277.80</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Middle Way House, Inc.

**Address:**

338 S. Washington Street Bloomington, IN 47401
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**Phone:** 812-333-7404

**E-Mail:** grantsmanager@middlewayhouse.org

**Website:** www.middlewayhouse.org

**President of Board of Directors:** Kathleen Sideli

**Name of Executive Director:** Carrie Stillions

**Phone:** 812-333-7404

**E-Mail:** carrie@middlewayhouse.net

**Name of Grant Writer:** Kloe Timmons

**Phone:** 812-333-7404

**E-Mail:** grantsmanager@middlewayhouse.org



## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
20	25	20-30

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Middle Way House works to support all survivors of domestic violence, sexual assault, and human trafficking; and to educate the community through outreach and prevention programs. Our clients are at the center of all that we do. By centering the client, we acknowledge our work is for them and affirm that they will be treated with dignity and respect as they receive comprehensive, trauma-informed, and culturally inclusive services based on their self-identified needs and/or desired course of action.

## PROJECT INFORMATION

---

Name of the project to be funded:

New Wings Emergency Shelter Keypad Entry Locks

Total cost of project: 7939.20

Requested amount of Jack Hopkins funding: 7939.20

Number of City residents to be served by this project in 2024: 50+

Number of clients to be served by this project in 2024: 60+

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Middle Way House is requesting \$7,939.20 to purchase and install 12 keypad entry locks on shelter room doors. Currently, Middle Way House is unable to offer resident survivors the ability to lock their rooms when they are not there. The installation of keypad entry locks will allow Middle way House to provide modern safety protocols to residents by creating unique key-codes that are changed after a resident leaves their room.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

Same as agency address

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Middle Way House owns the New Wings administrative and shelter building.

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Middle Way House receives grant funding for the operation of the emergency shelter. This funding primarily pays for direct service salaries and FICA, emergency shelter utilities, and emergency shelter insurance. Middle Way House does not anticipate alternative funds for the specific keypad entry lock project.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Upon notice of award, Middle Way House promptly will schedule the purchase and installation of 12 key-pad entry locks on shelter room doors with Indiana Door and Hardware. Middle Way House anticipates that installation would be complete in October 2024, upon which Middle Way House will submit claims for reimbursement. In the event that the project is not completed in or before October 2024, Middle Way House will submit claims no later than the first week of December 2024.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

This project will leverage in-kind cash contributions if a partial amount is awarded.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	12 Key-pad entry locks & installation	7939
Priority #2		
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		7939.20

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The New Wings Emergency Shelter at MWH houses individuals who are considered homeless due to fleeing domestic violence, sexual violence, and human trafficking. While residing in shelter, survivors have access to 24/7 crisis intervention services, clothing, food, and case-management. Shelter residents are also to bring dependents in their care to shelter, offering safe, secure housing to youth in our community who have experienced violence. The majority of residents are low-income residents of the City of Bloomington. This project will allow survivors to continue having access to these services while feeling an enhanced feeling of security while residing in our emergency shelter.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

The installation of the key-pad entry locks will be a one-time investment. The locks will be purchased and installed on the doors and will not require any future investments to maintain, aside from any future repairs to locks that may arise due to typical usage.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Middle Way House has been operating its emergency shelter and crisis intervention services in some form for over 50 years. In the past, Middle Way House has heard safety concerns from residents residing in shelter. Middle Way House actively takes steps to increase safety, including door buzzers, front gates, window film, and more. By increasing safety protocols through the use of keypad entry locks, survivors will continue to feel safe at Middle Way House, allowing Middle Way House to continue to provide services to individuals fleeing violence within our community.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Middle Way House provides roughly 3,600-5,200 shelter nights to survivors and their dependents a year. The installation of key-pad entry locks will mitigate safety concerns of residents, and allow residents to feel safe staying at Middle Way House for an extended period of time. Upon exit, survivors may take exit surveys to report on their success while in shelter and their feelings of safety. Middle Way House anticipates that, after the installation of keypad entry locks, 95% of survivors or more who are completing an exit survey will report "Yes" to feeling safe while residing in shelter.



## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Middle Way House has recently experienced a large amount of turnover within the organization, including several positions in the emergency shelter. Middle Way House works diligently to ensure that survivors are not impacted by staff retention. New staff members have been placed in full-time roles within the emergency shelter, who are actively seeking new ways to improve our programs and are hopeful to begin implementing new projects such as the keypad entry locks so that they can best serve survivors.

Middle Way House, Inc.	New Wings Emergency Shelter Keypad Entry Locks
<b>Total Project Cost:</b>	\$7,939.20

**Expenses:**

	Cost	Total	
12 Keypad Door Locks	\$6,739.20		
Estimated Labor	\$1,200.00		
		<b>\$7,939.20</b>	

**Funds:**

	JHSS Grant	Total	
Keypad Door Locks and Labor	\$7,939.20		
		<b>\$7,939.20</b>	

Middle Way House intends on leveraging in-kind cash donations if a partial award is given.

# Quote

Indiana Door & Hardware Specialties Inc.  
 PO Box 278  
 Bloomington, IN 47402  
 Ph# 812-336-0813 Fax# 812-336-0848

Date	Quote #
6/9/2023	3155

Name / Address
Middleway House PO Box 95 Bloomington, IN 47402 ATTN: Lauren Fox

Rep	Project

Description	Qty	Total
Yale NexTouch keypad lock *Note these are available with key override. We have a sample of this lock at our shop	12	6,739.20
Alternate for labor to install either of above		1,200.00
Excludes installation, sales tax, anything not listed above.		
<b>Total</b>		<b>\$7,939.20</b>

*Facilities*  
*Lauren Fox*

**Middle Way House Inc**  
**Balance Sheet Prev Year Comparison**  
As of December 31, 2023

Accrual Basis

	Dec 31, 23	Dec 31, 22	% Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
100010 · Main Source - Opr 7316865	83,316.71	63,194.91	31.8%
100012 · Main Source - MM 7316852	7,042.99	7,039.46	0.1%
100014 · Union Savings Bank	1,898.87	21,013.73	-91.0%
101000 · German American-Opr 1015163	169,044.96	145,665.32	16.1%
<b>Total Checking/Savings</b>	<b>261,303.53</b>	<b>236,913.42</b>	<b>10.3%</b>
<b>Accounts Receivable</b>			
<b>120000 · Accts Rec</b>			
122000 · PERM HOUSING - Accts Recv	2,216.00	1,091.00	103.1%
123000 · GRANTS - Accts Recv	577,054.06	739,051.10	-21.9%
125000 · RELATED PARTIES - Accts Recv	458,454.03	255,103.96	79.7%
125650 · Allowance for Doubtful Grants	-241,765.58	-241,765.58	0.0%
<b>Total 120000 · Accts Rec</b>	<b>795,958.51</b>	<b>753,480.48</b>	<b>5.6%</b>
<b>Total Accounts Receivable</b>	<b>795,958.51</b>	<b>753,480.48</b>	<b>5.6%</b>
<b>Other Current Assets</b>			
<b>Inventory - Vehicles</b>			
119000 · Undeposited Funds	500.00	500.00	0.0%
	11,260.22	9,395.59	19.9%
<b>Total Other Current Assets</b>	<b>11,760.22</b>	<b>9,895.59</b>	<b>18.8%</b>
<b>Total Current Assets</b>	<b>1,069,022.26</b>	<b>1,000,289.49</b>	<b>6.9%</b>
<b>Fixed Assets</b>			
<b>150000 · Furniture &amp; Equipment</b>			
<b>150100 · Equipment</b>			
153000 · Furniture and Fixtures	9,821.65	9,821.65	0.0%
154000 · Office Equipment	35,734.59	31,922.63	11.9%
	28,625.63	28,625.63	0.0%
<b>Total 150000 · Furniture &amp; Equipment</b>	<b>74,181.87</b>	<b>70,369.91</b>	<b>5.4%</b>
<b>150300 · Bldgs &amp; Improvements</b>			
<b>152002 · Coke Bldg.</b>			
1503b · Bldg & Imp Coke Bldg Contractor	4,122,044.50	4,122,044.50	0.0%
152021 · Improvements - Coke Bldg.	454,323.83	454,323.83	0.0%
1520211 · Contractor	1,345,078.05	1,345,078.05	0.0%
1520212 · Courtyard	0.48	0.48	0.0%
<b>Total 152002 · Coke Bldg.</b>	<b>5,921,446.86</b>	<b>5,921,446.86</b>	<b>0.0%</b>
<b>Total 150300 · Bldgs &amp; Improvements</b>	<b>5,921,446.86</b>	<b>5,921,446.86</b>	<b>0.0%</b>

**Middle Way House Inc**  
**Balance Sheet Prev Year Comparison**  
As of December 31, 2023

Accrual Basis

	Dec 31, 23	Dec 31, 22	% Change
151000 · Automobiles	24,639.29	24,639.29	0.0%
156000 · Land	348,676.00	348,676.00	0.0%
160000 · Accumulated Depreciation	-2,194,121.00	-2,036,971.00	-7.7%
<b>Total Fixed Assets</b>	<b>4,174,823.02</b>	<b>4,328,161.06</b>	<b>-3.5%</b>
<b>Other Assets</b>			
180000 · Investments			
181000 · Mutual Funds - VG Social Index	38,984.37	29,938.27	30.2%
183000 · Certificates of Deposit	0.00	75,731.82	-100.0%
<b>Total 180000 · Investments</b>	<b>38,984.37</b>	<b>105,670.09</b>	<b>-63.1%</b>
<b>Total Other Assets</b>	<b>38,984.37</b>	<b>105,670.09</b>	<b>-63.1%</b>
<b>TOTAL ASSETS</b>	<b>5,282,829.65</b>	<b>5,434,120.64</b>	<b>-2.8%</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
200000 · Accounts Payable	13,706.07	34,455.29	-60.2%
<b>Total Accounts Payable</b>	<b>13,706.07</b>	<b>34,455.29</b>	<b>-60.2%</b>
<b>Other Current Liabilities</b>			
206000 · Security Deposits PH	6,098.00	6,098.00	0.0%
<b>222100 · Payroll Liabilities</b>			
Garnishments Payable	100.00	0.00	100.0%
220000 · Accrued Vacation Payable	15,740.80	15,740.80	0.0%
220500 · Accrued Wages Payable	0.00	19,481.55	-100.0%
222500 · Employee WH Dental/Vision	523.51	0.00	100.0%
224100 · Indiana Unemployment	754.67	2,749.37	-72.6%
227001 · State and Local WH	5,084.60	4,365.42	16.5%
222100 · Payroll Liabilities - Other	483.74	148.98	224.7%
<b>Total 222100 · Payroll Liabilities</b>	<b>22,687.32</b>	<b>42,486.12</b>	<b>-46.6%</b>
<b>Total Other Current Liabilities</b>	<b>28,785.32</b>	<b>48,584.12</b>	<b>-40.8%</b>
<b>Total Current Liabilities</b>	<b>42,491.39</b>	<b>83,039.41</b>	<b>-48.8%</b>
<b>Total Liabilities</b>	<b>42,491.39</b>	<b>83,039.41</b>	<b>-48.8%</b>
<b>Equity</b>			
Retained Earnings	107,030.97	297,996.37	-64.1%

**Middle Way House Inc**  
**Balance Sheet Prev Year Comparison**  
**As of December 31, 2023**

Accrual Basis

	Dec 31, 23	Dec 31, 22	% Change
<b>300000 · Net Assets</b>			
311000 · Temporarily Restricted	460,088.00	460,088.00	0.0%
320000 · Unrestricted	4,628,441.61	4,628,441.61	0.0%
320100 · Board Designated	155,520.65	155,520.65	0.0%
330100 · Released from Restrictions	35,552.30	35,552.30	0.0%
330200 · Released to Unrestricted	-35,552.30	-35,552.30	0.0%
<b>Total 300000 · Net Assets</b>	5,244,050.26	5,244,050.26	0.0%
<b>Net Income</b>	-110,742.97	-190,965.40	42.0%
<b>Total Equity</b>	5,240,338.26	5,351,081.23	-2.1%
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>5,282,829.65</b>	<b>5,434,120.64</b>	<b>-2.8%</b>

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**Middle Way House Inc**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

Accrual Basis

	Jan - Dec 23	Jan - Dec 22	% Change
<b>Ordinary Income/Expense</b>			
<b>Income</b>			
400000 · Grants	1,138,781.28	1,149,221.09	-0.9%
403000 · Contributions Income			
4001.00 · Donations - MWH			
4002 · Donations - Rise	1,650.00	0.00	100.0%
4270AD · Unrestricted	620.00	434.00	42.9%
4001.00 · Donations - MWH - Other	421,367.74	431,126.87	-2.3%
<b>Total 4001.00 · Donations - MWH</b>	423,637.74	431,560.87	-1.8%
4210AD · United Way	42,100.38	46,200.86	-8.9%
422500 · Restricted			
423020 Martha Voyles Ripple Fnd	311.96	723.01	-56.9%
422700 · Foundations & Awards	250.00	0.00	100.0%
423010 · Toby Strout VOICES Fund	14,875.00	24,358.56	-38.9%
423015 · T Strout Ed & Infrastructure Fd	21,661.58	29,143.66	-25.7%
423030 · Endowment Fund Cmty Fnd	197.44	102.56	92.5%
4260AD · NAP Credits	17,906.54	22,200.00	-19.3%
<b>Total 422500 · Restricted</b>	55,202.52	76,527.79	-27.9%
<b>Total 403000 · Contributions Income</b>	520,940.64	554,289.52	-6.0%
417000 · Program Fees			
4370-AD · Childcare Fees	15,344.56	21,934.99	-30.1%
<b>Total 417000 · Program Fees</b>	15,344.56	21,934.99	-30.1%
4380AD · Other Income			
9720AD · Laundry (Rent)	12.81	3.06	318.6%
9740AD · Miscellaneous Income	32.32	0.00	100.0%
9750AD · Rental Income	77,588.00	67,970.00	14.2%
4380AD · Other Income - Other	250.00	250.00	0.0%
<b>Total 4380AD · Other Income</b>	77,883.13	68,223.06	14.2%
4401AD · Fundraising	66,137.28	31,964.10	106.9%
950000 · Investment Income			
9501AD · Dividends	428.70	402.26	6.6%
9502AD · Unrealized Gain/Loss on Invest	9,046.10	-10,079.94	189.7%
9520AD · Interest	12,235.15	1,255.86	874.2%
<b>Total 950000 · Investment Income</b>	21,709.95	-8,421.82	357.8%
<b>Total Income</b>	1,840,796.84	1,817,210.94	1.3%
<b>Gross Profit</b>	1,840,796.84	1,817,210.94	1.3%
<b>Expense</b>			

**Middle Way House Inc**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

Accrual Basis

	Jan - Dec 23	Jan - Dec 22	% Change
502800 · Employee Appreciation	3,784.21	1,022.08	270.3%
5100AD · Advertising	42.00	990.39	-95.8%
5150AD · Automobile Expense			
515500 · Other	637.00	0.00	100.0%
515600 · Fuel	44.92	0.00	100.0%
515700 · Repairs	114.93	25.99	342.2%
515800 · Uber, Taxi	600.00	733.38	-18.2%
5150AD · Automobile Expense - Other	133.07	0.00	100.0%
<b>Total 5150AD · Automobile Expense</b>	<b>1,529.92</b>	<b>759.37</b>	<b>101.5%</b>
516000 · Bad Debts	32.85	-5,223.29	100.6%
5170AD · Bank Service Charges	3,661.35	3,429.32	6.8%
5190AD · Client Rent Assistance	61,320.00	29,329.00	109.1%
519900 · Client Direct Assistance	-174.20	4,064.21	-104.3%
530000 · Compensation			
500200 · Salaries and Wages	1,387,915.60	1,368,229.11	1.4%
5300AD · Payroll Taxes	132,153.39	156,841.99	-15.7%
5350AD · Health Insurance/Benefits	6,963.36	7,336.43	-5.1%
536000 · Workstudy/Interns	556.35	6,583.25	-91.6%
<b>Total 530000 · Compensation</b>	<b>1,527,588.70</b>	<b>1,538,990.78</b>	<b>-0.7%</b>
5400AD · Contract Labor	260.00	240.00	8.3%
5410AD · Conferences	265.67	31.20	751.5%
5411AD · Training	1,386.00	-325.00	526.5%
5700AD · Dues and Fees	2,305.95	3,812.08	-39.5%
580000 · Restricted Fund Expenditures			
580020 · Martha Voyles Ripple Fund	16.00	134.82	-88.1%
<b>Total 580000 · Restricted Fund Expenditures</b>	<b>16.00</b>	<b>134.82</b>	<b>-88.1%</b>
590600 · FDE Fundraising Direct Expense			
590632 · Postage/Mailing	528.00	785.32	-32.8%
590600 · FDE Fundraising Direct Expense - Other	12,366.49	8,008.00	54.4%
<b>Total 590600 · FDE Fundraising Direct Expense</b>	<b>12,894.49</b>	<b>8,793.32</b>	<b>46.6%</b>
6000AD · Insurance	49,404.81	67,996.84	-27.3%
6200AD · Miscellaneous	277.12	-1,482.41	118.7%
6300AD · Occupancy			
5800AD · Equipment Rent and Maint	3,880.67	18,498.18	-79.0%
6310AD · Transportation	1,482.05	1,388.50	6.7%
6320AD · Laundry	1,233.84	1,098.42	12.3%
6330AD · Food	10,961.54	14,082.53	-22.2%
6335AD · Security	31,377.36	10,627.13	195.3%
6340AD · Building Repairs and Maint	17,805.13	9,214.71	93.2%
6350AD · Rent	4,150.00	3,900.00	6.4%



**Middle Way House Inc**  
**Profit & Loss Prev Year Comparison**  
**January through December 2023**

Accrual Basis

	Jan - Dec 23	Jan - Dec 22	% Change
6360AD · Supplies	-1,212.18	-146.81	-725.7%
6361AD · Trash Removal	2,887.58	1,639.04	76.2%
6370AD · Utilities	60,539.70	83,530.02	-27.5%
6800AD · Telephone	18,597.91	18,359.93	1.3%
6300AD · Occupancy - Other	-51.00	437.65	-111.7%
<b>Total 6300AD · Occupancy</b>	<b>151,652.60</b>	<b>162,629.30</b>	<b>-6.8%</b>
635000 · Travel & Ent			
6905AD · Conference Registration	0.00	749.00	-100.0%
6910AD · Meals	40.59	0.00	100.0%
6940AD · Program travel	315.00	400.00	-21.3%
6946AD · Mileage	1,496.42	2,619.56	-42.9%
<b>Total 635000 · Travel &amp; Ent</b>	<b>1,852.01</b>	<b>3,768.56</b>	<b>-50.9%</b>
6390AD · Penalties	26.00	1,423.05	-98.2%
6400AD · Postage and Delivery	712.20	798.41	-10.8%
6450AD · Printing and Reproduction	6,099.65	4,571.48	33.4%
6500AD · Professional Fees			
6501AD · Audit	51,200.00	20,000.00	156.0%
6510AD · Accounting	18,652.82	34,425.00	-45.8%
6520AD · Computer hardware/software	658.00	3,125.00	-78.9%
6530AD · Legal	6,225.00	3,800.00	63.8%
6500AD · Professional Fees - Other	2,319.85	1,482.39	56.5%
<b>Total 6500AD · Professional Fees</b>	<b>79,055.67</b>	<b>62,832.39</b>	<b>25.8%</b>
6600AD · Supplies			
6610AD · Program	8,259.32	9,105.63	-9.3%
6620AD · Office	5,168.75	6,250.70	-17.3%
6630AD · Office Equipment	1,508.36	825.27	82.8%
6640AD · Software	20,961.96	21,053.36	-0.4%
6600AD · Supplies - Other	7,708.17	5,282.55	45.9%
<b>Total 6600AD · Supplies</b>	<b>43,606.56</b>	<b>42,517.51</b>	<b>2.6%</b>
66900 · Reconciliation Discrepancies	28.10	0.00	100.0%
6700AD · Subscriptions and Publications	476.35	429.55	10.9%
6960AD · Uncategorized Expense			
Reimbursement Clearing Account	-272.04	0.00	-100.0%
6960AD · Uncategorized Expense - Other	0.00	100.00	-100.0%
<b>Total 6960AD · Uncategorized Expense</b>	<b>-272.04</b>	<b>100.00</b>	<b>-372.0%</b>
<b>Total Expense</b>	<b>1,947,831.97</b>	<b>1,931,632.96</b>	<b>0.8%</b>
<b>Net Ordinary Income</b>	<b>-107,035.13</b>	<b>-114,422.02</b>	<b>6.5%</b>
<b>Other Income/Expense</b>			

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**Middle Way House Inc**  
**Profit & Loss Prev Year Comparison**  
 January through December 2023

Accrual Basis

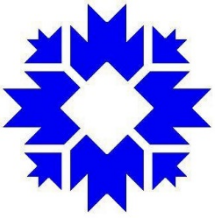
	Jan - Dec 23	Jan - Dec 22	% Change
<b>Other Income</b>			
702000 · Gain on Sale of Fixed Asset	300.00	0.00	100.0%
704000 · Other Income - Mortgage Release	0.00	81,377.00	-100.0%
705000 · ERTC Refund	156,013.21	0.00	100.0%
<b>Total Other Income</b>	156,313.21	81,377.00	92.1%
<b>Other Expense</b>			
520000 · Theft/Loss	2,871.05	0.00	100.0%
542500 · Depreciation Expense	157,150.00	157,920.38	-0.5%
<b>Total Other Expense</b>	160,021.05	157,920.38	1.3%
<b>Net Other Income</b>	-3,707.84	-76,543.38	95.2%
<b>Net Income</b>	<b>-110,742.97</b>	<b>-190,965.40</b>	<b>42.0%</b>

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**Middle Way House Inc**  
**Statement of Cash Flows**  
 January through December 2023

	<b>Jan - Dec 23</b>
<b>OPERATING ACTIVITIES</b>	
Net Income	-110,742.97
Adjustments to reconcile Net Income to net cash provided by operations:	
120000 · Accts Rec:122000 · PERM HOUSING - Accts Recv	-1,125.00
120000 · Accts Rec:123000 · GRANTS - Accts Recv	161,997.04
120000 · Accts Rec:125000 · RELATED PARTIES - Accts Recv	-203,350.07
200000 · Accounts Payable	-20,749.22
222100 · Payroll Liabilities	334.76
222100 · Payroll Liabilities:Garnishments Payable	100.00
222100 · Payroll Liabilities:220500 · Accrued Wages Payable	-19,481.55
222100 · Payroll Liabilities:222500 · Employee WH Dental/Vision	523.51
222100 · Payroll Liabilities:224100 · Indiana Unemployment	-1,994.70
222100 · Payroll Liabilities:227001 · State and Local WH	719.18
Net cash provided by Operating Activities	-193,769.02
<b>INVESTING ACTIVITIES</b>	
150000 · Furniture & Equipment:153000 · Furniture and Fixtures	-3,811.96
160000 · Accumulated Depreciation	157,150.00
180000 · Investments:181000 · Mutual Funds - VG Social Index	-9,046.10
180000 · Investments:183000 · Certificates of Deposit	75,731.82
Net cash provided by Investing Activities	220,023.76
Net cash increase for period	26,254.74
Cash at beginning of period	246,309.01
Cash at end of period	<b>272,563.75</b>

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**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

---

**Lead Agency Name:** Monroe County Humane Association

**Address:**

791 S Fieldstone Blvd Bloomington, IN 47403
--

**Phone:** 812-333-6242

**E-Mail:** mcha@monroehumane.org

**Website:** monroehumane.org

**President of Board of Directors:** Sue Allmon

**Name of Executive Director:** Andrew Krebbs

**Phone:** 205-541-6098

**E-Mail:** akrebbs@monroehumane.org

**Name of Grant Writer:** Andrew Krebbs

**Phone:** 205-541-6098

**E-Mail:** akrebbs@monroehumane.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
9	6	20+

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Monroe County Humane Association strives to advance animal welfare, deepen human-animal bonds, and extend accessible veterinary care and humane education across our community. This mission comes to life through the relentless efforts of our dedicated staff, volunteers, and generous supporters, ensuring every animal experiences the dignity and care they rightfully deserve.

## PROJECT INFORMATION

---

Name of the project to be funded:

Accessible Veterinary Care for Low Income Families

Total cost of project: \$115,414.00

Requested amount of Jack Hopkins funding: \$10,508.75

Number of City residents to be served by this project in 2024: 1,499

Number of clients to be served by this project in 2024: 2,306

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$10,508.75 to subsidize accessible veterinary care for 175 Bloomington pets at \$60.05 per pet. Monroe County Humane Association's (MCHA) nonprofit veterinary clinic stands as a vital resource in Monroe County, addressing the pressing need for accessible veterinary care among pets whose owners are struggling financially. The overwhelming demand for our services is evidenced by waitlists, often 6-8 weeks.

In 2023, we provided \$115,414 in subsidized care to 2,306 pets, 1,499 were pets living within Bloomington city limits, highlighting the critical nature of our work. All of these families live at or below 150% of the federal poverty line, underscoring the essential role our subsidized services play in the community. In addition, 336 of our subsidized pet families also received food assistance through the Food & Supply Pantry Program.

Our request aims to directly bolster this subsidized program, enabling us to maintain and expand our reach for critical veterinary services and bolster our food assistance program. By making veterinary care more accessible, we not only address immediate health needs but also prevent pets from being surrendered to our already overstretched shelter due to their owners' inability to afford costly medical care.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

791 S. Fieldstone Blvd  
Bloomington, IN 47403

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A



# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

MCHA has applied for and expects other grant support in the amount of \$36,000 from local and national agencies. These pending requests include Tri Kappa, UDWI, Grey Muzzle, Petco, and Petsmart. Funding is expected throughout the year and will be supplemented by operating funds until received.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Upon receiving a grant, MCHA will promptly request the full awarded amount once the funds are accessible. Additionally, MCHA will adhere to all necessary reporting standards and requirements.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

MCHA anticipates receiving other grant funds throughout the second and third quarter of 2024.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

The Monroe County Humane Association (MCHA) will leverage other resources by supplementing its operational funds with \$36,000 in anticipated grants from Tri Kappa, UDWI, Grey Muzzle, Petco, Banfield, and PetSmart. These grants are pending and expected throughout the year. Additionally, the project will utilize the dedicated efforts of over 20 volunteers to help reduce operational costs and extend its reach within the community.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Heartworm/Flea/Tick/Parasite Prevention	\$2,101.75
Priority #2	Medications	\$2,207.00
Priority #3	Vaccinations	\$1,681.00
Priority #4	Laboratory & Diagnostic Services	\$1,471.00
Priority #5	Radiology/Xrays	\$1,051.00
Priority #6	Medical Examinations	\$1,156.00
Priority #7	Spay/Neuter Surgery & Humane Euthanasia	\$841.00
<b>Total Requested</b>		<b>\$10,508.75</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The program serves pets and their families who are financially disadvantaged, particularly those living at or below 150% of the federal poverty line. This demographic represents a significant portion of our client base, with 84% of our clients falling within this socio-economic bracket. The economic constraints faced by these families often lead to delayed or foregone veterinary care, exacerbating health issues for pets and contributing to higher rates of pet abandonment or surrender to shelters.

Specifically, this program supports pets in low-income families, pets with older owners on fixed incomes, and pets whose owners are temporarily unemployed or underemployed.

Because of this grant, MCHAs Accessible Community Veterinary Clinic team of two associate veterinarians, two volunteer veterinarians, five veterinary technicians, and two support office assistants will deliver exceptional care to more than 175 Bloomington cats and dogs at \$60.05 per animal for a range of health services. These include parasite prevention, vaccinations, x-rays, diagnostic services, spay/neuter surgery, medications, examinations, and humane euthanasia/cremation.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Monroe County Humane Association (MCHA) enhances its financial stability through diverse fundraising activities, strategic partnerships, and grants from various sources, including local government, foundations, and corporations. Engaging the community through events and donation drives, alongside securing grants and encouraging planned giving, ensures continuous support for its services. Corporate partnerships also contribute by providing financial and in-kind support, ensuring MCHA's capacity to offer vital services to the community. This multifaceted approach enables long-term sustainability and maximizes the impact on animal welfare.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

This project will have broad and long-lasting benefits for the community by providing subsidized veterinary care and food assistance for pets belonging to families facing financial hardships. This initiative aims to address immediate health needs, prevent pets from being surrendered to shelters due to financial inability to afford medical care, and maintain the crucial bond between pets and their owners. By ensuring pets and their owners receive the support needed to thrive together, the project not only promotes animal health but also contributes to the welfare and cohesion of the entire community.

Additionally, by ensuring pets receive necessary veterinary care, the project will positively impact public health. Preventive care and vaccinations for pets reduce the risk of zoonotic diseases, which can be transmitted from animals to humans. By addressing the veterinary needs of pets within financially strained households, the initiative not only improves the health and well-being of the animals but also protects the community at large from potential health risks associated with untreated pet illnesses. This comprehensive approach reinforces the project's commitment to fostering a healthier environment for all community members.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Success will be evaluated through a multi-faceted approach. Quantitatively, achieving or surpassing our target of aiding 175 Bloomington cats & dogs through this grant. Qualitatively, we will collect pet owner feedback to assess the positive impact on their pets' health and wellbeing. Furthermore, we expect a decrease in preventable diseases among pets and a reduction in the number surrendered to the Bloomington Animal Shelter due to financial barriers in accessing veterinary care. These measures will provide a comprehensive view of the project's effectiveness and its contribution to animal welfare in the community.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

MCHA boasts numerous tales of cats and dogs in dire need of veterinary care, providing essential veterinary care when they have nowhere else to turn. A recent testament to our impact is the story of "Bunny," a three-year-old pitbull mix, who arrived at our doorstep burdened with advanced heartworm and a tick-borne disease, conditions previously identified at a different clinic. Facing prohibitive costs at the original clinic, her owner discovered our subsidized care program and reached out to us. We promptly began treating Bunny's heartworm disease and tick related illness, providing a cost-effective solution for her owner. Our team looks forward to Bunny's full recovery over the next few months, eagerly anticipating her return to a life filled with joy and activity. Without our intervention, Bunny's outlook would have been grim, underscoring the lifesaving impact of our program on pets like her.

In yet another heartwarming story of resilience and care, Willow, a young German Shepherd, was brought to the MCHA Clinic facing a dire situation. Willow suffered from a rapidly worsening wound, suspected to be the result of a spider bite. Her arrival at our clinic in late November came after her owners were met with prohibitively expensive treatment options elsewhere. Undeterred by the challenge, our dedicated veterinary team promptly put Willow on an aggressive treatment regimen, which included multiple medications and bi-weekly sessions of pressurized wound flushing. Willow's journey to recovery is nothing short of remarkable, demonstrating an incredible spirit of resilience. Her wound has now completely healed, a testament to the effective treatment and care provided by our team. Willow's story not only highlights the critical importance of timely and accessible veterinary care but also serves as a powerful reminder of the potentially life-threatening consequences that can be averted through our intervention.

The tales of Bunny and Willow are but a glimpse into the thousands of lives transformed by MCHA's subsidized veterinary care program. More than a medical facility, MCHA's veterinary clinic plays a pivotal role in not just addressing the health concerns of pets but in preserving the cherished bonds between them and their families. Our efforts extend beyond treatment; they ensure that financial constraints do not sever the deep connections between pets and their owners, keeping families whole.

MCHA has established a robust network of partnerships to support its mission of expanding access to veterinary care. Among its many confirmed partners are Bloomington Animal Care and Control, PetsAlive, and Wildcare. These collaborations enhance MCHA's ability to provide comprehensive animal welfare services, from spay/neuter programs with PetsAlive to wildlife rescue with Wildcare, and broader animal welfare efforts alongside Bloomington Animal Care and Control.

## 2024 Proposed Project Budget

Monroe County Humane Association	Subsidized Veterinary Care for Low Income Families		
Total Project Cost	\$115,414		
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
<b>JHSS Grant</b>	\$10,508.75		\$10,508.75
Other Grants	\$36,000		
Other Income Sources	\$68,905.25		
<b>TOTAL PROJECT FUNDS</b>	<b>\$115,414</b>		
<b>EXPENSES</b>			
Heartworm/Parasite Prevention	\$23,082.80	\$20,981.05	\$2,101.75
Medications	\$24,236.94	\$22,029.94	\$2,207.00
Vaccinations	\$18,466.24	\$16,785.24	\$1,681.00
Lab/Diagnostic Services	\$16,157.96	\$14,686.96	\$1,471.00
Radiology/Xrays	\$11,541.40	\$10,490.40	\$1,051.00
Medical Examinations	\$12,695.54	\$11,539.54	\$1,156.00
Spay/Neuter&Humane Euthanasia	\$9,233.12	\$8,393.12	\$841.00
<b>TOTAL PROJECT EXPENSES</b>	<b>\$115,414</b>	<b>\$104,905.25</b>	<b>\$10,508.75</b>

# Monroe County Humane Association

## Statement of Activity

January - December 2023

	TOTAL
Revenue	
4010 Clinic Services	357,750.47
4015 Online Pharmacy Income	55,622.92
4030 Crisis Housing Center	5,805.00
4040 Pantry	5,597.00
4400 Programming	
4420 Therapy Animal Program (TAP)	
4420.05 Fees/Evaluations	375.00
<b>Total 4420 Therapy Animal Program (TAP)</b>	<b>375.00</b>
<b>Total 4400 Programming</b>	<b>375.00</b>
4500 Annual Fund Income	
4510 Direct Mail	
4510.05 Prior Year Solicitation	3,075.00
4510.10 2023 - Roscoe	16,853.00
4510.15 2023 - Sandy	12,342.00
4510.20 New ED Mailing	14,790.00
4510.25 2023 - Christmas Cat	20,630.50
4510.50 Email Solicitation	1,783.50
<b>Total 4510 Direct Mail</b>	<b>69,474.00</b>
4520 Tails on The Town	
4520.05 Ticket Sales/Income	14,800.00
4520.10 Fund-an-Item	22,500.00
4520.20 Silent Auction	12,009.00
4520.25 Live Auction	7,275.00
4520.40 Event Income	3,389.00
4520.50 Corporate Sponsors	7,600.00
4520.60 Monetary Support	1,930.00
<b>Total 4520 Tails on The Town</b>	<b>69,503.00</b>
4530 Run for the Animals	
4530.10 Registration	5,916.50
4530.50 Corporate Sponsors	9,665.00
4530.70 Run for the Animals Raffle	238.00
4530.80 Run for the Animals Donation	863.00
4530.90 Run for the Animals Retail	170.00
<b>Total 4530 Run for the Animals</b>	<b>16,852.50</b>
4540 Fundraising Events	
4540.05 Facebook - MCHA - Christmas	2,087.64
4540.10 MCHA Yard Sale	2,434.36
<b>Total 4540 Fundraising Events</b>	<b>4,522.00</b>
4545 Third Party Benefits	14,006.92
4550 Board Giving	2,878.00

# Monroe County Humane Association

## Statement of Activity

January - December 2023

	TOTAL
4556 Recurring Giving Program	8,749.91
4558 Giving Tuesday	8,621.13
<b>Total 4500 Annual Fund Income</b>	<b>194,607.46</b>
4560 Unsolicited Donations	
4560.10 Unsolicited - General	36,603.19
4560.15 Memoriam/Honorarium	18,532.50
4560.40 Facebook Donations	2,884.11
4560.80 Estate Giving	5,872.16
<b>Total 4560 Unsolicited Donations</b>	<b>63,891.96</b>
4700 Grants	
4700.05 Jack Hopkins Grant	5,174.28
4700.20 City of Bloomington	14,350.00
4700.30 Community Foundation	1,116.00
4700.40 Lil Bub's Fund	2,549.52
4700.90 Grants - Other	2,000.00
<b>Total 4700 Grants</b>	<b>25,189.80</b>
4800 MCHA Community Foundation Funds	
4800.05 Branch Fund for the MCHA (Jean Branch)	8,985.00
4800.10 Theodore H Appleton Fund	1,546.00
4800.15 Monroe County Association Fund	1,243.00
4800.90 MCHA CF Year End	-11,774.00
<b>Total 4800 MCHA Community Foundation Funds</b>	<b>0.00</b>
4900 Planned Giving	
4900.05 Judy Feldspausch by Comm Foundation	5,195.78
<b>Total 4900 Planned Giving</b>	<b>5,195.78</b>
4910 New Building / Naming	5,000.00
4915 Matching Gift	14,015.86
<b>Total Revenue</b>	<b>\$733,051.25</b>
<b>GROSS PROFIT</b>	<b>\$733,051.25</b>
Expenditures	
5000 Cost of Goods Sold	
5010 Med / Vax Clinic CODB	137,579.02
5015 Online Pharmacy	45,527.61
5040 Pantry Expenses	94.00
5050 Animal Care	591.79
5205 Tails on the Town Expense	
5205.10 Venue Charge	15,423.19
5205.70 Event Costs, TOTT	5,076.11
<b>Total 5205 Tails on the Town Expense</b>	<b>20,499.30</b>
5210 Run for the Animals Expense	5,368.65
5310 SNAP Program	2,920.00



# Monroe County Humane Association

## Statement of Activity

January - December 2023

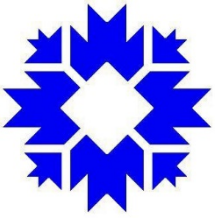
	TOTAL
5400 Grant Expenses	
5400.05 Grant Exp - City of Bloomington (\$2500)	2,115.00
5400.10 Grant Exp - Catalent (\$2000)	1,283.90
5400.15 Grant Exp - 100 Women	8,939.28
<b>Total 5400 Grant Expenses</b>	<b>12,338.18</b>
<b>Total 5000 Cost of Goods Sold</b>	<b>224,918.55</b>
6000 Salary and Payroll Expenses	
6010 Salary	
6010.10 Salary - Regular	304,465.03
6010.20 Salary - Overtime	1,315.08
6010.30 PTO	18,088.38
6010.40 Holiday	1,200.23
6010.80 HRA	7,141.05
6010.90 Staff Bonuses	8,350.00
6010.95 Other Pay	12,305.00
<b>Total 6010 Salary</b>	<b>352,864.77</b>
6020 Payroll Taxes	27,799.90
6025 Employee Insurance	3,779.03
6030 Retirement	1,122.23
6080 Staff Development	693.23
6090 Contract Employees	47,752.50
<b>Total 6000 Salary and Payroll Expenses</b>	<b>434,011.66</b>
7000 Office General Administrative	
7010 Advertising / Promotions	770.23
7020 Fundraising Expense	
7020.05 Direct Mail	7,220.46
7020.10 Fundraising Supplies	1,104.95
7020.20 Fundraising Postage	4,944.27
<b>Total 7020 Fundraising Expense</b>	<b>13,269.68</b>
7300 Professional Fees	10,350.00
7400 Credit Card Service Fees	
7400.05 Credit Fees Charged	1,834.89
7400.10 Credit Card Fees Donated	-563.02
<b>Total 7400 Credit Card Service Fees</b>	<b>1,271.87</b>
7500 Board Expenses	278.78
7510 CEO Expenses	347.89
7530 Auto Expense	37,445.70
7540 Supplies - Admin	266.88
7550 Computer/Technology	9,307.01
7600 Dues & Subscriptions	1,272.05
7650 Software	7,211.75
7700 Office Supplies	5,069.38

# Monroe County Humane Association

## Statement of Activity

January - December 2023

	TOTAL
7705 Postage	151.20
<b>Total 7000 Office General Administrative</b>	<b>87,012.42</b>
8000 Building - Facility Expenses	
8025 Business Insurance	20,500.00
8030 Interest Expense	33,742.06
8040 Utilities	
8040.05 Electric	7,663.00
8040.10 Water	1,723.81
8040.15 Gas	1,158.65
8040.20 Phone	9,009.71
<b>Total 8040 Utilities</b>	<b>19,555.17</b>
8050 Building Expenses	
8050.05 Building supplies	2,244.32
8050.10 Trash service	1,050.00
8050.15 Landscaping / Snow Removal	8,115.00
8050.20 Property Taxes	683.12
8050.30 Repair & Maintenance	4,336.89
<b>Total 8050 Building Expenses</b>	<b>16,429.33</b>
<b>Total 8000 Building - Facility Expenses</b>	<b>90,226.56</b>
Unapplied Cash Bill Payment Expense	0.00
<b>Total Expenditures</b>	<b>\$836,169.19</b>
<b>NET OPERATING REVENUE</b>	<b>\$ -103,117.94</b>
Other Revenue	
9000 Other Revenue & Expenses	
9005 Interest Income	4,235.65
9090 Other Income	6.95
9095 Insurance Proceeds	8,266.65
9100 Endowment Income & Expenses	
9105 Interest Earned - Endowment	24,351.05
9110 Dividend Income - Endowment	21,264.87
9130 Realized Gains (Losses) on Investments	44,325.06
9135 Investment Fees & Expenses	-21,470.84
9140 Unrealized Gain or Loss on Securities	232,919.34
<b>Total 9100 Endowment Income &amp; Expenses</b>	<b>301,389.48</b>
<b>Total 9000 Other Revenue &amp; Expenses</b>	<b>313,898.73</b>
<b>Total Other Revenue</b>	<b>\$313,898.73</b>
<b>NET OTHER REVENUE</b>	<b>\$313,898.73</b>
<b>NET REVENUE</b>	<b>\$210,780.79</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Monroe County United Ministries (MCUM)

**Address:** 827 W 14th Ct, Bloomington, IN 47404

**Phone:** 812-339-3429

**E-Mail:** mcum@mcum.org

**Website:** mcum.org

**President of Board of Directors:** Julie Beasley

**Name of Executive Director:** Katie Broadfoot

**Phone:** 812-339-3429 ext. 11

**E-Mail:** kbroadfoot@mcum.org

**Name of Grant Writer:** Camden Hill

**Phone:** 812-339-3429 ext. 16

**E-Mail:** chill@mcum.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
31	0	48

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Established in 1939, Monroe County United Ministries' mission is to create lasting solutions to economic, educational, and social injustice through quality programs, collaboration, and innovation. Our vision is to end generational poverty for the people we serve. Our Compass Early Learning Center (Compass) and Self-Sufficiency Center (SSC) work together to address the root causes of generational poverty in our community, and we empower low-income families in Bloomington to break the cycle of poverty through assistance with basic and financial needs, economic mobility mentoring, and affordable high-quality early learning.

# PROJECT INFORMATION

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Name of the project to be funded:

Facility Renovations to Enhance Programmatic and Organizational Capacity

Total cost of project: \$381,000

Requested amount of Jack Hopkins funding: \$50,000

Number of City residents to be served by this project in 2024: 150

Number of clients to be served by this project in 2024: 250

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Monroe County United Ministries is requesting \$50,000 to fund a critical renovation to our Administration/Self-Sufficiency Center building. Consisting primarily of an outdated and underutilized gym space, this portion of the building has been minimally updated since its construction in the 1970s and does not meet the current needs of the agency. In its place, we intend to construct private 1-on-1 meeting rooms, office space, and a small conference room, all of which will enhance the capacity of our programs. These renovations are part of a larger initiative within MCUM to further integrate our services to deepen the impact we have on low-income families with young children.

With a renovated space, we will be able to significantly expand our economic mobility mentoring program to include all families attending our Compass Early Learning Center at the subsidized rate. Furthermore, this renovation will improve the operations of the Self-Sufficiency Center by centralizing its staff within the building, and expand our capacity to offer private, 1-on-1 meetings between program participants and staff. Lastly, given our current lack of suitable office space, the offices included in this renovation will allow for future agency growth and the hiring of additional qualified personnel.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

The project will take place at our primary address, 827 W 14th Ct, Bloomington, IN 47404.

**Do you own or have site control of the property at which the project is to take place?**

Yes

No

N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Monroe County United Ministries owns the property and building where this project will take place.

**Is the property zoned for your intended use?**

Yes

No

N/A

If "no," please explain:

The property is zoned for its intended use.

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

Given that we own the property and it is currently zoned for its intended use, this project does not require additional permits, variances, or other forms of approval.

# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Pending: United Way Capital Improvement Matching Funds – \$191,000 (see additional comments)  
Confirmed: Portion of CDBG Physical Improvements – \$29,601.17  
Confirmed: Smithville Foundation – \$9,475.00  
Pending: Early Years Initiative – \$101,000  
Pending: Jack Hopkins Social Services – \$50,000

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We have worked with Weddle Bros. to estimate the cost of the renovations, and they have given us a project quote of \$381,000. Once all necessary funding has been confirmed, we will move forward with formally contracting Weddle Bros. to conduct the renovations. Once the project is complete, we will submit our claim for reimbursement.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

We are well on our way to securing all necessary funding sources for this project. In addition to confirmed funding and our request from Jack Hopkins, we intend to request support from the Early Years Initiative, a funding opportunity offered by Early Learning Indiana. Funding decisions for this initiative will be announced September 30th, 2024.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

MCUM is committed to completing this crucial renovation to our facilities to enhance our capacity to serve the economically marginalized of Bloomington. Our primary partner in this project is the United Way of South Central Indiana, which we have been working closely with to secure matching funds of \$191,000. Thus, funding from Jack Hopkins would ultimately be leveraged to cover over a quarter of the total project cost. Furthermore, the enhanced programmatic and organizational capacity from this renovation will deepen our impact on the people we serve, making our case for support from funders stronger than ever.



## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Renovation Project	\$381,000
Priority #2	N/A (see additional comments)	
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$381,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

According to data from the United for ALICE Research Center, asset-limited, income-constrained, and employed (ALICE) families represent one in four households in Bloomington. ALICE households are those that make more than the Federal Poverty Level but not enough to meet their basic needs as defined by the Household Survival Budget. The significant proportion of hard-working families in Bloomington that still struggle to make ends meet indicates the substantial need for services to support these families.

Our programs seek to meet that need. Through our Compass Early Learning Center, we provide high-quality early education at a subsidized rate to families making too much to qualify for state and federal childcare vouchers, but not enough to meet their basic needs without assistance. And now, with our renovated facility, we will have the capacity to enroll each of these families in our economic mobility mentoring program, Your Path. In turn, Your Path families have expanded access to direct material assistance. Funding from Jack Hopkins will increase our programmatic and organizational capacity to serve economically marginalized ALICE families through programs that address all three areas identified by the City's Anti-Poverty Strategy: education, earnings, and essentials.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

As a capital project, our request from Jack Hopkins represents a one-time, long-term investment in MCUM's future. The renovations to this space could easily serve MCUM for over fifty years, and in that time, the space will serve thousands of families and hold countless 1-on-1 economic mobility meetings. As we continue to hone our mission and services, investing in MCUM at this time is an opportunity for the City to play an invaluable role in our agency's future.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The primary long-term benefit of this project will be the expanded capacity and impact of our economic mobility mentoring program, Your Path. Through this project, we will be able to expand the program to all families at Compass Early Learning Center attending at the subsidized rate. Our long-term vision is to further integrate the services of the Self-Sufficiency Center, primarily Your Path and direct material assistance, into Compass' service model, such that we are comprehensively addressing the needs of the whole family.

The report "The Self-Sufficiency Standard for Indiana 2016" states "There are two basic approaches to closing the income gap between low wages and what it really takes to make ends meet: reduce costs or raise incomes." By providing affordable early learning and direct material assistance, we reduce the expenses of the households we serve. And, as adults set short- and long-term goals in the areas of family stability, well-being, financial management, education, and employment, they improve their financial situation and create a home environment that preserves the cognitive, health, and social-emotional benefits of high-quality early education. In short, this project will serve to lift this generation and the next out of poverty, one family at a time.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

- Number of new families enrolled in the Your Path program
- Number of 1-on-1 economic mobility meetings held
- Number of community education events held in new meeting space
- Number of goals made and met by new Your Path participants
- Number of additional program staff hired

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Because this project is vital to the success of the expanded Your Path program, MCUM is committed to securing the necessary funding to see this project through to completion. Our executive director, Katie Broadfoot, has been working closely with the United Way of South Central Indiana (UWSCl) and we are close to confirming funding and drafting a funding agreement in which they will match up to half of the project cost, or \$191,000. While technically the status of this funding is pending, UWSCl and MCUM share mutual confidence in our commitment and ability to secure funding for this project. And, while we are not able to break the project down into smaller parts, MCUM intends to move forward with the project even if the Jack Hopkins Committee awards partial funding. To us, this does not represent the lack of need for this funding, on the contrary it represents our conviction in the necessity of the project. We are excited for the future of MCUM, and we are confident these renovations will allow us to serve our clients in an even more profound way.

# 2024 Proposed Project Budget Facility Updates

Monroe County United Ministries	PROJECT: MCUM Facility Update		
	TOTALS	OTHER INCOME	JHSS GRANT
<b>FUNDS</b>			
JHSS GRANT (Pending)			\$50,000
United Way Matched Funds (Pending)		\$191,000	
Smithville		\$9,475	
CDBG PI 2024		\$29,601	
Early Learning Initiative (Pending)		\$100,924	
<b>TOTAL PROJECT FUNDS</b>	<b>\$381,000</b>	<b>\$331,000</b>	<b>\$50,000</b>
<b>EXPENSES</b>			
Weddle Brothers Renovation Quote		\$381,000	
Design			
Supervision			
Demolition of 2200 sq ft interior space			
Installation			
Standard finishes			
<b>TOTAL PROJECT EXPENSES</b>	<b>\$381,000</b>	<b>\$331,000</b>	<b>\$50,000</b>



**WEDDLE BROS. BUILDING GROUP, LLC**  
*A Weddle Bros. Construction Company*  
100% Employee Owned

Monday February 19<sup>th</sup>, 2024

Katie Broadfoot  
Executive Director  
Monroe County United Ministries  
Main Building Renovation  
(812) 339-3429 ext. 11

RE: MCUM Interior Renovation & Expansion

Dear Katie,

Weddle Bros. Building Group, LLC has constructed a budget to include labor, material, equipment, and supervision for the scope defined as per narrative below.

In general, the work includes:

1. \$50,000 dollar allowance for design
2. Permits
3. Supervision
4. Demolition of existing 2200 square foot interior space (renovation)
5. Installation of new offices in allotted 2200 square foot interior space (renovation)
6. Installation of new 1800 square foot event space (new construction)
7. New construction to match existing exteriors finishes
8. Standard finishes throughout renovation and new construction

This Budget Excludes:

1. Structural modifications to existing building
2. Asbestos testing & mitigation
3. Extensive electrical panel rework
4. Furniture is to be provided by the owner.
5. Materials Testing.
6. Engineering.

<u>Budget</u>	<b>2200 SF Renovation</b>	<b>\$381,000.00</b>	-----	<b>Three Hundred Eighty-One Thousand Dollars</b>
	<b>1800 SF New Build</b>	<b>\$487,000.00</b>	-----	<b>Four Hundred Eighty-Seven Thousand Dollars</b>

Weddle Bros. thanks you for the invitation to work with you on this project.

Please contact us if you have any questions or would like to review scope. We can be reached via phone at (812) 345-0371 or via email at [jjenkins@weddlebros.com](mailto:jjenkins@weddlebros.com)

Thank you,  
Weddle Bros. Building Group, LLC

Justin Jenkins

# **MONROE COUNTY UNITED MINISTRIES, INC.**

## **FINANCIAL STATEMENTS**

**DECEMBER 31, 2023 AND 2022**

*CPAs / ADVISORS*



**MONROE COUNTY UNITED MINISTRIES, INC.**

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DECEMBER 31, 2023 AND 2022

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Blue & Co., LLC / 813 West Second Street / Seymour, IN 47274  
main 812.522.8416 website blueandco.com

## REPORT OF INDEPENDENT AUDITORS

Board of Directors  
Monroe County United Ministries, Inc.  
Bloomington, Indiana

### Opinion

We have audited the accompanying financial statements of Monroe County United Ministries, Inc. (the "MCUM"), a nonprofit organization, which comprise the statements of financial position as of December 31, 2023 and 2022, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of MCUM as of December 31, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of MCUM and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about MCUM's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

## Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is substantial likelihood that, individually or in the aggregate, they would influence the judgement made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of MCUM's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about MCUM's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

*Blue & Co., LLC*

Seymour, Indiana

March 14, 2024

# MONROE COUNTY UNITED MINISTRIES, INC.

## STATEMENTS OF FINANCIAL POSITION DECEMBER 31, 2023 AND 2022

### ASSETS

	2023	2022
Cash and cash equivalents	\$ 212,218	\$ 563,324
Restricted cash	19,305	8,336
Certificate of deposit	103,233	-0-
Vouchers and fees receivable	63,261	64,987
Grants receivable	234,909	21,599
Investments	844,594	742,516
Prepaid expenses	11,632	10,404
Beneficial interest in assets held by others	369,794	337,515
Property and equipment, net	<u>1,046,565</u>	<u>1,020,807</u>
	<u>\$ 2,905,511</u>	<u>\$ 2,769,488</u>

### LIABILITIES AND NET ASSETS

Liabilities		
Accounts payable	\$ 17,263	\$ 30,659
Accrued expenses	83,997	82,630
Assets held for others	<u>19,299</u>	<u>8,330</u>
Total liabilities	120,559	121,619
Net assets		
Without donor restrictions		
Undesignated	1,295,285	1,471,804
Board designated endowment	<u>946,303</u>	<u>833,141</u>
	2,241,588	2,304,945
With donor restrictions		
Restricted for specified purpose	275,279	96,034
Restricted for endowment	<u>268,085</u>	<u>246,890</u>
	<u>543,364</u>	<u>342,924</u>
Total net assets	<u>2,784,952</u>	<u>2,647,869</u>
	<u>\$ 2,905,511</u>	<u>\$ 2,769,488</u>

See accompanying notes to financial statements.

**MONROE COUNTY UNITED MINISTRIES, INC.**

STATEMENTS OF ACTIVITIES  
YEAR ENDED DECEMBER 31, 2023  
(WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	2023			2022
	Without Donor Restrictions	With Donor Restrictions	Total	Total
<b>Support and revenues</b>				
Contributions	\$ 354,190	\$ 275,279	\$ 629,469	\$ 472,087
Childcare and preschool vouchers and scholarships	736,310	-0-	736,310	765,736
Grants	221,765	-0-	221,765	659,459
Childcare fees	180,529	-0-	180,529	155,779
Investment return, net	106,241	-0-	106,241	(103,193)
Change in value of beneficial interest in assets held by others, net	15,128	28,928	44,056	(45,738)
Miscellaneous income	4,780	-0-	4,780	16,318
Net assets released from restrictions	<u>103,767</u>	<u>(103,767)</u>	<u>-0-</u>	<u>-0-</u>
Total support, gains, and other revenue	1,722,710	200,440	1,923,150	1,920,448
<b>Expenses</b>				
Program services				
Preschool and childcare	1,219,380	-0-	1,219,380	959,804
Emergency services	<u>244,567</u>	<u>-0-</u>	<u>244,567</u>	<u>192,754</u>
Total program services	1,463,947	-0-	1,463,947	1,152,558
Management and general	190,956	-0-	190,956	362,397
Fundraising	<u>131,164</u>	<u>-0-</u>	<u>131,164</u>	<u>113,041</u>
Total expenses	<u>1,786,067</u>	<u>-0-</u>	<u>1,786,067</u>	<u>1,627,996</u>
Change in net assets	(63,357)	200,440	137,083	292,452
<b>Net assets, beginning of year</b>	<u>2,304,945</u>	<u>342,924</u>	<u>2,647,869</u>	<u>2,355,417</u>
<b>Net assets, end of year</b>	<u>\$ 2,241,588</u>	<u>\$ 543,364</u>	<u>\$ 2,784,952</u>	<u>\$ 2,647,869</u>

See accompanying notes to financial statements.

**MONROE COUNTY UNITED MINISTRIES, INC.**

STATEMENT OF ACTIVITIES  
YEAR ENDED DECEMBER 31, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
<b>Support and revenues</b>			
Contributions	\$ 389,246	\$ 82,841	\$ 472,087
Childcare and preschool vouchers and scholarships	765,736	-0-	765,736
Grants	659,459	-0-	659,459
Childcare fees	155,779	-0-	155,779
Investment return, net	(103,193)	-0-	(103,193)
Change in value of beneficial interest in assets held by others, net	(15,704)	(30,034)	(45,738)
Miscellaneous income	16,318	-0-	16,318
Net assets released from restrictions	139,920	(139,920)	-0-
Total support, gains, and other revenue	2,007,561	(87,113)	1,920,448
<b>Expenses</b>			
Program services			
Preschool and childcare	959,804	-0-	959,804
Emergency services	192,754	-0-	192,754
Total program services	1,152,558	-0-	1,152,558
Management and general	362,397	-0-	362,397
Fundraising	113,041	-0-	113,041
Total expenses	1,627,996	-0-	1,627,996
Change in net assets	379,565	(87,113)	292,452
<b>Net assets, beginning of year</b>	1,925,380	430,037	2,355,417
<b>Net assets, end of year</b>	\$ 2,304,945	\$ 342,924	\$ 2,647,869

See accompanying notes to financial statements.

**MONROE COUNTY UNITED MINISTRIES, INC.**

STATEMENTS OF FUNCTIONAL EXPENSES  
 YEAR ENDED DECEMBER 31, 2023  
 (WITH COMPARATIVE TOTALS FOR THE YEAR ENDED DECEMBER 31, 2022)

	2023						2022
	Program Services			Management and General	Fundraising	Total	Total
	Preschool and Childcare	Emergency Services	Total				
Salaries and wages	\$ 804,818	\$ 145,330	\$ 950,148	\$ 101,270	\$ 85,643	\$ 1,137,061	\$ 977,201
Employee benefits	102,956	21,191	124,147	16,939	10,305	151,391	129,856
Total salaries, wages, and employee benefits	907,774	166,521	1,074,295	118,209	95,948	1,288,452	1,107,057
Advertising	1,771	3,561	5,332	-0-	1,110	6,442	18,801
Supplies and expendables	2,107	219	2,326	2,552	299	5,177	5,330
Transportation and vehicles	72	1,734	1,806	463	1,161	3,430	383
Food, paper and crafts	75,723	7,626	83,349	-0-	-0-	83,349	66,245
Utilities and telephone	28,315	2,138	30,453	1,372	2,170	33,995	37,066
Printing	-0-	508	508	58	1,011	1,577	776
Insurance	14,426	2,460	16,886	6,201	981	24,068	20,220
Professional services	-0-	-0-	-0-	22,283	4,459	26,742	25,190
Repairs and maintenance	76,521	12,685	89,206	7,985	4,621	101,812	119,347
Postage and shipping	-0-	-0-	-0-	2,032	-0-	2,032	2,393
Events	410	45	455	-0-	6,784	7,239	11,325
Emergency grants	-0-	27,541	27,541	-0-	-0-	27,541	37,310
CARES stipends, scholarships and other grants	14,721	-0-	14,721	-0-	-0-	14,721	31,227
Depreciation	85,486	12,403	97,889	25,895	6,608	130,392	108,105
Training and staff development	550	4,539	5,089	1,997	5,910	12,996	24,937
Rent	-0-	651	651	-0-	-0-	651	212
Miscellaneous	11,504	1,936	13,440	1,909	102	15,451	12,072
	<u>\$ 1,219,380</u>	<u>\$ 244,567</u>	<u>\$ 1,463,947</u>	<u>\$ 190,956</u>	<u>\$ 131,164</u>	<u>\$ 1,786,067</u>	<u>\$ 1,627,996</u>

See accompanying notes to financial statements.

**MONROE COUNTY UNITED MINISTRIES, INC.**

STATEMENT OF FUNCTIONAL EXPENSES  
YEAR ENDED DECEMBER 31, 2022

	Program Services			Management and General	Fundraising	Total
	Preschool and Childcare	Emergency Services	Total			
Salaries and wages	\$ 637,197	\$ 104,917	\$ 742,114	\$ 149,079	\$ 86,008	\$ 977,201
Employee benefits	80,923	9,725	90,648	28,049	11,159	129,856
Total salaries, wages, and employee benefits	718,120	114,642	832,762	177,128	97,167	1,107,057
Advertising	14,217	58	14,275	1,500	3,026	18,801
Supplies and expendables	1,908	203	2,111	2,888	331	5,330
Transportation and vehicles	191	68	259	124	-0-	383
Food, paper and crafts	54,648	11,597	66,245	-0-	-0-	66,245
Utilities and telephone	31,624	2,253	33,877	1,382	1,807	37,066
Printing	4	106	110	577	89	776
Insurance	-0-	77	77	20,143	-0-	20,220
Professional services	-0-	-0-	-0-	21,897	3,293	25,190
Repairs and maintenance	94,170	13,376	107,546	7,050	4,751	119,347
Postage and shipping	-0-	-0-	-0-	2,393	-0-	2,393
Events	2,680	3,449	6,129	2,879	2,317	11,325
Emergency grants	-0-	37,310	37,310	-0-	-0-	37,310
CARES stipends, scholarships and other grants	27,946	265	28,211	2,831	185	31,227
Depreciation	-0-	-0-	-0-	108,105	-0-	108,105
Training and staff development	7,570	7,547	15,117	9,820	-0-	24,937
Rent	-0-	212	212	-0-	-0-	212
Miscellaneous	6,726	1,591	8,317	3,680	75	12,072
	<u>\$ 959,804</u>	<u>\$ 192,754</u>	<u>\$ 1,152,558</u>	<u>\$ 362,397</u>	<u>\$ 113,041</u>	<u>\$ 1,627,996</u>

See accompanying notes to financial statements.

**MONROE COUNTY UNITED MINISTRIES, INC.**

STATEMENTS OF CASH FLOWS  
YEARS ENDED DECEMBER 31, 2023 AND 2022

	2023	2022
<b>Operating activities</b>		
Change in net assets	\$ 137,083	\$ 292,452
Adjustments to reconcile change in net assets to cash provided by operating activities		
Depreciation	130,392	108,105
Interest earned on certificate of deposit	(3,233)	-0-
Reinvested interest and dividends	(22,430)	(12,920)
Realized and unrealized loss (gain) on investments, net	(90,257)	110,306
Change in value of the beneficial interest in assets held by others	(44,056)	45,738
Changes in operating assets and liabilities:		
Vouchers and fees receivable	1,726	(17,788)
Grants receivable	(213,310)	(19,099)
Prepaid expenses	(1,228)	(1,833)
Accounts payable	(13,396)	13,314
Accrued expenses	1,367	13,262
Assets held for others	10,969	(4,430)
Net cash flows from operating activities	(106,373)	527,107
<b>Investing activities</b>		
Purchases of property and equipment	(156,150)	(206,762)
Purchases of certificate of deposit	(100,000)	-0-
Purchases of investments	(230,464)	(614,728)
Proceeds on sale of investments	241,073	320,779
Contributions to assets held by others	-0-	(110,000)
Distributions from assets held by others	11,777	10,688
Net cash flows from investing activities	(233,764)	(600,023)
<b>Financing activities</b>		
Principal payments on finance lease liability	-0-	(1,037)
Net change in cash	(340,137)	(73,953)
<b>Cash and cash equivalents and restricted cash, beginning of year</b>	571,660	645,613
<b>Cash and cash equivalents and restricted cash, end of year</b>	\$ 231,523	\$ 571,660

*See accompanying notes to financial statements.*



# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

---

### 1. NATURE OF OPERATIONS AND SIGNIFICANT ACCOUNTING POLICIES

#### Nature of Operations

Monroe County United Ministries, Inc. (MCUM) was incorporated as a not-for-profit organization under the laws of the State of Indiana. MCUM provides childcare and nutritional assistance to low-income families. MCUM also provides emergency services to crisis victims. These services are provided to residents of Bloomington, Indiana and Monroe County. MCUM relies on contributions, fees for services, government funding, and other sources of support and revenue to carry out its programs.

#### Basis of Presentation

The accompanying financial statements have been prepared on the accrual basis, and have been prepared with a focus on the entity as a whole. Net assets, support, revenues, gains, and losses are classified based on the existence or absence of donor restrictions. Accordingly, the net assets of MCUM are classified and reported as follows:

Net assets without donor restrictions: Net assets that are currently available for operating purposes under the direction of the board or designated by the board for specific use.

*Undesignated* – used to fund current operations of MCUM

*Board designated endowment* – established with the expectation that the principal be maintained in perpetuity to generate grants, subject to the spending policy, used to support the general operations of MCUM as designated by the board of directors (Board)

Net assets with donor restrictions: Net assets subject to donor stipulations for specific purposes or time restrictions. These include donor restrictions requiring the net assets be held in perpetuity or for a specified term to support operations or specific purposes. MCUM maintains net assets with donor restrictions as follows:

*Restricted for specified purposes* – all contributions to MCUM with the intention of the donor to be used for a specific program or purpose

*Restricted for endowment* – represents a transfer of donor-restricted funds to the Community Foundation of Bloomington and Monroe County, Inc. (CFBMC) with the intention of the donors that the assets be held in perpetuity and are being managed in accordance with CFBMC's spending policy

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### Management's Estimates

Management uses estimates and assumptions in preparing financial statements in accordance with accounting principles generally accepted in the United States of America. Those estimates and assumptions affect the reported amounts of assets and liabilities and the reported support, revenues and expenses. Actual results could vary from the estimates that were used.

### Cash, Cash Equivalents, and Restricted Cash

For the purposes of the statement of cash flows, MCUM considers all liquid investments with original maturities of three months or less when purchased to be cash equivalents, but excludes cash equivalents held by fund managers and included in the investment portfolio. Cash equivalents are carried at cost, which approximates market value, and consists of bank money market funds.

Restricted cash includes money held for the benefit of others and is also included as a liability on the Statements of Financial Position.

The following table provides a reconciliation of cash, cash equivalents, and restricted cash reported within the statements of financial position that sum to the total of the same such amounts shown in the statements of cash flows:

	<u>2023</u>	<u>2022</u>
Cash and cash equivalents	\$ 212,218	\$ 563,324
Restricted cash	<u>19,305</u>	<u>8,336</u>
Total cash, cash equivalents, and restricted cash	<u>\$ 231,523</u>	<u>\$ 571,660</u>

### Vouchers, Fees, and Grants Receivables

Vouchers receivable are stated at the allowable amount billed for childcare services as awarded by the State of Indiana. Vouchers receivable represents amounts due from performance-based service contracts once the services have been performed.

Fees receivable are stated at the amount billed for childcare and are due at the time the service is rendered. When an account becomes past due, efforts are made by management to collect and to establish repayment plans when necessary. When all attempts to establish a payment plan fail, or if repayment under the plan is not followed, the account is placed with an outside collection agency. No interest is charged on accounts past due.

Grants receivable are stated at the amount expected to be collected or reimbursed. Grants receivable represent unconditional grants awarded but not yet received and amounts due from cost-reimbursement grants once allowable costs have been incurred.

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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Management estimates an allowance for credit losses based on an evaluation of historical losses, current economic conditions, and financial stability of its grantors and families served. Management has determined that no allowance for vouchers, fees, or grants receivable is necessary at December 31, 2023 and 2022.

### Investments and Investment Return

Investments are carried at fair value for financial reporting purposes. Realized gains or losses upon the sale of investments are based on the cost of specifically identified securities. Changes in unrealized appreciation or depreciation of investments are reflected in the statements of activities in the period in which such changes occur. Interest and dividend income is recorded when earned.

### Beneficial Interest in Assets Held by Others

MCUM transferred assets to CFBMC to hold donor restricted gifts intended to be held in perpetuity and is the beneficiary of the fund holding those assets. MCUM receives an annual return on these assets in accordance with CFBMC's policy and undistributed earnings are retained by CFBMC. In 2022, MCUM transferred \$110,000 to CFBMC, which is not donor restricted; however, is intended by the Board to be held in perpetuity.

The fair value of this asset (beneficial interest in assets held by others) is included in the statements of financial position at \$369,794 and \$337,515 as of December 31, 2023 and 2022, respectively. The change in the value of the beneficial interest in assets held by others in the statement of activities includes realized and unrealized gains and losses and interest and dividends.

### Property and Equipment

Property and equipment are recorded at cost, if purchased, and at fair value at the date of donation, if donated. All land, buildings and improvements are capitalized. Equipment is capitalized if it has a useful life when acquired of more than one year. Repairs and maintenance that do not significantly increase the useful life of the asset are expensed as incurred. Depreciation is computed using the straight-line method over the estimated useful lives of the assets, which range from three to forty years.

### Assets Held for Others

MCUM administers the Individual Development Account (IDA) Program as developed by the Indiana Housing and Community Development Authority (IHCDA). IDAs are matched savings accounts that enable low to moderate-income individuals to save money and build financial assets for specified purposes. These accounts total \$19,299 and \$8,330 at December 31, 2023 and 2022 and are reported as restricted cash and assets held for others in the Statements of Financial Position.

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### Support and Revenue Recognition

Contributions, including unconditional promises to give, are recognized when received. All contributions are reported as increases in net assets without donor restrictions unless use of the contributed assets is specifically restricted by the donor. Amounts received that are restricted by the donor to use in future periods or for specific purposes are reported as increases in net assets with donor restrictions.

Unconditional promises with payments due in future years have an implied restriction to be used in the year the payment is due, and therefore are reported as net assets with donor restrictions until the payment is due unless the contribution is clearly intended to support activities of the current fiscal year or is to be used for a specific purpose. Conditional promises, including certain grants, are those with measurable performance or other barrier and right of return or release and are not recognized until all conditions on which they depend are substantially met.

Revenue funded by cost-reimbursement grants is recognized as MCUM incurs eligible expenses under the programs or agreements. Activities and expenses allocated to specific grants are subject to audit and acceptance by the granting agency and, as a result of such audit, adjustments could be required.

Childcare and preschool vouchers and scholarships and childcare fees are revenue from contracts with customers and are recognized over time as the childcare services are provided to customers. Vouchers and fees receivable (contract receivables) for the years ended December 31, 2023 and 2022 were as follows:

	<u>2023</u>	<u>2022</u>
Beginning of year	\$ 64,987	\$ 47,199
End of year	\$ 63,261	\$ 64,987

### In-Kind Contributions

MCUM periodically receives contributions in a form other than cash or investments. If MCUM receives a contribution of land, buildings, or equipment, the contributed asset is recognized as an asset at its estimated fair value at the date of the gift, provided that the value of the asset and its estimated useful life meets MCUM's capitalization policy.

MCUM benefits from personal services provided by a substantial number of volunteers. Those volunteers have donated significant amounts of time and services in MCUM's program operations, fundraising campaigns and various committee assignments. However, the contributed services do not meet the criteria for recognition in the financial statements and therefore no amount is recorded in the accompanying financial statements for those services. Accounting principles generally accepted in the United States of America allow for recognition

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# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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of contributed services when the services received create or enhance nonfinancial assets or require specialized skills possessed by the individuals providing the service and the service would typically need to be purchased if not donated.

MCUM pays for most services requiring specific expertise.

Donations of food, clothing, or other items, which are passed on directly to MCUM's consumers, are not valued or recorded.

### Functional Allocation of Expenses

The costs of providing the programs and services of MCUM have been summarized on a functional basis in the Statements of Activities. Accordingly, certain costs have been allocated among the various programs and supporting activities benefited.

The financial statements report certain categories of expenses that are attributable to one or more program or supporting functions of MCUM. Therefore, these expenses require allocation on a reasonable basis that is consistently applied. All expenses not directly benefiting a certain program are allocated based on estimates of time and usage by personnel and programs and the benefits derived. While the methods of allocation are considered appropriate, other methods could produce different results.

### Income Taxes

MCUM is organized as a not-for-profit corporation under Section 501(c)(3) of the United States Internal Revenue Code.

Accounting principles generally accepted in the United States of America require management to evaluate tax positions taken by MCUM and recognize a tax liability if MCUM has taken an uncertain position that more likely than not would not be sustained upon examination by various federal and state taxing authorities. Management has analyzed the tax positions taken by MCUM, and has concluded that as of December 31, 2023 and 2022, there are no uncertain positions taken or expected to be taken that would require recognition of a liability or disclosure in the accompanying financial statements. MCUM is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress.

As such, MCUM is generally exempt from income taxes. However, MCUM is required to file Federal Form 990 – Return of Organization Exempt from Income Tax which is an informational return only.

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### Subsequent Events

MCUM evaluates events occurring subsequent to the date of the financial statements in determining the accounting for and disclosure of transactions and events that affect the financial statements. Subsequent events have been evaluated through March 14, 2024 which was the date the financial statements were available to be issued.

### **2. CERTIFICATE OF DEPOSIT**

The certificate of deposit is recorded at cost plus accrued interest and totals \$103,233 at December 31, 2023. The certificate of deposit matures in May 2024 and earns interest at a rate of 4.50%. There were no certificates of deposit as of December 31, 2022.

### **3. INVESTMENTS**

Investments at December 31, 2023 and 2022, consist of the following:

	<u>2023</u>	<u>2022</u>
Cash	\$ 26,171	\$ 34,328
Equity mutual funds		
Large cap	301,721	294,238
Mid cap	48,628	50,202
Small cap	38,326	23,849
International	58,465	61,122
Fixed income mutual funds		
Short term	123,776	116,699
Intermediate term	186,714	162,078
Equity exchange traded funds		
Large cap	<u>60,793</u>	<u>-0-</u>
	<u>\$ 844,594</u>	<u>\$ 742,516</u>

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### 4. PROPERTY AND EQUIPMENT

Property and equipment include the following at December 31, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Land	\$ 10,000	\$ 10,000
Land improvements	16,511	16,511
Buildings and building improvements	2,534,013	2,442,864
Furniture and equipment	443,016	388,996
Vehicles	<u>27,696</u>	<u>27,696</u>
	3,031,236	2,886,067
Less accumulated depreciation	<u>(1,984,671)</u>	<u>(1,865,260)</u>
	<u>\$ 1,046,565</u>	<u>\$ 1,020,807</u>

### 5. NET ASSETS WITH DONOR RESTRICTIONS

Net assets with donor restrictions are available for the following at December 31, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Restricted for specified purpose		
Emergency services	\$ 51,880	\$ 86,871
Preschool	223,399	9,163
Restricted for endowment		
Beneficial interest in assets held by others	<u>268,085</u>	<u>246,890</u>
	<u>\$ 543,364</u>	<u>\$ 342,924</u>

The remaining beneficial interest in assets held by others of \$101,709 and \$90,625 as of December 31, 2023 and 2022, respectively, is included in net assets without donor restrictions – board designated endowment.

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### 6. NET ASSETS RELEASED FROM RESTRICTIONS

Net assets were released from donor restrictions as follows during the years ended December 31, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Purpose restrictions accomplished:		
Emergency services	\$ 86,871	\$ 66,378
Preschool	9,163	66,525
Endowment funds appropriated for expenditure	<u>7,733</u>	<u>7,017</u>
	<u>\$ 103,767</u>	<u>\$ 139,920</u>

### 7. ENDOWMENT

MCUM's endowment consists of one board designated fund and one fund that consists of donor restricted and board designated funds. Both funds have been established to support general operations. As required by accounting principles generally accepted in the United States of America (GAAP), net assets associated with endowment funds, including funds designated by the Board of Directors to function as endowments, are classified and reported based on the existence or absence of donor-imposed restrictions.

The Board of Directors has interpreted the Uniform Prudent Management of Institutional Funds Act (UPMIFA) as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds, absent explicit donor stipulations to the contrary. As a result of the interpretation, MCUM retains in perpetuity (a) the original value of gifts donated to the endowment, (b) the original value of subsequent gifts to the endowment, and (c) accumulation to the endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulations are added to the fund.

Donor-restricted endowment funds are subject to appropriation for expenditure by the organization in a manner consistent with the standard of prudence prescribed by UPMIFA. In accordance with UPMIFA, MCUM considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of MCUM and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation of investments
- (6) Other resources of MCUM
- (7) The investment policies of MCUM



# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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From time to time, due to unfavorable market fluctuations, the fair value of assets associated with the donor-restricted endowment funds may fall below the level that the donor or UPMIFA requires to be retained as a fund of perpetual duration. Both CFBMC and MCUM internally have policies that do not preclude spending from underwater endowment funds, unless otherwise not permitted by donor intent or relevant laws and regulations. There were no deficiencies of this nature at December 31, 2023 and 2022.

MCUM has adopted investment and spending policies for assets held for endowment that attempt to provide a predictable stream of funding to programs supported by its endowment while seeking to maintain the original fair value of the endowment assets. Assets held for endowment include those assets of donor-restricted funds that MCUM must hold in perpetuity, as well as board-designated funds.

Under this policy, MCUM has funds held at CFBMC. The assets held at CFBMC are invested in a manner that is intended to produce a total return which protects the purchasing power of the investment and which allows a spending rate of up to 4.25% of average fund value over the prior 16 quarters. MCUM expects its assets at CFBMC, over time, to provide an average rate of return of approximately 7% annually. Actual returns in any given year may vary from this amount.

MCUM internally manages a portion of its board designated endowment funds. The internally managed funds are invested in a manner that is intended to produce a total return which protects the purchasing power of the endowed investments but which allows an annual spending rate of 2% of the fund value. An annual increase of 3% will be added to the principal balance to allow for future inflation so as to maintain an inflation adjusted principal balance of the fund. No withdrawals will be permitted which would decrease the adjusted principal of the fund without the approval of the Board. MCUM expects the internally managed endowment investments, over time, to provide an average rate of return of approximately 6-8% annually. Actual returns in any given year may vary from this amount.

To satisfy its long-term rate-of-return objectives, MCUM relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). MCUM targets a diversified asset allocation that places a greater emphasis on fixed income investments and cash to achieve its long-term return objectives within prudent risk constraints.

**MONROE COUNTY UNITED MINISTRIES, INC.**

NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023 AND 2022

The composition of endowment net assets is as follows at December 31, 2023 and 2022:

	2023		
	Without Donor Restrictions	With Donor Restrictions	Total
Board designated	\$ 946,303	\$ -0-	\$ 946,303
Donor restricted	<u>-0-</u>	<u>268,085</u>	<u>268,085</u>
	<u>\$ 946,303</u>	<u>\$ 268,085</u>	<u>\$ 1,214,388</u>
	2022		
	Without Donor Restrictions	With Donor Restrictions	Total
Board designated	\$ 833,141	\$ -0-	\$ 833,141
Donor restricted	<u>-0-</u>	<u>246,890</u>	<u>246,890</u>
	<u>\$ 833,141</u>	<u>\$ 246,890</u>	<u>\$ 1,080,031</u>

The change in endowment net assets is as follows for the years ended December 31, 2023 and 2022:

	2023		
	Without Donor Restrictions	With Donor Restrictions	Total
Endowment net assets, beginning of year	\$ 833,141	\$ 246,890	\$ 1,080,031
Investment return, net	117,206	28,928	146,134
Appropriation of endowment assets for expenditure	<u>(4,044)</u>	<u>(7,733)</u>	<u>(11,777)</u>
Endowment net assets, end of year	<u>\$ 946,303</u>	<u>\$ 268,085</u>	<u>\$ 1,214,388</u>
	2022		
	Without Donor Restrictions	With Donor Restrictions	Total
Endowment net assets, beginning of year	\$ 545,953	\$ 283,941	\$ 829,894
Contributions	410,000	-0-	410,000
Investment return, net	(119,141)	(30,034)	(149,175)
Appropriation of endowment assets for expenditure	<u>(3,671)</u>	<u>(7,017)</u>	<u>(10,688)</u>
Endowment net assets, end of year	<u>\$ 833,141</u>	<u>\$ 246,890</u>	<u>\$ 1,080,031</u>

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### 8. FAIR VALUE MEASUREMENTS

The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1) and the lowest priority to unobservable inputs (level 3). The three levels of the fair value hierarchy are described as follows:

- Level 1: Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that MCUM has the ability to access.
- Level 2: Inputs to the valuation methodology include quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in inactive markets; inputs other than quoted prices that are observable for the asset or liability; inputs that are derived principally from or corroborated by observable market data by correlation or other means. If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.
- Level 3: Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at December 31, 2023 or 2022.

Exchange traded funds and mutual funds: Valued at the daily closing price as reported by the fund. Exchange traded funds and mutual funds are open-end funds that are registered with the Securities and Exchange Commission. These funds are required to publish their daily net asset value (NAV) and to transact at that price. The funds held by MCUM are deemed to be actively traded.

Beneficial interest in assets held by others: Valued at fair value as reported by CFBMC, which represents MCUM's pro rata interest in the CFBMC's investment pool, substantially all of which are valued on a mark-to-market basis.

**MONROE COUNTY UNITED MINISTRIES, INC.**

NOTES TO FINANCIAL STATEMENTS  
DECEMBER 31, 2023 AND 2022

The following table sets forth by level, within the hierarchy, MCUM's assets measured at fair value on a recurring basis as of December 31, 2023 and 2022:

	2023		
	Total	Level 1	Level 3
Mutual funds	\$ 757,630	\$ 757,630	\$ -0-
Exchange traded funds	60,793	60,793	-0-
Beneficial interest in assets held by others	369,794	-0-	369,794
	2022		
	Total	Level 1	Level 3
Mutual funds	\$ 708,188	\$ 708,188	\$ -0-
Beneficial interest in assets held by others	337,515	-0-	337,515

The following table sets forth the change in assets measured at fair value on a recurring basis using significant unobservable inputs (level 3):

	2023	2022
Balance, beginning of year	\$ 337,515	\$ 283,941
Contributions	-0-	110,000
Investment return, net	44,056	(45,738)
Distributions	(11,777)	(10,688)
Balance, end of year	<u>\$ 369,794</u>	<u>\$ 337,515</u>

**9. PROFIT SHARING PLAN**

MCUM maintains a 401(k) plan for the benefit of employees meeting certain eligibility requirements. The plan calls for MCUM to match employee contributions based on a formula. Discretionary contributions are determined annually by MCUM. Eligible participants are immediately vested in their own contributions to the plan. Eligible participants vest in employer contributions according to the provisions of the plan. Retirement expense under the 401(k) plan was \$7,008 and \$7,987 for the years ended December 31, 2023 and 2022.

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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### 10. CONCENTRATIONS

MCUM's investments and the beneficial interest in assets held by others are exposed to various risks such as interest rate, market, and credit risk. Due to the level of risk associated with these assets and the level of uncertainty related to changes in their value, it is at least reasonably possible that changes in the various risk factors will occur in the near term that could materially affect the amounts reported in the accompanying financial statements, however, management believes that the investment policy that it has established for investments is prudent for the long-term welfare of MCUM and its beneficiaries.

MCUM maintains its cash in bank deposit accounts which, at times, may exceed federally insured limits. MCUM has not experienced any losses in such accounts. MCUM believes it is not exposed to any significant credit risk on cash.

Marketable securities and money market funds are maintained with two investment firms. Such balances, at times, may exceed the Securities Investor Protection Corporation insured limits of up to \$500,000.

### 11. LIQUIDITY AND AVAILABILITY

The following reflects MCUM's financial assets as of the Statement of Financial Position date, reduced by amounts not available for general use within one year of the Statement of Financial Position date because of contractual or donor-imposed restrictions:

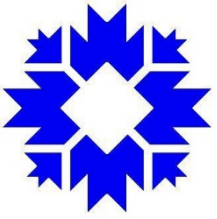
	2023	2022
Cash and cash equivalents	\$ 212,218	\$ 563,324
Certificate of deposit	103,233	-0-
Vouchers and fees receivable	63,261	64,987
Grants receivable	234,909	21,599
Investments	<u>844,594</u>	<u>742,516</u>
Total financial assets	1,458,215	1,392,426
Less: board designated endowment (excludes \$101,709 and \$90,625, respectively, held at CFBMC)	844,594	742,516
Less: donor restrictions for specific purposes	<u>275,279</u>	<u>96,034</u>
Financial assets available for general expenditures within one year	<u>\$ 338,342</u>	<u>\$ 553,876</u>

# MONROE COUNTY UNITED MINISTRIES, INC.

## NOTES TO FINANCIAL STATEMENTS DECEMBER 31, 2023 AND 2022

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MCUM's endowment funds consist of donor restricted and board designated endowments. Both endowments are to support certain future expenditures as more fully described in Note 7. Based on CFBMC's spending policy, balance of the fund and historical distributions, MCUM expects to receive a distribution from this donor-restricted endowment fund of approximately \$10,000 in the next year. The board designated endowment has a spending rate of 2 to 4 percent. Although MCUM does not intend to spend from this board designated endowment (other than amounts appropriated for general expenditures as part of the Board's annual budget approval and appropriation), these amounts could be made available, if necessary.



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** Mother Hubbard's Cupboard

**Address:**

1100 W. Allen Street Bloomington, IN 47403
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**Phone:** 8123395887

**E-Mail:** outreach@mhcfoodpantry.org

**Website:** mhcfoodpantry.org

**President of Board of Directors:** Devon Perry

**Name of Executive Director:** Megan Betz

**Phone:** 8123395887

**E-Mail:** ceo@mhcfoodpantry.org

**Name of Grant Writer:** Liz Barnhart

**Phone:** 8123395887

**E-Mail:** outreach@mhcfoodpantry.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
4	2	120

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Mother Hubbard's Cupboard works to increase access to healthy food in ways that cultivate dignity, agency, and community. We believe that access to healthy food is a basic human right. We actively work to eliminate barriers by addressing both immediate needs and their root causes.



## PROJECT INFORMATION

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Name of the project to be funded:

Education and Youth Programming Support

Total cost of project: 14250

Requested amount of Jack Hopkins funding: 14250

Number of City residents to be served by this project in 2024: 25000

Number of clients to be served by this project in 2024: 25000

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

MHC is requesting \$14,250 for Education and Youth programming support. In 2023, MHC hosted 147 youth workshops, including gardening and cooking, with 812 participants. We hosted 47 cooking education workshops, and 70 garden workdates and workshops. Funding from Jack Hopkins would allow us to cover the costs of these programs that are offered not only to our patrons, but to all community members. We are also requesting materials to make our physical space accessible and sustainable, including garden beds, deck texturizer, and gravel for our parking lot.

Funding in the requested amount will cover the following expenses (July - December):

- Gravel for parking lot
- Educational stipends
- Educational workshop supplies
- Compost
- Seed starting supplies (trays, domes, paper for tags, plastic wrap)
- Vego raised beds
- Microgreens supplies (lights, containers for kits, seed)
- Tool Share
- Stain and texturizer for new deck

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

N/A

How do your missions, operations and services complement each other?

N/A

What is the existing relationship between agencies?

N/A

How will communication and coordination change as a result of the project?

N/A

Explain any challenges and steps you plan to take to address those challenges.

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

1100 W. Allen Street (same as agency address)

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes

No

**If “yes,” indicate the nature of the operational request:**

Pilot

Bridge

Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

MHC relies on individual donations and special events to fund not only operational expenses, but also insurance, salaries, programming costs, and other organizational needs.  
Annual Breakfast fundraiser: \$40,000 + various multi-year pledges — pending  
Garden Gala fundraiser: \$10,000 – pending  
Recurring donations July - December: \$140,000 – pending

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

MHC will submit monthly claims for these expenses beginning in July and concluding in December.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Our education programming is ongoing, so we rely on donations, which are all year. We also will use funding from our April Breakfast, and our August Gala.

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

MHC uses a combination of in-kind donations, volunteer support, and collaborative partnerships to maximize organizational efficiency. Funding sources are diverse, ranging from national, regional, and local grants, to corporate and individual donors.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Educational workshop supplies and stipends	2600
Priority #2	Garden education supplies (compst, seed starting supplies, vego raised beds, microgreen supplies)	3050
Priority #3	Tool Share equipment and maintenance	1500
Priority #4	Kids Snacks	5000
Priority #5	Gravel for lot and deck stain/texturizer	600
Priority #6	Summer interns via ILP program	1500
Priority #7		
<b>Total Requested</b>		14250

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Food access continues to be a concern in our community, as identified in the 2020-2024 Consolidated Plan. According to Feeding America, 21,080 of Monroe County residents were food insecure in 2019. Monroe County's rate of food insecurity (16%) is considerably higher than that of the national rate of 12.8%. MHC's educational programming provides the skills and resources that people need to cook and grow food at home, reducing the costs of food and building skills that improve health. MHC's Youth programming addresses meal gaps for children, as well as provides a safe place for children to learn new skills that will build healthier habits for their future. According to the 2012 SCAN, nearly half (47%) of low-income households in Monroe County reported problems having enough money for food.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Parts of our request, including the gravel, raised beds, tool share equipment, deck stain, and compost, are investments that will benefit our organization and physical space for years to come.

The gardening supplies, educational materials, stipends, and Kid's Snacks are one-time asks that will be funded by additional grants, donations, and fundraisers in the future.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

MHC’s educational and youth programming are an investment in our community members and patrons. The skills that are taught in our space improve the quality of life of our patrons. Learning to cook on a budget, kitchen skills, and how to grow your own food empowers are patrons to make healthier choices. Our Tool Share program allows patrons to divert money that they would be spending on kitchen and gardening equipment to other crucial aspects such as food, health care, transportation, and living costs. The stipends for our education programming and ILP interns also allows staff to dedicate more time to improving our services to our patrons and build long-lasting relationships with our community members.

As the pantry offers a buffer against the physical effects of food insecurity, the Education Programs work to do the same for the psychological effects (i.e. stress and isolation). While our community offers many opportunities for social engagement and enrichment, all too often those opportunities are inaccessible to our low-income neighbors, whether due to cost or commitment. Our Education Programs offer low-barrier, accessible opportunities for engagement and enrichment at no cost to

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Outcome indicators for our request include the following:

- Number of workshops (cooking, youth, and gardening) offered
- Number of workshop (cooking, youth, and gardening) attendees
- Number of pantry tabling interactions
- Number of Tool Share check-outs
- Number of pounds of Kid Snacks distributed

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

We recognize the priority to fund one-time investments, and that our programming is an ongoing project. The funding we are requesting is to try out a new structure of having the bulk of our workshops be led by experts within the community, which allows patrons to connect with each other, empower each other, and feel ownership over this community space.



<b>what we hoped for</b>	<b>15000</b>	Priority
<b>total for items below</b>	<b>14250</b>	
gravel for parking lot	300	
educational stipends	600	
educational workshop supplies	2000	
compost	500	
Seed starting supplies (trays, domes, paper for tags, plastic w	500	
Vego raised beds	900	
Microgreens supplies (lights, containers for kits, seed)	750	
Tool Share	1500	
stain and texturizer for new deck	300	
summer interns via ILP program	1500	
LED grow lights	400	
Kids Snacks?	5000	

2 at least \$100/month for 4 months (Sept-Dec)

1 \$500/month for 4 months (Sept-Dec)

3 to share w patrons

5

6

4

7

labor we've historically used for these programs, which we're paying for for this first time this year--will not be recurring request

replace ours; move the flourescent ones into tool share

# MOTHER HUBBARD'S CUPBOARD INC.

## Balance Sheet

As of December 31, 2023

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Charles Schwab Investment Acct	7.58
Checking	108,156.55
IUCU Savings Direct Giving	465.53
Other Bank Cash	0.00
Petty Cash	9.68
Petty Cash Garden Gala	0.00
Savings 1008023356	15,171.87
<b>Total Bank Accounts</b>	<b>\$123,811.21</b>
Accounts Receivable	
Other Receivable	0.00
PayPal	0.00
Pledges Receivable	0.00
2005 Pledges Receivable	0.00
2006 pledges receivable	0.00
2007 pledges receivable	0.00
2008 pledges receivable	0.00
2009 pledges receivable	0.00
2010 pledges receivable	0.00
2011 pledges receivable	0.00
2012 Cap Camp AR	0.00
2012 Pledges Receivable	0.00
2013 Cap Camp AR	0.00
2013 Pledges Receivable	0.00
2014 Cap Camp AR	0.00
2014 Pledges Receivable	0.00
2015 Cap Camp AR	0.00
2015 Pledges Receivable	0.00
2016 Pledges Receivable	0.00
2017 Pledges Receivable	-1,070.00
2018 Pledges Receivable	-1,270.00
2019 Pledges Receivable	25,008.71
2020 Pledges Receivable	23,630.26
2021 Pledges Receivable	19,749.26
2022 Pledges Receivable	16,270.52
2023 Pledge Receivable	7,296.62
<b>Total Pledges Receivable</b>	<b>89,615.37</b>
UPG - United Way	0.00
<b>Total Accounts Receivable</b>	<b>\$89,615.37</b>

# MOTHER HUBBARD'S CUPBOARD INC.

## Balance Sheet

As of December 31, 2023

	TOTAL
Other Current Assets	
Allow Doubtful Accts - Pledges	-14,000.00
Discount on Pledges	-1,000.00
<b>Total Allow Doubtful Accts - Pledges</b>	<b>-15,000.00</b>
Inventory Asset	0.00
Pass Thru for Venison Account	0.00
Prepaid Expenses	4,191.84
Prepaid Gen Liab. & Health Ins.	0.00
Prepaid Ins - D&O	0.00
Prepaid Ins - Wkrs Comp	0.00
Prepaid Ins -Auto	0.00
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$ -10,808.16</b>
<b>Total Current Assets</b>	<b>\$202,618.42</b>
Fixed Assets	
Accumulated Depreciation	-299,632.53
Apple Computers	23,059.93
Awning	4,230.00
Building	348,581.80
Building Improvement	161,108.40
Dumpster Enclosure	3,500.00
Equipment	38,943.76
Equipment-VAN	41,324.50
Furniture	18,918.54
Garden Shed	3,280.00
Landscaping	1,175.00
Leasehold Improvements	79,677.97
Phone System	3,828.00
Stainless Steel Sink	1,550.00
Stoves (2)	1,300.14
Walk-In Cooler/Freezer Combo	26,905.00
<b>Total Fixed Assets</b>	<b>\$457,750.51</b>
Other Assets	
Rent Security Deposit	0.00
<b>Total Other Assets</b>	<b>\$0.00</b>
<b>TOTAL ASSETS</b>	<b>\$660,368.93</b>

# MOTHER HUBBARD'S CUPBOARD INC.

## Balance Sheet

As of December 31, 2023

	TOTAL
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable	0.00
<b>Total Accounts Payable</b>	<b>\$0.00</b>
Credit Cards	
Mr. Copy on account	0.00
<b>Total Credit Cards</b>	<b>\$0.00</b>
Other Current Liabilities	
Accrued Payroll	0.00
Accrued Real Estate Taxes	0.00
Deposit for Repairs	0.00
Line of Credit ONB	0.00
Other Current Liabilities	0.00
Payroll Liabilities	15,018.00
Simple IRA	100.33
<b>Total Payroll Liabilities</b>	<b>15,118.33</b>
Unearned Revenue	0.00
<b>Total Other Current Liabilities</b>	<b>\$15,118.33</b>
<b>Total Current Liabilities</b>	<b>\$15,118.33</b>
Long-Term Liabilities	
ONB Mortgage Payable	0.00
<b>Total Long-Term Liabilities</b>	<b>\$0.00</b>
<b>Total Liabilities</b>	<b>\$15,118.33</b>
Equity	
Opening Bal Equity	0.00
Retained Earnings	721,299.74
Net Income	-76,049.14
<b>Total Equity</b>	<b>\$645,250.60</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$660,368.93</b>

# MOTHER HUBBARD'S CUPBOARD INC.

## Profit and Loss

January - December 2023

	TOTAL
Income	
Contributions Income	
Church/Nonprofit	4,873.84
Corporate	15,269.57
Individual	209,987.83
NAP Individual Contributions	22,332.00
Stock Donations	5,148.94
United Way	
Allocation	27,446.00
<b>Total United Way</b>	<b>27,446.00</b>
<b>Total Contributions Income</b>	<b>285,058.18</b>
Grants	10,000.00
Bloomington Township Grant	1,000.00
CDBG	11,118.93
Emergency Food Asst. Program	4,164.00
Jack Hopkins	33,914.00
Other Garden Grants	3,100.00
Other Program Grants	157,633.19
Perry Township Grant	10,000.00
Psi Iota Xi	500.00
SCI Comm Fund Grant	3,000.00
Sophie Travis Grant	5,250.00
<b>Total Grants</b>	<b>239,680.12</b>
Interest Income	14.75
Merchandise Sales	6,540.40
Misc. Income, Tools & T-Shirts	1,842.67
Special Events	
Block Party	2,044.00
Breakfast	52,667.00
Chilly Cook-Off	100.75
GG Garden Gala	10,469.10
Giving Tuesday	1,500.00
<b>Total Special Events</b>	<b>66,780.85</b>
<b>Total Income</b>	<b>\$599,916.97</b>
Cost of Goods Sold	
Cost of Goods Sold	0.00
<b>Total Cost of Goods Sold</b>	<b>\$0.00</b>
<b>GROSS PROFIT</b>	<b>\$599,916.97</b>

# MOTHER HUBBARD'S CUPBOARD INC.

## Profit and Loss

January - December 2023

	TOTAL
Expenses	
Advertising	
MHC Merchandise	1,006.40
<b>Total Advertising</b>	<b>1,006.40</b>
Automobile Expense	
Other	560.35
<b>Total Automobile Expense</b>	<b>560.35</b>
Building R&M	52,825.18
Building R&M, Unexpected	520.83
Conference/Travel	59.10
Conferences/Trainings	1,923.10
Depreciation	24,097.68
Development	152.01
Direct Giving Application Review	240.00
Direct Giving Patrons	9,020.00
Dues & Fees	1,588.88
Equipment R&M	94.00
FDE Fundraising Direct Expense	1,223.45
Block Party	1,243.57
Breakfast	1,151.06
Chilly Cook-Off	604.75
Direct Mail	8,268.07
Donors	223.92
Garden Gala	4,096.11
Postage/Mailing	198.00
Printing/Reproduction	1,386.75
<b>Total FDE Fundraising Direct Expense</b>	<b>18,395.68</b>
Food Purchases-Other	67,428.25
HHFB SMC	16,595.55
Insurance	384.74
Auto-Insurance Vans	843.77
D&O Insurance	758.00
Liability Insurance	1,806.19
Worker's Comp	4,800.84
<b>Total Insurance</b>	<b>8,593.54</b>
Misc. Expenses	0.00
Payroll Expenses	
ADP Fees	1,563.37
Health STD LTD Den & Vis Ins.	42,535.41
Salary and Wages	320,013.69
Simple IRA MHC Contribution	5,874.69
SPEA Intern	43.68

# MOTHER HUBBARD'S CUPBOARD INC.

## Profit and Loss

January - December 2023

	TOTAL
Taxes	25,000.71
<b>Total Payroll Expenses</b>	<b>395,031.55</b>
Postage and Delivery	2,074.63
Printing and Reproduction	66.25
Professional fees	21,371.95
Audit	5,750.00
Nutritionists, speakers	1,300.00
<b>Total Professional fees</b>	<b>28,421.95</b>
R&M Unexpected	3,897.14
Supplies	
Advocacy & Outreach	463.68
Education	3,281.73
Garden	4,024.06
Program Equipment	189.89
<b>Total Garden</b>	<b>4,213.95</b>
Nutrition	1,003.33
Office	1,463.17
Operations	284.65
Pantry	5,813.53
Printing	57.58
Staff Appreciation	909.87
Technology/Software	7,179.74
Tool Share	1,180.65
Volunteer Appreciation	118.25
Youth Garden	785.05
<b>Total Supplies</b>	<b>26,755.18</b>
Utilities	
Electric	7,413.18
Gas	1,472.66
Telephone/Internet	3,471.01
Trash	2,895.34
Water	1,366.67
<b>Total Utilities</b>	<b>16,618.86</b>
<b>Total Expenses</b>	<b>\$675,966.11</b>
NET OPERATING INCOME	<b>\$ -76,049.14</b>
NET INCOME	<b>\$ -76,049.14</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** My Sister's Closet of Monroe County, Inc.

**Address:**

414 S. College Ave. Bloomington, IN 47403
--

**Phone:** 812-333-7710

**E-Mail:** info@sisterscloset.org

**Website:** Https://sisterscloset.org/

**President of Board of Directors:** Maryanne Pelic

**Name of Executive Director:** Sandy Keller

**Phone:** 812-369-6582

**E-Mail:** director@sisterscloset.org

**Name of Grant Writer:** Sandy Keller



**Phone:** 812-369-6582  
**E-Mail:** Director@Sisterscloset.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
5	7	450

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

My Sister's Closet is a non-profit organization, established to build a stronger community and promote economic self-sufficiency by providing women with professional support services and tools for success.

## PROJECT INFORMATION

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Name of the project to be funded:

Geppetta's - Cobbler Skills Training For Shoe Repair

Total cost of project: \$30,304

Requested amount of Jack Hopkins funding: 25,000

Number of City residents to be served by this project in 2024: 800

Number of clients to be served by this project in 2024: 80

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

My Sister's Closet (MSC) is requesting \$25,000 for supplies and staff training, as part of our pilot project to provide basic technical skills and entrepreneurial business management training to clients who have expressed the desire to become skilled craftswomen. This training and education would prepare them with transferable skillsets to work with a cobbler or apply them in related service-based businesses to make a living wage.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

414 S College Ave.  
Bloomington, IN 47403

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Current space has been rented since January 2015. Our lease extends to December 2025. Future lease extensions are dependent future expansions to the Convention Center should they decide to expand south for phases II or III. (Info based on 2018-2019 stakeholder meetings). The community shoe repair and cleaning services we hope to provide to the public, and to Success Institute clients, are not dependent on our current address and can be relocated.

**Is the property zoned for your intended use?**       Yes       No       N/A  
If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

Currently consulting Monroe Count building department for guidance on permits required for this project, as well as Commercial Service Heating and Air for necessary air purification, venting, and ductwork needs.  
Current space was formerly rented by Sole Sensations, a business that crafted and fixed shoes for patient podiatry services. Some of the ductwork that was in place for that business still exists but might need to be updated. This grant request addresses the purchase of necessary air equipment and systems needed to keep the workspace for our pilot project safe.

# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Once these tools are purchased and the necessary skill sets are mastered by Project supervisors, along with training to volunteers, MSC will sell these cobbler services to established community supporters and boutique customers creating a new residual income stream for MSC.

In the first full year, once we are past the necessary pilot start-up training period for staff members and volunteers, we plan to start upcycling, repairing, and cleaning a minimum of 200 units each year. If the average sale of these upcycled items is \$25/unit, we will realize an additional = \$5,000, in service income, which we will try to build in sales each consecutive year.

MSC currently utilizes a self-funded, non-profit business model using residual income, to fund our mission. Incorporating the sale of cobbler services will provide additional reliable funding for Success Institute client programming.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Invoices for equipment and supplies will be submitted as they are purchased. The staff project lead's salaries needed to learn the shoe/purse repair skills sets, will be submitted monthly.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

MSC expects to gradually increase the sale of refurbished and repaired shoes and purses through this project. Once we gain some proficiency and experience, we can work on time studies to increase production, allowing us to fix and clean more items. Based on our projections, sales realized by replacing heels, and the cleaning leather bags and shoes, will generate enough income to fund the project lead's additional hours by the end of the 2024.

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

- 1) Community members already provide MSC with hundreds of donated shoe and purse stock annually that often come to us dirty, or in need of refurbishment. We normally pass these items along to be recycled. This project will provide us with the tools and training needed to clean and repair these items ourselves, providing us with client training stock, and new items for sale to the public.
- 2) MSC has an incredible established team of community volunteers who gather weekly to process shoe and purse stock. These volunteers have already agreed to work directly on this project as client advocates and mentors as they go through this programming.
- 3) We plan to increase the hours of our E-Commerce manager, who is already established project manager, to serve as the first lead on this project.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	6 Month Salary - Project Lead 1, (20 Hours/week x \$17.20 x 26 weeks)	<b>\$8,944</b>
Priority #2	Leather Cleaning, Restoration, Basic Exterior Repair, and Polishing Supplies	<b>\$1,420</b>
Priority #3	6 Month Salary - Project Lead #2, (20 Hours/week x \$17.20 x 26 weeks)	<b>\$8,944</b>
Priority #4	Estimate for Commercial Service, BLAST MKII AIR PURIFIER H13 HEPA + SEPARATE CARBON FILTER, + ductwork inspection and air filtration system (attached)	<b>\$5,500</b>
Priority #5	Paid client workforce experiences x 4 clients x 100 hours each /\$13.74/hour	<b>\$5,496</b>
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$30,304</b>



# **JACK HOPKINS FUNDING CRITERIA**

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

We currently live in an economy where low-income families are struggling to tighten their belts. For single, low-income women, it is especially difficult to pay bills while raising children. Creating a new career path that speaks to their needs is especially important. If these women have additional obstacles, such as the lack of skills or education, have past felonies, or lack childcare or transportation; finding sustainable employment is almost impossible. It is therefore essential to create jobs that speak to their circumstances by providing them with new sustainable, career opportunities.

Training these women with cobbler and business management skills sets would result in a positive benefit for the whole community, but especially to other low-income households, by giving other low-income households a resource to help extend the life of their shoes and bags; allowing them to stretch their current resources, helping them to pay for essentials such as rent, utilities, food, and car payments ... etc., ultimately benefiting the whole community.

As cited on page 80 of the 2020-2024 Consolidated Plan, under workforce training initiatives, "Job creation and retention were cited as the highest priority economic development need by stakeholders in order give residents better access to affordable housing."

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, voucher so etc.), you must detail your plan for future funding.

By combining MSC's already established staff, volunteers, supporter donations, and customer support from the annual sale of hundreds of shoes and purses each year at our re-sale boutique, we believe we can reliably forecast that the funds received from the 2024 Jack Hopkins Social Services grant needed to begin this pilot project would be a one-time investment.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

- 1) Provide a real solution to budget-minded, low-income families who need solutions for maintaining and extending the life of their leather shoes and purses.
- 2) Provide a valued service to an established customer base of community residents who used to rely on local cobbler services.
- 3) Provide an ecologically sustainable solution so community members can repair their shoes, bags, belts, and wallets that they would otherwise toss into the landfills, resulting in a marked reduction in our collective carbon footprint.
- 4) Allow MSC clients to enter a field using transferable skillsets that allow them to make a living where they can be seen as appreciated artisans. This addresses those who are passionate about making a living while combining the use of their hands, technical knowledge, interpersonal skills, customer service finesse, and business management skills and training.
- 5) Individually, the larger goal of this project will be to provide a permanent solution to move these future artisans, business owners, and managers, out of long-term poverty.
- 6) Provide additional, long-term residual funding to My Sister's Closet's core mission services.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Outcome indicators we will use to measure the success of this project will include:

- 1) 4 Clients - successfully been trained with beginning cobbler skills and business management training.
- 2) Train 4 low-income clients with new transferable, technical, and business management skill sets, to be seen as more employable, so they can move out of poverty.
- 3) Show \$2,000 in sales in the last quarter of 2024, to show that MSC has successfully sold refurbished shoes and purses, providing new income to our annual mission budget.
- 4) Successfully upcycle, clean, or refurbish 50 donations we would have normally recycled.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

The list of supplies is based on having the correct tools available when needed after assessing the extent of the shoe or purse damage. Geppetta's Cobbler Skills Training will establish a system for understanding the nature of the scuffs and scratches, to determine the most appropriate repair method. The process begins with careful examination with the use of LED shop lights to look for shallow surface scuffs, deeper scratches, or discoloration. Additionally, different types of leather may react differently to repair techniques, so it's essential to take note of the specific characteristics of each pair of shoes.

MSC's services will include - Reconditioning and repair services will include: Cleaning the shoes; Treating scuff marks and deep scratches; Polishing and conditioning; Buffing and finishing touches with leather protectant and water-repellents; and replacing women's high heels. For now, they will not include restitching, leather replacement, and most heel replacement.

Every year in the United States, people discard over 300 million pairs of shoes, not including other leather items such as purses, belts, or wallets. 95% of these shoes end up in landfills. The environmental impact of this massive shoe waste is significant, as shoes can take 30 to 40 years to decompose in landfills. It's crucial to consider sustainable practices and explore ways to reduce this waste, such as recycling or donating shoes to extend their lifespan.

Reducing our carbon footprint could not be more critical to the planet. As stewards of the environment, it is our responsibility to invest in service industries that will encourage us as consumers to reuse and extend the life of the shoes and leather products we already own.

This project is in line with My Sister's Closet sustainability mission, known as the Green Side of Pink, and also aligns with the core of our mission, Compassion Through Fashion.

	A	B	C	D	E
1	Material List for Shoe Reconditioning, Cleaning, Basic Exterior Repair, and Polishing	Cost/Unit	Size:	# Units	Total Cost
2					
3	Leather Kiwi Horse hair Brushes	\$6.90	large	5	\$34.50
4	Horse Hair brushes - small crevice	\$7.99	small	3	\$23.97
5	Leather Cleaning Clothes	\$10.99	10 pieces	5	\$54.95
6	Chemical Guys PH balanced Cleaner	\$22.00	16 oz.	3	\$66.00
7	Weiman Leather Wipes (30 cloths)	\$4.25	30	5	\$21.25
8	Suede Brushes	\$4.95	small	5	\$24.75
9	Furniture Clinic - Leather Repair Cream Filler Compound	\$9.95	1.7 oz	5	\$49.75
10	irka Leather Sand Paper - 8.5" x 11"	\$1.14	8.5" x 11"	10	\$11.14
11	Leather glue	\$9.00	2.1 oz	1	\$9.00
12	Furniture Clinic - Leather Degreaser	\$29.95	8.5 oz.	4	\$119.80
13	Huberd's Shoe Grease - Leather Conditioner/Water Proofer	\$17.99	7.5 oz	4	\$71.96
14	Chemical Guys - Leather Conditioner	\$22.00	16. oz.	2	\$44.00
15	Masking tape and Painter's tape	\$4.00	3/4" x 60 yds	5	\$20
16	Microfiber Buffing Cloths	\$10.99	10 pieces	5	
17	Horse Hair Polish Dauber Applicators	\$7.99	10	10	\$79.90
18	KIWI - Water Proofing Sprays for Suede	\$9.49	4.25 oz	4	\$37.96
19	Tractor Supply - Max Shield, Water Proofing Spray - Leather	\$8.99	10.5 oz	10	\$89.90
20	SAS Shoe Creams/Polishes - 20 Colors, some duplicates	\$5.00	1.5 oz	20	\$100
21	Reference Book: How to Repair Shoes: Frank L West	\$16.99	1	1	\$16.99
22	Gloves - Noble NexGen 3 Mil Blue Biodegradable Powder-Free Nitrile Gloves	\$2.79	sm, med, lg	200/box	\$8.37
23	Goop - Multipurpose Hand Cleaner, 14 oz	\$9.40	14 oz	3	\$28.20
24	Go Be Gone - Adhesive Remover	\$19.98	12. oz	1	\$19.98
25	36 Pairs High Heel Caps and Repair Tips with Stiletto Remove Pliers, 6 Sizes Non-Skidding High Heel Replacement Caps for Women High Heels	\$15.99		5	\$79.95
26	Neoprene Work Aprons -- Protection against chemicals and oils. - Uline	\$21		6	\$126.00
27	Half face respirators - Uline	\$47	sm, med, lg	6	\$282.00
28				1	
29					
30	<p>*Smart blast MK II Purifier H13 Hepa + carbon filters is The Smart Air Blast - MKII is the most cost effective, high capacity, commercial grade HEPA air purifier on the market.</p> <p>It can clean spaces up to 4,500 sq ft in 30 minutes at a remarkably low noise level (only 43 dBA). That makes the Blast perfect for buildings with large spaces like schools, hospitals, gyms, and offices.</p> <p>The Blast contains a true HEPA with H13 filter material that filters 99.97% of .3-micron particles and 0.07-micron size particles from the air.</p> <p>The optional activated carbon filter is effective at capturing harmful gases like smoke, volatile organic compounds (VOC's) which include formaldehyde, benzene, etc., and harmful gases and odors caused by paints and cleaning supplies.</p>				
31					
32	** Supplies listed line 3 - 25 are recommended to use for cleaning, refurbishing, and polishing leather and leather composite items such as shoes and purses. Some items are similar, but are used under different circumstances based on item requirements and wear. Learning under which circumstances one product is used versus another will be part of this project's objective.				
33					
34	<b>Total Supply List</b>				<b>\$1,420.32</b>

March 29, 2024

My Sisters Closet  
414 S College Ave  
Bloomington IN 47403

Re: HVAC Renovation

Sandra,

Commercial Service of Bloomington is pleased to provide the following Budget Estimate:

- Provide inspection and servicing of existing HVAC equipment report findings
  - Note: Any repairs or corrective work required are not included in this proposal and will be quoted separately
- Purchase and install Qty 1 – Smart Air Blast – MKII including
  - HEPA with H13 filter material
  - Activated carbon filter
  - 120volt
- Provide and install Aluminum fume hood
- Provide and install Qty 1 – Roof mounted exhaust fan with ducting to fume hood
- System Check and Factory Startup

Total Installed Price:

\$5,500.00 Tax Exempt



\_\_\_\_\_  
Proposed –CSB Representative

3/29/2024

date

\_\_\_\_\_  
Accepted –Customer/Customer Representative

\_\_\_\_\_  
date

**GENERAL EXCLUSIONS: ANYTHING NOT LINE ITEMED ABOVE HAS BEEN EXLUDED FROM PROPOSAL**

- Structural Support and Framing
- Roof Patching and Flashing
- Performance and Bid Bond
- Any High Voltage Connections including disconnects
- Night and weekend work
- Class I Div II – Sparkproof motors

**2022 Exempt Org. Return**  
prepared for:

**My Sisters Closet of Monroe County**  
**My Sisters Closet**  
4533 Heritage Woods  
Bloomington, IN 47401

**Stampfli Associates, CPAs, PC**  
1115 N Walnut St., Ste. C  
Bloomington, IN 47404

# Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

# 2022

Department of the Treasury  
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**Open to Public Inspection**

**A For the 2022 calendar year, or tax year beginning** , **2022**, and ending , **20**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> My Sisters Closet of Monroe County My Sisters Closet 4533 Heritage Woods Bloomington, IN 47401	<b>D</b> Employer identification number 35-2050048	<b>E</b> Telephone number (812) 332-9295
<b>F</b> Name and address of principal officer: Same As C Above		<b>G</b> Gross receipts \$ 346,837.	
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions.	
<b>J</b> Website: <u>sisterscloset.org</u>		<b>H(c)</b> Group exemption number	
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other		<b>L</b> Year of formation: 1998	<b>M</b> State of legal domicile: IN

**Part I Summary**

	<b>1</b> Briefly describe the organization's mission or most significant activities: <u>Established to build a stronger community and promote economic self-sufficiency. My Sister's Closet provides women in poverty with professional support services and career development tools for success.</u>		
<b>Activities &amp; Governance</b>	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) .....	<b>3</b>	9
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) .....	<b>4</b>	8
	<b>5</b> Total number of individuals employed in calendar year 2022 (Part V, line 2a) .....	<b>5</b>	19
	<b>6</b> Total number of volunteers (estimate if necessary) .....	<b>6</b>	350
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 .....	<b>7a</b>	0.
	<b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11 .....	<b>7b</b>	0.
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h) .....	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g) .....	96,298.	154,160.
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) .....	22.	
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) .....	193,835.	192,677.
	<b>12</b> Total revenue – add lines 8 through 11 (must equal Part VIII, column (A), line 12) .....	290,155.	346,837.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) .....		
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) .....		
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) .....	116,600.	169,908.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) .....		
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) .....	31,769.	
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) .....	80,811.	140,128.
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) .....	197,411.	310,036.	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12 .....	92,744.	36,801.	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16) .....	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b> Total liabilities (Part X, line 26) .....	163,588.	201,854.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20 .....	3,758.	5,223.
		159,830.	196,631.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer	Date			
	<u>Sandy Keller</u> Type or print name and title	<u>Executive Dir.</u>			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	<u>Dana Bement</u>	<u>Dana Bement, CPA</u>	<u>11/15/23</u>	<input type="checkbox"/>	<u>P00932103</u>
	Firm's name	Firm's address		Firm's EIN	
	<u>Stampfli Associates, CPAs, PC</u>	<u>1115 N Walnut St., Ste. C</u> <u>Bloomington, IN 47404</u>		<u>35-1908065</u>	Phone no. <u>(812) 339-0450</u>

May the IRS discuss this return with the preparer shown above? See instructions  Yes  No



Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:

Established to build a stronger community and promote economic self-sufficiency. My Sister's Closet provides women in poverty with professional support services and career development tools for success.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

Yes No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

Yes No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ 247,401. including grants of \$ ) (Revenue \$ )

To provide professional interview and work attire, hygiene products, life and job skills training, mentoring, and advocacy services.

4b (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses 247,401.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> .....	X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions .....	X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i> .....		X
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i> .....		X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i> .....		X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> .....		X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II.</i> .....		X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> .....		X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> .....		X
<b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi endowments? <i>If "Yes," complete Schedule D, Part V.</i> .....		X
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i> .....	X	
<b>b</b> Did the organization report an amount for investments – other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i> .....		X
<b>c</b> Did the organization report an amount for investments – program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i> .....		X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i> .....		X
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i> .....	X	
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i> .....		X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII.</i> .....		X
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional.</i> .....		X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i> .....		X
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States? .....		X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV.</i> .....		X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV.</i> .....		X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV.</i> .....		X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I.</i> See instructions. ....		X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i> .....		X
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i> .....		X
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H.</i> .....		X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? .....		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i> .....		X

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i> .....		X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i> .....		X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If a "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a.</i> .....		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....		
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i> .....		X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i> .....		X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II.</i> .....		X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i> .....		X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV.</i> .....		X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV.</i> .....		X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV.</i> .....		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i> .....		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i> .....		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i> .....		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i> .....		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i> .....		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i> .....		X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....		X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i> .....		
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i> .....		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i> .....		X
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O. ....	X	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response or note to any line in this Part V

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable. ....		
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable. ....		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	X	

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. . . . .		
	<b>2a</b> 19		
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? . . . . .	X	
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year? . . . . .		X
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O. . . . .		
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . . . . .		X
<b>b</b>	If "Yes," enter the name of the foreign country _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . . . .		X
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? . . . . .		X
<b>c</b>	If "Yes," to line 5a or 5b, did the organization file Form 8886-T? . . . . .		
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . . . .		X
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? . . . . .		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? . . . . .		X
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided? . . . . .		
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? . . . . .		X
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year. . . . .		
	<b>7d</b>		
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .		X
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .		X
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? . . . . .		
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? . . . . .		
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? . . . . .		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the sponsoring organization make any taxable distributions under section 4966? . . . . .		
<b>b</b>	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . . . .		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12. . . . .		
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. . . . .		
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders. . . . .		
<b>b</b>	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) . . . . .		
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? . . . . .		
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year. . . . .		
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state? . . . . .		
	<b>Note:</b> See the instructions for additional information the organization must report on Schedule O.		
<b>b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. . . . .		
<b>c</b>	Enter the amount of reserves on hand . . . . .		
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year? . . . . .		X
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O. . . . .		
<b>15</b>	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? . . . . . If "Yes," see the instructions and file Form 4720, Schedule N.		X
<b>16</b>	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? . . . . . If "Yes," complete Form 4720, Schedule O.		X
<b>17</b>	<b>Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? . . . . . If "Yes," complete Form 6069.		

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI.

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year. . . . . <b>1a</b> 9 If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
<b>b</b>	Enter the number of voting members included on line 1a, above, who are independent. . . . . <b>1b</b> 8		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .		X
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . . . .		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .		X
<b>6</b>	Did the organization have members or stockholders? . . . . .		X
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . . . .		X
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b>	The governing body? . . . . .	X	
<b>b</b>	Each committee with authority to act on behalf of the governing body? . . . . .	X	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O. . . . .		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
<b>10a</b>	Did the organization have local chapters, branches, or affiliates? . . . . .		X
<b>b</b>	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? . . . . .		
<b>11a</b>	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .	X	
<b>b</b>	Describe on Schedule O the process, if any, used by the organization to review this Form 990. See Schedule O		
<b>12a</b>	Did the organization have a written conflict of interest policy? If "No," go to line 13. . . . .		X
<b>b</b>	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .		
<b>c</b>	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done. . . . .		
<b>13</b>	Did the organization have a written whistleblower policy? . . . . .		X
<b>14</b>	Did the organization have a written document retention and destruction policy? . . . . .		X
<b>15</b>	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b>	The organization's CEO, Executive Director, or top management official. See Schedule O. . . . .	X	
<b>b</b>	Other officers or key employees of the organization. . . . .	X	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b>	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		X
<b>b</b>	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed IN
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. See Schedule O
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records.  
 Maryanne Pelic 4533 Heritage Woods Bloomington IN 47401 (812) 332-9295

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII.

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Sandy Keller ----- Executive Dir.	40 ----- 0	X		X			42,342.	0.	0.	
(2) Maryanne Pelic ----- President	10 ----- 0	X		X			0.	0.	0.	
(3) Diane Daily ----- Secretary	2 ----- 0	X		X			0.	0.	0.	
(4) Judi Butler ----- Board Member	2 ----- 0	X					0.	0.	0.	
(5) Cynthia Hogan ----- Board Member	2 ----- 0	X					0.	0.	0.	
(6) Hon. Mary Ellen Diekhoff ----- Board Member	2 ----- 0	X					0.	0.	0.	
(7) Julie Tobin ----- Board Member	2 ----- 0	X					0.	0.	0.	
(8) Molly Otto ----- Board Member	2 ----- 0	X					0.	0.	0.	
(9) Jane Matranga ----- Board Member	2 ----- 0	X					0.	0.	0.	
(10) -----										
(11) -----										
(12) -----										
(13) -----										
(14) -----										

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee			
(15) -----									
(16) -----									
(17) -----									
(18) -----									
(19) -----									
(20) -----									
(21) -----									
(22) -----									
(23) -----									
(24) -----									
(25) -----									

<b>1b Subtotal</b> .....	42,342.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b> .....	0.	0.	0.
<b>d Total (add lines 1b and 1c)</b> .....	42,342.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization 0

	Yes	No
3 Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual.</i> .....	3	X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual.</i> .....	4	X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person.</i> .....	5	X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 0

**Part VIII Statement of Revenue**

Check if Schedule O contains a response or note to any line in this Part VIII

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants, and Other Similar Amounts</b>	<b>1a</b> Federated campaigns .....	<b>1a</b>				
	<b>b</b> Membership dues .....	<b>1b</b>				
	<b>c</b> Fundraising events .....	<b>1c</b>				
	<b>d</b> Related organizations .....	<b>1d</b>				
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	80,367.			
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	73,793.			
	<b>g</b> Noncash contributions included in lines 1a-1f .....	<b>1g</b>				
	<b>h Total.</b> Add lines 1a-1f .....		154,160.			
	<b>Program Service Revenue</b>	<b>2a</b> Business Code				
<b>b</b> -----						
<b>c</b> -----						
<b>d</b> -----						
<b>e</b> -----						
<b>f</b> All other program service revenue .....						
<b>g Total.</b> Add lines 2a-2f .....						
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....					
	<b>4</b> Income from investment of tax-exempt bond proceeds .....					
	<b>5</b> Royalties .....					
	<b>6a</b> Gross rents .....	(i) Real				
		(ii) Personal				
		<b>6b</b> Less: rental expenses .....	<b>6b</b>			
	<b>c</b> Rental income or (loss) .....	<b>6c</b>				
	<b>d</b> Net rental income or (loss) .....					
	<b>7a</b> Gross amount from sales of assets other than inventory .....	(i) Securities				
		(ii) Other				
		<b>b</b> Less: cost or other basis and sales expenses .....	<b>7b</b>			
	<b>c</b> Gain or (loss) .....	<b>7c</b>				
	<b>d</b> Net gain or (loss) .....					
	<b>8a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 .....	<b>8a</b>	358.			
<b>b</b> Less: direct expenses .....	<b>8b</b>					
<b>c</b> Net income or (loss) from fundraising events .....		358.				
<b>9a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>9a</b>					
<b>b</b> Less: direct expenses .....	<b>9b</b>					
<b>c</b> Net income or (loss) from gaming activities .....						
<b>10a</b> Gross sales of inventory, less returns and allowances .....	<b>10a</b>	192,319.				
<b>b</b> Less: cost of goods sold .....	<b>10b</b>					
<b>c</b> Net income or (loss) from sales of inventory .....		192,319.	192,319.			
<b>Miscellaneous Revenue</b>	<b>11a</b> Business Code					
	<b>b</b> -----					
	<b>c</b> -----					
	<b>d</b> All other revenue .....					
	<b>e Total.</b> Add lines 11a-11d .....					
<b>12 Total revenue.</b> See instructions .....		346,837.	192,319.	0.	0.	



**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	42,342.	33,874.	4,234.	4,234.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.	0.	0.	0.
7 Other salaries and wages	114,476.	91,581.	11,448.	11,447.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes	13,090.	10,472.	1,309.	1,309.
11 Fees for services (nonemployees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	4,876.	3,901.	488.	487.
12 Advertising and promotion	8,951.	7,161.	895.	895.
13 Office expenses	37,624.	30,099.	3,763.	3,762.
14 Information technology				
15 Royalties				
16 Occupancy	86,188.	68,950.	8,619.	8,619.
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a <u>Program supplies</u>	1,363.	1,363.		
b <u>Fund Raising</u>	1,016.			1,016.
c <u>PPD exp adj cash basis</u>	110.		110.	
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e.	310,036.	247,401.	30,866.	31,769.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X.

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash – non-interest-bearing.....	158,700.	<b>1</b>	196,965.
	<b>2</b> Savings and temporary cash investments.....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net.....		<b>3</b>	
	<b>4</b> Accounts receivable, net.....		<b>4</b>	
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons.....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B).....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net.....		<b>7</b>	
	<b>8</b> Inventories for sale or use.....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges.....		<b>9</b>	
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.....	<b>10a</b> 18,821.		
	<b>b</b> Less: accumulated depreciation.....	<b>10b</b> 18,821.		<b>10c</b>
	<b>11</b> Investments – publicly traded securities.....		<b>11</b>	
	<b>12</b> Investments – other securities. See Part IV, line 11.....		<b>12</b>	
	<b>13</b> Investments – program-related. See Part IV, line 11.....		<b>13</b>	
	<b>14</b> Intangible assets.....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11.....	4,888.	<b>15</b>	4,889.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33).....	163,588.	<b>16</b>	201,854.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses.....		<b>17</b>	
	<b>18</b> Grants payable.....		<b>18</b>	
	<b>19</b> Deferred revenue.....		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities.....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D.....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons.....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties.....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties.....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D.....	3,758.	<b>25</b>	5,223.
	<b>26 Total liabilities.</b> Add lines 17 through 25.....	3,758.	<b>26</b>	5,223.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33.</b> <input checked="" type="checkbox"/>			
	<b>27</b> Net assets without donor restrictions.....	159,830.	<b>27</b>	196,631.
	<b>28</b> Net assets with donor restrictions.....		<b>28</b>	
	<b>Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33.</b> <input type="checkbox"/>			
	<b>29</b> Capital stock or trust principal, or current funds.....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund.....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds.....		<b>31</b>	
	<b>32</b> Total net assets or fund balances.....	159,830.	<b>32</b>	196,631.
<b>33</b> Total liabilities and net assets/fund balances.....	163,588.	<b>33</b>	201,854.	

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI.

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	346,837.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	310,036.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	36,801.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	159,830.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	196,631.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII.

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
<b>b</b>	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
<b>c</b>	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.		X
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R Part 200, Subpart F?		X
<b>b</b>	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2022**

**Open to Public Inspection**

Name of the organization <b>My Sisters Closet of Monroe County</b> <b>My Sisters Closet</b>	Employer identification number <b>35-2050048</b>
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**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990).)
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8  A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9  An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10  An organization that normally receives (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3)**. Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations .....
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
<b>Total</b>						

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						
4 <b>Total.</b> Add lines 1 through 3.						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						
6 <b>Public support.</b> Subtract line 5 from line 4.						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
7 Amounts from line 4.						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
9 Net income from unrelated business activities, whether or not the business is regularly carried on.						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 <b>Total support.</b> Add lines 7 through 10.						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 <b>First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2022 (line 6, column (f), divided by line 11, column (f)).	14	%
15 Public support percentage from 2021 Schedule A, Part II, line 14.	15	%
16a <b>33-1/3% support test—2022.</b> If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
b <b>33-1/3% support test—2021.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
17a <b>10%-facts-and-circumstances test—2022.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
b <b>10%-facts-and-circumstances test—2021.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions.	<input type="checkbox"/>	

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	68,009.	97,354.	144,771.	56,898.	154,519.	521,551.
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.				194,298.	192,319.	386,617.
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513.						0.
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						0.
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
<b>6 Total.</b> Add lines 1 through 5.	68,009.	97,354.	144,771.	251,196.	346,838.	908,168.
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons.	0.	0.	0.	0.	0.	0.
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.	0.	0.	0.	0.	0.	0.
<b>c</b> Add lines 7a and 7b.	0.	0.	0.	0.	0.	0.
<b>8 Public support.</b> (Subtract line 7c from line 6.)						908,168.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>9</b> Amounts from line 6.	68,009.	97,354.	144,771.	251,196.	346,838.	908,168.
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.			21.	22.		43.
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						0.
<b>c</b> Add lines 10a and 10b.	0.	0.	21.	22.	0.	43.
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						0.
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) See Part VI.			15.	57.		72.
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)	68,009.	97,354.	144,807.	251,275.	346,838.	908,283.

**14 First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2022 (line 8, column (f), divided by line 13, column (f)).	<b>15</b>	99.99 %
<b>16</b> Public support percentage from 2021 Schedule A, Part III, line 15.	<b>16</b>	99.98 %

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for 2022 (line 10c, column (f), divided by line 13, column (f)).	<b>17</b>	0.00 %
<b>18</b> Investment income percentage from 2021 Schedule A, Part III, line 17.	<b>18</b>	0.01 %

**19a 33-1/3% support tests—2022.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

**b 33-1/3% support tests—2021.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization.

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions.

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .		
<b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
<b>b</b> Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?	<b>11a</b>	
<b>b</b> A family member of a person described on line 11a above?	<b>11b</b>	
<b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.</i>	<b>11c</b>	

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>	<b>1</b>	
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.</i>	<b>2</b>	

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>	<b>1</b>	

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	<b>1</b>	
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>	<b>2</b>	
<b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>	<b>3</b>	

**Section E. Type III Functionally Integrated Supporting Organizations**

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
<b>2</b> Activities Test. Answer lines 2a and 2b below.			
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>	<b>2a</b>		
<b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>	<b>2b</b>		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.			
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No," provide details in Part VI.</i>	<b>3a</b>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>	<b>3b</b>		



**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

1  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

<b>Section A – Adjusted Net Income</b>		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

<b>Section B – Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

<b>Section C – Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	

7  Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations** (continued)

<b>Section D – Distributions</b>		<b>Current Year</b>
<b>1</b>	Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>
<b>2</b>	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>
<b>3</b>	Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>
<b>4</b>	Amounts paid to acquire exempt-use assets	<b>4</b>
<b>5</b>	Qualified set-aside amounts (prior IRS approval required – provide details in <b>Part VI</b> )	<b>5</b>
<b>6</b>	Other distributions (describe in <b>Part VI</b> ). See instructions.	<b>6</b>
<b>7</b>	<b>Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>
<b>8</b>	Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions.	<b>8</b>
<b>9</b>	Distributable amount for 2022 from Section C, line 6	<b>9</b>
<b>10</b>	Line 8 amount divided by line 9 amount	<b>10</b>

<b>Section E – Distribution Allocations (see instructions)</b>	<b>(i) Excess Distributions</b>	<b>(ii) Underdistributions Pre-2022</b>	<b>(iii) Distributable Amount for 2022</b>
<b>1</b> Distributable amount for 2022 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2022 (reasonable cause required – explain in <b>Part VI</b> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2022			
<b>a</b> From 2017 . . . . .			
<b>b</b> From 2018 . . . . .			
<b>c</b> From 2019 . . . . .			
<b>d</b> From 2020 . . . . .			
<b>e</b> From 2021 . . . . .			
<b>f Total</b> of lines 3a through 3e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2022 distributable amount			
<b>i</b> Carryover from 2017 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2022 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2022 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2022, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>6</b> Remaining underdistributions for 2022. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>7 Excess distributions carryover to 2023.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2018 . . . . .			
<b>b</b> Excess from 2019 . . . . .			
<b>c</b> Excess from 2020 . . . . .			
<b>d</b> Excess from 2021 . . . . .			
<b>e</b> Excess from 2022 . . . . .			

BAA

Schedule A (Form 990) 2022

**Part VI**

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

**Part III, Line 12 - Other Income**

Nature and Source	2022	2021	2020	2019	2018
Other income		\$ 57.	\$ 15.		
Total	\$ 0.	\$ 57.	\$ 15.	\$ 0.	\$ 0.

Schedule B (Form 990)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

Attach to Form 990 or Form 990-PF. Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2022

Table with 2 columns: Name of the organization, Employer identification number. Row 1: My Sisters Closet of Monroe County, 35-2050048. Row 2: My Sisters Closet.

Organization type (check one):

Filers of:

Section:

- Form 990 or 990-EZ: [X] 501(c)( 3 ) (enter number) organization, [ ] 4947(a)(1) nonexempt charitable trust not treated as a private foundation, [ ] 527 political organization. Form 990-PF: [ ] 501(c)(3) exempt private foundation, [ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation, [ ] 501(c)(3) taxable private foundation.

Check if your organization is covered by the General Rule or a Special Rule.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- [X] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- [ ] For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test... [ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor... [ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor...

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization <b>My Sisters Closet of Monroe County</b>	Employer identification number <b>35-2050048</b>
---	---

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	City of Bloomington 401 North Morton Street Bloomington, IN 47404	\$ 34,400.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	Central IN Grant Fund 615 Alabama St #300 Indianapolis, IN 46204	\$ 22,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	Mariane Glick	\$ 5,102.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
---	-----	\$ -----	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization My Sisters Closet of Monroe County	Employer identification number 35-2050048
--	--

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
-----	N/A ----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----
-----	----- ----- -----	\$-----	-----

Name of organization **My Sisters Closet of Monroe County** Employer identification number **35-2050048**

**Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)..... \$                      *N/A*  
 Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	N/A		
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
-----		-----	
-----		-----	
-----		-----	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
-----		-----	
-----		-----	
-----		-----	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
-----		-----	
-----		-----	
-----		-----	
<b>(e) Transfer of gift</b>			
<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>	
-----		-----	
-----		-----	
-----		-----	

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements
Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2022

Open to Public Inspection

Name of the organization

My Sisters Closet of Monroe County
My Sisters Closet

Employer identification number

35-2050048

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: Line number, (a) Donor advised funds, (b) Funds and other accounts. Rows 1-4 for total number and aggregate values.

- 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property...
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes...

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

- 1 Purpose(s) of conservation easements held by the organization (check all that apply).
Preservation of land for public use, Protection of natural habitat, Preservation of open space, Preservation of a historically important land area, Preservation of a certified historic structure.

Table for line 2: Held at the End of the Tax Year. Columns 2a, 2b, 2c, 2d for total number, acreage, and modified easements.

- 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year
4 Number of states where property subject to conservation easement is located
5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year
8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet...

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

- 1 a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.
b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
(i) Revenue included on Form 990, Part VIII, line 1.
(ii) Assets included in Form 990, Part X.
2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:
a Revenue included on Form 990, Part VIII, line 1.
b Assets included in Form 990, Part X.



**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

- 1 a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1 c    |
| d Additions during the year     | 1 d    |
| e Distributions during the year | 1 e    |
| f Ending balance                | 1 f    |
- 2 a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  Yes  No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII

**Part V Endowment Funds.** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1 a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment \_\_\_\_\_ %
  - b Permanent endowment \_\_\_\_\_ %
  - c Term endowment \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3 a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |                             | Yes    | No |
|-----------------------------|--------|----|
| (i) Unrelated organizations | 3a(i)  |    |
| (ii) Related organizations  | 3a(ii) |    |
- b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R?  **3b**

**Part VI Land, Buildings, and Equipment.** Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land				
b Buildings				
c Leasehold improvements				
d Equipment		14,961.	14,961.	0.
e Other		3,860.	3,860.	0.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				0.

**Part VII Investments – Other Securities.** N/A  
 Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely held equity interests.....		
(3) Other		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 12.) . . . .		

**Part VIII Investments – Program Related.** N/A  
 Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 13.) . . . .		

**Part IX Other Assets.** N/A  
 Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 15.) . . . .	

**Part X Other Liabilities.**  
 Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) Payroll taxes & withholdings	3,863.
(3) PRT IN	1,172.
(4) Sales tax payable	111.
(5) SUTA	77.
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, column (B) line 25.) . . . .	5,223.

**2.** Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII.

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.** N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements .....		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	<b>a</b> Net unrealized gains (losses) on investments .....	<b>2 a</b>		
	<b>b</b> Donated services and use of facilities .....	<b>2 b</b>		
	<b>c</b> Recoveries of prior year grants .....	<b>2 c</b>		
	<b>d</b> Other (Describe in Part XIII.) .....	<b>2 d</b>		
	<b>e</b> Add lines <b>2 a</b> through <b>2 d</b> .....		<b>2 e</b>	
<b>3</b>	Subtract line <b>2 e</b> from line <b>1</b> .....		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	<b>a</b> Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4 a</b>		
	<b>b</b> Other (Describe in Part XIII.) .....	<b>4 b</b>		
	<b>c</b> Add lines <b>4 a</b> and <b>4 b</b> .....		<b>4 c</b>	
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4 c</b> . (This must equal Form 990, Part I, line 12.) .....		<b>5</b>	

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.** N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements .....		<b>1</b>	
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	<b>a</b> Donated services and use of facilities .....	<b>2 a</b>		
	<b>b</b> Prior year adjustments .....	<b>2 b</b>		
	<b>c</b> Other losses .....	<b>2 c</b>		
	<b>d</b> Other (Describe in Part XIII.) .....	<b>2 d</b>		
	<b>e</b> Add lines <b>2 a</b> through <b>2 d</b> .....		<b>2 e</b>	
<b>3</b>	Subtract line <b>2 e</b> from line <b>1</b> .....		<b>3</b>	
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	<b>a</b> Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4 a</b>		
	<b>b</b> Other (Describe in Part XIII.) .....	<b>4 b</b>		
	<b>c</b> Add lines <b>4 a</b> and <b>4 b</b> .....		<b>4 c</b>	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4 c</b> . (This must equal Form 990, Part I, line 18.) .....		<b>5</b>	

**Part XIII Supplemental Information.**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**SCHEDULE O  
(Form 990)**

**Supplemental Information to Form 990 or 990-EZ**

OMB No. 1545-0047

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.

**2022**

Department of the Treasury  
Internal Revenue Service

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

**Open to Public  
Inspection**

Name of the organization

My Sisters Closet of Monroe County  
My Sisters Closet

Employer identification number

35-2050048

**Form 990, Part VI, Line 11b - Form 990 Review Process**

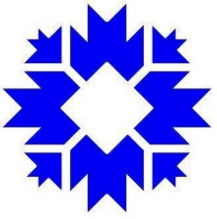
No review was or will be conducted.

**Form 990, Part VI, Line 15a - Compensation Review & Approval Process - CEO & Top Management**

Compensation is reviewed and approved by the board.

**Form 990, Part VI, Line 19 - Other Organization Documents Publicly Available**

No other documents available to the public.



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** New Hope Family Shelter dba New Hope for Families

**Address:**

1140 S Morton Street Bloomington, IN 47408
--

**Phone:** 8123349840

**E-Mail:** operations@newhope4families.org, development@newhope4families.org

**Website:** newhope4families.org

**President of Board of Directors:** Sherry Dunbar-Kruzan

**Name of Executive Director:** Emily Pike

**Phone:** 812-334-9840

**E-Mail:** director@newhope4families.org

**Name of Grant Writer:** Chase Techentin

**Phone:** 812-334-9840

**E-Mail:** operations@newhope4families.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
20	20	75

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

New Hope for Families provides shelter and early learning programs to keep families together and lift every child into a promising future.

## PROJECT INFORMATION

---

Name of the project to be funded:

Early Learning Center Food Program

Total cost of project: \$66,689

Requested amount of Jack Hopkins funding: \$35,000

Number of City residents to be served by this project in 2024: 160

Number of clients to be served by this project in 2024: 180

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Our early learning program, which primarily serves children affected by homelessness, needs bridge funding to stabilize our food program budget against inflation. One of our early learning program's distinctives is providing free, nutritious meals and snacks because we serve a low-income, vulnerable population. We seek \$35,000 in bridge funding to compensate for the increased price of food due to inflation, and the loss of reliable food at the food bank.

New Hope's Early Learning Center is committed to providing free meals because students thrive socially and developmentally with good nutrition, and because we serve a low-income population who cannot always afford consistent, healthy food that's easy to pack for lunches.

Unyielding food price inflation and a loss of reliable supply at the food bank has jeopardized our ability to provide this essential service to our birth-to-five year old students. We have rapidly spent our budget, despite scrupulous attempts to purchase the least expensive, on-sale foods across various vendors. Our peer childcare centers in the community report similar sudden rises in food costs.

New Hope's Early Learning Center covers roughly half of our food program's expenses through the federal Child and Adult Care Food Program. However meaningful, CACFP only reimburses for food expenses, and never at 100%. We anticipate them adjusting the reimbursement soon, as they have not since the pandemic. In the meantime we propose leveraging \$35,000 JHSS funds together with the CACFP and other funds to bridge our food program's expenses while we seek long-term funding sources.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***



# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

(same as agency address)

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Children and Adult Care Food Program (CACFP) which reimburses a proportion of each meal served based on the children enrolled and their income, General fundraising (already designated)

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We can submit a quarterly claim demonstrating the number of meals served and the payroll of the Early Learning Center's Chef until funds are drawn down. The bridge funds would subsidize the food program's staff time, as the other major granter, CACFP, will reimburse food expenses only. The requested amount would stabilize the program for 6 months while we seek long term funding.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Jack Hopkins granted funds would join the above mentioned CACFP funds which are already secured and reimbursable both during the grant period and for the long-term.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

The food program will leverage the funds listed above and volunteer labor for food prep, and food bank food when it can be used to keep costs low without compromising quality.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	3 Months of Food Program	17,500
Priority #2	3 Months of Food Program	17,500
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		35,000

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

New Hope's Early Learning Food Program is integral to our work addressing social service needs. The Food Program most clearly addresses the SCAN's Needs Assessment in the areas of: 1) Meeting the Essentials (Hunger and Food Insecurity) 2) Early Childhood Education, and 3) Earning a Living

1) The funded activities will directly affect our ability to distribute free, nutritious meals to households who are food insecure. We reserve half of our enrollment spots for children from families affected by homelessness who come from the lowest income brackets in our city. Regardless of income, we provide meals and snacks to children without a complicated application process or cutoffs to ensure no child goes hungry at our school. The food program provides healthy snacks and meals and our chef provides takeaway food and often gives food away to families and children to take home.

2) We address the need for high-quality early childhood education first by achieving a Level 3 Paths to Quality rating (recognized as "excellent" in the State of Indiana), and second by offering free food to children. Children can make little use of our high quality education if they are hungry or malnourished. Therefore the funded activities will strengthen our ability to offer early learning, and ensure that children are in the best position to realize all of its benefits.

3) We help families earn a living by offering childcare free of charge for families living in our shelter program, and by helping others apply for and use the CCDF voucher, which subsidizes the cost of early learning. The Food Program activities make it easy for families to stay enrolled in school and remain employed. Rather than choosing between paying a fee or creating school-ready lunches, low-income families can instead use their cash on essentials like transportation to work.

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This year, we need a one-time bridge fund to ensure our food program can deliver nutritious meals to children. The spike in food prices combined with the drop in food bank supplies have left us in a temporary emergency. New Hope is developing new relationships with other food granters in an attempt to compensate long term, but in the meantime requests this bridge.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

We know that in order to learn, grow, and thrive, children must have their most basic needs met. Having access to basic nutritional needs is prerequisite to being prepared socially, emotionally, and academically for kindergarten. Furthermore, we know that participation in a high quality early learning program has far-reaching outcomes for young children, particularly children from low-income backgrounds. In particular, they are more likely to succeed in formal schooling, attend college, avoid incarceration, and report general wellbeing. Having access to nutritious meals and snacks allows children from all backgrounds to make best use of our high-quality early learning center. Moreover, when children remain enrolled and thriving, their parents can remain employed and recover from the crisis of homelessness.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

We can track the number of healthy meals and snacks served to children in our early learning program. We anticipate serving between 13,000 and 15,000 meals and snacks in this six-month period and that at least 65% of the children served will come from food insecure homes.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

**New Hope for Families Early Learning Food Program Proposed Budget***Jack Hopkins Social Services 2024*

<b>Project Fund Sources</b>	Jack Hopkins	Other funders	<b>Total</b>
Jack Hopkins	\$35,000.00		\$35,000.00
CACFP Grant		\$24,000.00	\$24,000.00
General Fund		\$7,689.00	\$7,689.00
<b>Total Project Funds</b>	\$35,000.00	\$31,689.00	<b>\$66,689.00</b>
<b>Project Expenses</b>			
Food Program Groceries		\$24,000.00	\$24,000.00
Food-related Payroll Expenses	\$35,000.00	\$5,689.00	\$40,689.00
Non-food Equipment and Supplies		\$2,000.00	\$2,000.00
<b>Total Project Expenses</b>	\$35,000.00	\$31,689.00	<b>\$66,689.00</b>

Notes: The Food Program has two major expense types, the food itself which is largely covered by a different, long-term grant, and the payroll of our chef who prepares nutritious meals and snacks from whole foods and the classroom professional who serve it. Our budget has been suddenly outpaced by inflation and a loss of reliable food supplies at the food bank. We seek bridge funds for our chef's payroll while we secure longer term funding.

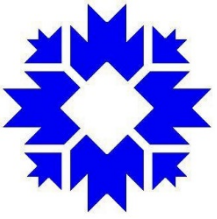
# New Hope for Families

## Statement of Activity

July 2022 - June 2023

	TOTAL
Revenue	
41000 Earned Revenue	437,294.28
42000 Unearned Revenue	
43000 Donations	2,000.00
43100 Individual Donations	367,736.88
43135 Event-Related Donations	236,433.09
43200 Corporate Donations	168,928.55
43300 Social & Religious Org Donations	26,479.10
<b>Total 43000 Donations</b>	<b>801,577.62</b>
44000 Government Grants	
44100 Fed/State Government Grants	308,881.46
44300 Local Government Grants	886,259.85
<b>Total 44000 Government Grants</b>	<b>1,195,141.31</b>
45000 Nongovernment Grants	409,010.33
<b>Total 42000 Unearned Revenue</b>	<b>2,405,729.26</b>
Uncategorized Revenue	858.04
<b>Total Revenue</b>	<b>\$2,843,881.58</b>
GROSS PROFIT	<b>\$2,843,881.58</b>
Expenditures	
50000 Personnel Expenses	1,277,732.19
60000 Non-Personnel Expenses	
61000 Administrative Expenses	
61010 Office Supplies	7,258.61
61020 Postage	509.34
61030 Insurance	38,100.51
61040 Technology - Hardware	4,151.02
61050 Technology - Software & Subscriptions	12,927.06
61060 Vehicle Expenses	1,285.52
61070 Other Administrative Expenses	138.00
<b>Total 61000 Administrative Expenses</b>	<b>64,370.06</b>
62000 Facility Expenses	125,931.30
63000 Program Expenses	119,859.93
64000 Fundraising Expenses	97,557.66
<b>Total 60000 Non-Personnel Expenses</b>	<b>407,718.95</b>
66000 Interest Paid	58,035.03
Depreciation Expense	156,315.70
<b>Total Expenditures</b>	<b>\$1,899,801.87</b>
NET OPERATING REVENUE	<b>\$944,079.71</b>
Other Revenue	\$6,672.20
Other Expenditures	\$13,559.90
NET OTHER REVENUE	<b>\$ -6,887.70</b>
NET REVENUE	<b>\$937,192.01</b>





**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** New Leaf, New Life

**Address:**

1010 S. Walnut St. Suite H Bloomington, IN. 47401
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**Phone:** 317-366-7916

**E-Mail:** grants-manager@newleafnewlife.org

**Website:** newleafnewlife.org

**President of Board of Directors:** Bobby Overman

**Name of Executive Director:** Jordan McIntire

**Phone:** 317-366-7916

**E-Mail:** grants-manager@newleafnewlife.org

**Name of Grant Writer:** Jordan McIntire

**Phone:** 317-366-7916

**E-Mail:** grants-manager@newleafnewlife.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
3	1	~10

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

To support individuals who are currently/recently incarcerated with their reentry back into our community.

## PROJECT INFORMATION

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Name of the project to be funded:

Reducing Recidivism: Reentry Case Management

Total cost of project: \$34,560.00

Requested amount of Jack Hopkins funding: \$8,846.96

Number of City residents to be served by this project in 2024: 1,460

Number of clients to be served by this project in 2024: 1,620

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$8,846.96 to assist with salary expenses for two of our full-time case managers. Our case managers provide critical services to our clients (free of charge), and have lived experience with incarceration themselves. Our case managers assist some of our community's most vulnerable individuals with obtaining housing, treatment, employment, SNAP & HIP benefits, cell phones, personal identification documents, and other necessary resources to successfully navigate reentry. Through our reentry support, we aim to reduce our local recidivism rates and keep our neighbors out of jail.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

N/A

How do your missions, operations and services complement each other?

N/A

What is the existing relationship between agencies?

N/A

How will communication and coordination change as a result of the project?

N/A

Explain any challenges and steps you plan to take to address those challenges.

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

Same as agency address:  
1010 S Walnut St  
Suite H  
Bloomington, IN 47401

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Funding from donors: \$25,713.04, confirmed

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan on submitting claims for reimbursement based upon the 2024 Jack Hopkins claim dates. Typically, we submit 3 reimbursement requests (mid-August, early October, late November). Steps that precede a complete draw down of funds include staff members completing work hours.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Completion of our project is not dependent on other anticipated funding.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We try to limit salary expenses by leveraging volunteers as much as possible. On average, we have around 10 volunteers per month that each contribute around 15 volunteer hours. This equates to 150 hours per month. Based on its newest value of volunteer time report (Independent Sector, Do Good Institute), the value of a volunteer hour is estimated to be \$31.80 - meaning we leverage \$4,770 in volunteer work hours each month.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Salary Support - Staff #1	\$4,423.48
Priority #2	Salary Support - Staff #2	\$4,423.48
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$8,846.96</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

While jails are intended to promote public safety, they're increasingly utilized to respond to medical & economic problems unrelated to public safety issues. As a result, local jails are filled with people who need medical care and social services, many of whom cycle in and out of jail without receiving the help they need. The Prison Policy Initiative (2019) found that people who are jailed have higher rates of social, economic, and health problems, and repeated arrests are related to poverty and high rates of mental illness & substance use disorders.

Locally, the SCAN (2012) found that 33% of those who are housing insecure in Monroe County struggle with addiction, lending itself to increased incarceration rates. The Indiana State Department of Health (2020) reported a 26.6% increase in incidents of opioid emergency department visits between 2017-2020. With a majority of Monroe County inmates experiencing incarceration due to substance abuse issues, it's apparent that increased reentry support – the process of guiding the currently/recently incarcerated through the process of acclimating to free society – is extremely important in assisting these individuals struggling with social, economic, and health related problems, including substance use disorders, in an attempt to reduce recidivism and drug use rates.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

As funding from the COVID-19 pandemic begins to subside, we're always looking for innovative ways to raise funds, especially for staff salaries. Through 2024, we'll continue to leverage donation funding and volunteer work hours while we maintain gathering strong program data showing promising recidivism rates. We plan on using this data to apply for state and/or federal funding in the future so we can continue offering free services and resources to our clients.



**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

High incarceration rates have detrimental effects on communities due to factors such as loss of working-age adults in the community, increased exposure to infectious diseases, and shifting public resources from health and social supports to the penal system. Emerging evidence suggests that high incarceration rates may directly contribute to poor population-level health and produce health inequalities (Gifford, 2019).

By focusing our efforts on reducing recidivism rates, we're working to directly combat these issues in our community. That is, by assisting individuals with obtaining stable housing, employment, health insurance, and other services, we're aiming to reduce recidivism rates and keep people out of jail. These efforts help to limit the negative impacts that incarceration rates have on our families and the community at-large. Currently, we're maintaining recidivism rates on 867 clients and our collective recidivism rate is 25%. For clients we've assisted with housing (deposit &/or first month's rent)(109), our recidivism rates are 13%. For perspective, the Indiana Department of Corrections recidivism rate is 32.5%.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Within the Jack Hopkins funding period (mid-June through December 1, 2024), we will:

- Provide case management services to at least 1,620 individuals
- Assist at least 40 clients with obtaining employment
- Assist at least 12 clients with obtaining housing (we will support with deposit and/or first month's rent expenses)
- Maintain a collective recidivism rate of 25% or less

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

A majority of our clients (~99%) fall within HUD's guidelines of low income / experiencing poverty. Additionally, at least 90-95% of our clients identify as living within city limits.

For the year 2023, New Leaf, New Life:

- Served over 3,000 individuals
- Received and responded to over 1,700 letters from individuals incarcerated
- Assisted 55 individuals with signing up for SNAP/HIP benefits
- Obtained copies of birth certificates for 111 individuals
- Supported 73 individuals with gaining employment
- Distributed over 160 reentry kits (backpack, clothing, bus tickets, hygiene supplies)
- Distributed over 1,700 bus tickets
- Assisted 65 individuals (financially) with obtaining housing

## 2024 Jack Hopkins Project Budget

<b>New Leaf, New Life</b>	<b>Reducing Recidivism: Reentry Case Management</b>		
<b>Total Project Cost:</b>		<b>\$34,560.00</b>	
	TOTALS	OTHER SOURCES	JHSS GRANT
<b>FUNDS</b>			
JHSS Grant	\$8,846.96		\$8,846.96
Other Income Sources	\$25,713.04	\$25,713.04	
<b>TOTAL PROJECT FUNDS FROM ALL SOURCES</b>	<b>\$34,560.00</b>	<b>\$25,713.04</b>	<b>\$8,846.96</b>
<b>EXPENSES (6 months)</b>			
Staff Time	\$34,560.00	\$25,713.04	\$8,846.96
<b>TOTAL PROJECT EXPENSES</b>	<b>\$34,560.00</b>	<b>\$25,713.04</b>	<b>\$8,846.96</b>

Total JH's 2024 Request: \$8,846.96

New Leaf, New Life Pay Periods													
	6/17 - 6/30/24	7/1 - 7/14/24	7/15 - 7/28/24	7/29 - 8/11/24	8/12 - 8/25/24	8/26 - 9/8/24	9/9 - 9/22/24	9/23 - 10/6/24	10/7 - 10/20/24	10/21 - 11/3/24	11/4 - 11/17/24	11/18 - 12/1/24	Total Pay
Nikki Wiles	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$11,520.00
Stacy Flynn	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$11,520.00
Misty James	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$960.00	\$11,520.00
<b>TOTAL SALARY EXPENSE</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$2,880.00</b>	<b>\$34,560.00</b>
Funding Secured	\$2,880.00	\$2,880.00	\$2,880.00	\$2,880.00	\$2,880.00	\$2,880.00	\$2,880.00	\$1,713.04	\$960.00	\$960.00	\$960.00	\$960.00	\$25,713.04
REQUESTED FROM JACK HOPKINS 2024	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,166.96	\$1,920.00	\$1,920.00	\$1,920.00	\$1,920.00	\$8,846.96

# New Leaf New Life

## Profit and Loss

January - December 2023

	TOTAL
Income	
4000 Revenue from Direct Contributions	550.00
4010 Individual Contributions	53,556.89
4020 Corporate Contributions	5,284.27
<b>Total 4000 Revenue from Direct Contributions</b>	<b>59,391.16</b>
4300 Non-government Grants	237.50
4330 Foundation/Trust Grants	
4330.1 Community Foundation of Monroe County	11,644.71
4330.2 Community Foundation of Middle Tennessee	500.00
4330.3 Smithville Foundation	4,482.00
4330.4 Community Foundation of ST. Joseph County	5,000.00
4330.50 United Way	2,374.62
<b>Total 4330 Foundation/Trust Grants</b>	<b>24,001.33</b>
4340 Nonprofit Organization Grants	1,128.14
4340.1 St. Mark's Methodist Church Grant	718.31
<b>Total 4340 Nonprofit Organization Grants</b>	<b>1,846.45</b>
<b>Total 4300 Non-government Grants</b>	<b>26,085.28</b>
4500 Government Grants	
4530 Local Government Grants	49,526.00
4530.2 Jack Hopkins Grant	15,141.00
4530.4 CDBG COVID Grant	10,059.00
4530.5 Bloomington Township Trustee Grant	1,000.00
<b>Total 4530 Local Government Grants</b>	<b>75,726.00</b>
<b>Total 4500 Government Grants</b>	<b>75,726.00</b>
4800 Revenue from Other Sources	
5490 Misc revenue	196.23
5490.9 Uncategorized Income	325.00
<b>Total 5490 Misc revenue</b>	<b>521.23</b>
<b>Total 4800 Revenue from Other Sources</b>	<b>521.23</b>
<b>Total Income</b>	<b>\$161,723.67</b>
<b>GROSS PROFIT</b>	<b>\$161,723.67</b>
Expenses	
5000 Salaries and Wages	
5010 Payroll	88,146.16
5020 Payroll Taxes	6,743.18
5030 Worker's Compensation	397.00
<b>Total 5000 Salaries and Wages</b>	<b>95,286.34</b>

# New Leaf New Life

## Profit and Loss

January - December 2023

	TOTAL
6000 Professional Fees	
6010 Accounting Fees	2,000.00
6010.1 QuickBooks Subscription	1,804.00
<b>Total 6010 Accounting Fees</b>	<b>3,804.00</b>
<b>Total 6000 Professional Fees</b>	<b>3,804.00</b>
6051 Insurance - BoD	3,607.00
7000 Transition Center Program	
7100 Office Supplies	3,303.19
7110 Postage	943.60
7120 Personal Care Items	67.37
7125 Re Entry Kits	965.14
7130 Glasses	1,303.02
7140 Hygiene	200.66
7150 Clothing and Glasses	656.75
7160 IDs and Personal Documents	1,355.75
7170 Transportation	106.95
7170.1 Bus passes	900.00
<b>Total 7170 Transportation</b>	<b>1,006.95</b>
7180 Food	80.00
7190 Programming	28,582.62
7210 Utilities	
7210.1 Phone-AT&T	1,404.60
7210.2 Energy-Duke Energy	1,637.66
7210.3 Natural Gas	1,090.28
<b>Total 7210 Utilities</b>	<b>4,132.54</b>
7300 Maintenance and Repairs	50.00
9000 Fundraising Expenses	
9010 Advertising	711.04
<b>Total 9000 Fundraising Expenses</b>	<b>711.04</b>
<b>Total 7000 Transition Center Program</b>	<b>43,358.63</b>
8000 Jail Program	
8100 Office Supplies	115.85
Supplies & Materials	
8120 Education	350.78
8130 Glasses	
8130.1 Reimbursements-Eye glasses	127.98
<b>Total 8130 Glasses</b>	<b>127.98</b>
<b>Total Supplies &amp; Materials</b>	<b>478.76</b>
<b>Total 8000 Jail Program</b>	<b>594.61</b>
PayPal Fees	188.83

# New Leaf New Life

## Profit and Loss

January - December 2023

	TOTAL
Payroll Expenses	
Wages	500.00
<b>Total Payroll Expenses</b>	<b>500.00</b>
<b>Total Expenses</b>	<b>\$147,339.41</b>
NET OPERATING INCOME	<b>\$14,384.26</b>
NET INCOME	<b>\$14,384.26</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

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**Lead Agency Name:** People and Animal Learning Services

**Address:**

7644 W. Elwren Rd. Bloomington, IN 47403
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**Phone:** 812-336-2798

**E-Mail:** info@palstherapy.org

**Website:** www.palstherapy.org

**President of Board of Directors:** Chris Smith

**Name of Executive Director:** Christine Herring

**Phone:** 812-336-2798

**E-Mail:** info@palstherapy.org

**Name of Grant Writer:** Christine Herring

**Phone:** 812-336-2798

**E-Mail:** info@palstherapy.org



## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
7	11	72

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

PALS promotes joy, quality of life, better health, and empowerment by providing therapeutic programs with horses.

By providing a caring, safe, and challenging environment, PALS will foster growth and individual achievement of all participants that will enable them to reach their highest potential.

## PROJECT INFORMATION

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Name of the project to be funded:

Sensory Trail emergency and maintenance vehicle

Total cost of project: \$17,809

Requested amount of Jack Hopkins funding: \$12,809

Number of City residents to be served by this project in 2024: \_\_\_\_\_

Number of clients to be served by this project in 2024: \_\_\_\_\_

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

PALS is requesting \$12,809 for the purchase of a UTV for our sensory trail.

In 2023, PALS completed a year long project of the PALS Sensory Trail. This trail was an \$80k project that created an interactive experience designed for our clients to participate in activities that engage their five senses. Along the half-mile trail clients will have the opportunity to ride or walk their horses through 10 stations that support and encourage sensory perception. This experience in nature is designed specifically for those with autism spectrum disorder and other developmental differences.

The purchase of a UTV is essential as a safety retrieval vehicle for clients in the event of an emergency or in the event they are unable to complete the ride and have mobility issues.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Is the property zoned for your intended use?       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

# PROJECT COSTS

---

**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We currently have a restricted donation from a private donor for \$5000 toward the purchase of this emergency and maintenance UTV.

# FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1		
Priority #2		
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

PALS currently serves over 70 clients with various disabilities. With the completion of our 1/2 mile sensory trail, riders can enjoy an outdoor trail riding experience with stations that focus on each of our senses. Because we serve clients with a variety of physical, social, emotional and cognitive disabilities, we need a vehicle to safely transport a client back in the event they can no longer complete a ride, or in the event of an emergency.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

We are requesting a one time investment of \$12,809 to add to a \$5000 private donation to purchase the UTV for a total cost of \$17,809

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The procurement of an emergency vehicle for our sensory trail will benefit the safety and well-being of all our riders who enjoy the trail. Without such a vehicle, we cannot safely utilize the trail. It is essential for the safety of our clients for many years to come.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Outcome measures would include the added safety measures of being able to safely return a rider who can no longer complete the trail ride, either because of an emergency dismount or accidental dismount while on the trail.



## **OTHER COMMENTS** *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

### 2024 Jack Hopkins Budget

PALS		Trail UTV Safety vehicle	
Total Project Cost		\$17,809	
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			\$12,809
Other Grants		0.00	
Other Income Sources		5,000.00	
<b>TOTAL PROJECT FUNDS</b>	<b>\$17,809</b>	<b>\$5000</b>	<b>\$12,809</b>
<b>EXPENSES</b>			
Cost of UTV	\$17,809		
<b>TOTAL PROJECT EXPENSES</b>	<b>\$17,809</b>		



Product Quotation  
 Quotation Number: **RD385318**  
 Quote Sent Date: **Mar 06, 2024**  
 Expiration Date: **Apr 05, 2024**

Prepared By  
**Rhett Dallas**  
 Phone: 812-369-6778  
 Email: rdallas@bobcatoflettsville.com

Customer  
**People & Animals Learning Services**  
 Phone: +18123203633

Contact

Dealer  
**Bobcat of Bloomington, IN, Bloomington, IN**

Item Name	Item Number	Quantity	Price Each	Total
<b>UV34 Gas Utility Vehicle</b>	M1503	1	20,136.00	20,136.00
<b>Standard Equipment:</b>				
Engine				
Liquid Cooled Engine				
40 HP Gas EFI Engine				
Pressurized Oiling System with Spin On Filter				
Engine Protection Oil Pressure & Water Temp				
High Capacity Air Filter				
49 State Emission Compliant				
Drive System				
CVT (Continuous Variable Transmission)				
Sealed CVT Cover w/remote intake & exhaust				
Four Wheel Drive 3 Drive Modes				
Forward Travel, Two Range (H/L)				
Integrated In-Transmission Park (P)				
Brakes - 4 Wheel, Hydraulic Disc with Dual-Bore				
Front Calipers				
CV Guard, Front				
Shaft Drive with CV Joints				
Suspension & Steering				
Front - Independent, Dual A Arm				
Rear - Independent, Dual A Arm				
Adjustable Front and Rear Coil Over Shocks				
Rack & Pinion				
Electric Power Steering Assist				
Tilt Steering Column				
Operator Compartment				
Beverage Holder (4)				
60/40 Split Bench Seats (3 Occupants)				
Under Seat, Upper & Lower Dash Storage				
Sealed Glove Box Storage				
3 Seat Belts with 3 Point Restraint				
Tires				
All Terrain Industrial (8 ply)				
Front/Rear, 26x10 12				
<b>MY21 UV34 GAS (FULFILL FROM DEALER STOCK)</b>	M1503-R00-Y21	1	0.00	0.00
<b>Roof - Sport Std</b>	7340676	1	510.49	510.49
<b>Windshield - Poly</b>	7342427	1	541.49	541.49
<b>UV34 Gas EPS Base Package</b>	M1503-P01-C02	1	0.00	0.00
Sales Program				
<i>In Lieu of Financing Rebate: US Jan-Mar 2024</i>		1	500.00	- 500.00

Wheels  
 Front/Rear, 12x6 Orange Steel Rim

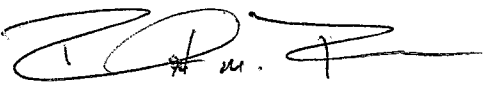
Electrical  
 Headlights, High & Low Beams 4-35 Watts  
 LED Tail & Brake Lights  
 6 Outlet Accessory Pwr Bar  
 75 Amp/900W Stator  
 575 CCA Battery

Instrumentation Panel  
 Indicator Lights: Glow Plug (Diesel Only), Seat Belt Reminder, High Beam On, Engine Oil Pressure (Diesel only), Engine Temp High, Service Power Steering and Service Engine.  
 LCD Display: Speedo, Engine Temp, Engine RPM, Volt, Trip and Hour Meter, Tachometer, Fuel Level, Clock, Drive Mode, Odometer, Service Reminder and Gear Position.

Cargo Box and Frame  
 Composite Cargo Box w/ Cylinder Lift Assist  
 Quick Latch Tailgate w/ Single Latch  
 Integrated Box Accessory System  
 Rear Receiver Hitch - 2 in.  
 Full Chassis Skid Plates  
 ROPS (Roller Over Protective Structure)

Warranty  
 1 year/1000 hours

Total for UV34 Gas Utility Vehicle	<b>20,687.98</b>
Quote Total - USD	20,687.98
Discount	
<i>BOBCAT OF ELLETTSVILLE</i>	-2,878.98
Sales total before Taxes	17,809.00
Taxes	0.00
<b>Quote Total - USD</b>	<b>17,809.00</b>

Sales Rep Signature:  3/6/24

**Customer Acceptance:**  
 Quotation Number: RD385318

Purchase Order: \_\_\_\_\_

**Authorized Signature:**

Print: \_\_\_\_\_ Sign: \_\_\_\_\_

Date: \_\_\_\_\_ Email: \_\_\_\_\_ Tax Exempt: Y  / N

# Sensory Trail

The PALS Sensory Trail is an interactive experience designed for our clients to participate in activities that engage their five senses. Along the half-mile trail, clients will have the opportunity to ride or walk their horses through 10 stations that support and encourage sensory perception. This interactive experience in nature is designed specifically for those with autism spectrum disorder and other developmental differences.

**The trail will be complete at the end of summer 2023!**

## Station Sneak Peek



## Trail footing was completed in 2022 thanks to these sponsors:



More station info available on our [Trail page!](https://www.palstherapy.org/sensory-trail)  
[palstherapy.org/sensory-trail](https://www.palstherapy.org/sensory-trail)

**People and Animal Learning Services**  
**Profit & Loss**  
 January through December 2023

	<u>Jan - Dec 23</u>
<b>Ordinary Income/Expense</b>	
<b>Income</b>	
4000 · Program Income	226,708.46
4100 · Facility Income	18,375.00
4200 · Development Income	306,334.00
5009 · Returned Check Charges	19.00
<b>Total Income</b>	551,436.46
<b>Gross Profit</b>	551,436.46
<b>Expense</b>	
6000 · Personnel	341,025.97
6100 · Program Support	63,800.71
6200 · Facility	62,554.06
6300 · Development	28,490.09
6400 · Financing	21,451.60
6999 · Bad Debt	1,465.00
7009 · Bank Service Charges	23.19
<b>Total Expense</b>	518,810.62
<b>Net Ordinary Income</b>	32,625.84
<b>Other Income/Expense</b>	
<b>Other Income</b>	
7200 · Reimbursement Items	2,855.67
7300 · Sale of Non-Asset Items	300.00
7400 · House Rental	10,000.00
7500 · Miscellaneous Income	470.37
<b>Total Other Income</b>	13,626.04
<b>Other Expense</b>	
8000 · Reimbursable Expenses	1,400.49
8100 · Gain/Loss Sale of Assets	-1,721.72
8200 · Reconciliation Discrepancies	-238.42
8300 · Depreciation	1,406.22
8400 · Rental House Expenses	1,504.96
8500 · Other Miscellaneous Expense	107.00

12:05 PM

03/27/24

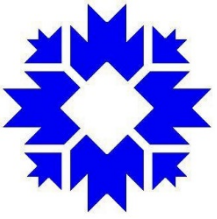
Accrual Basis

**People and Animal Learning Services**  
**Profit & Loss**  
January through December 2023

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	<u>Jan - Dec 23</u>
Total Other Expense	<u>2,458.53</u>
Net Other Income	<u>11,167.51</u>
Net Income	<u><u>43,793.35</u></u>





**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** Planned Parenthood Great Northwest, Hawai'i, Alaska, Indiana, Kentucky

**Address:**

200 S. Meridian St., Ste 400 Indianapolis, IN 46225
--

**Phone:** (317) 210-9333

**E-Mail:** Steven.Conrad@ppgnaik.org

**Website:** www.ppgnaik.org

**President of Board of Directors:** Kyan Olanna, JD

**Name of Executive Director:** Rebecca L. Gibron

**Phone:** (206) 861-7511

**E-Mail:** Rebecca.Gibron@ppgnaik.org

**Name of Grant Writer:** Steven Conrad

**Phone:** (317) 210-9333

**E-Mail:** Steven.Conrad@ppgnaik.org



## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
436	146	7,398

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Together we advocate, educate, and provide exceptional health care supporting sexual health, wellness, and reproductive freedom — without judgment, without fear, without fail.

## PROJECT INFORMATION

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Name of the project to be funded:

Safety-Net Sexual and Reproductive Health Services

Total cost of project: \$70,000

Requested amount of Jack Hopkins funding: \$7,500

Number of City residents to be served by this project in 2024: 98

Number of clients to be served by this project in 2024: 131

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

PPGNHAIK respectfully requests a grant of \$7,500 to provide low-to-no cost access to sexual and reproductive health services for patients who are uninsured, under-insured, and/or living at or below 150 percent of the federal poverty level. The safety-net services grant funding will help provide include: (1) pregnancy testing, evaluation, counseling, and referrals; (2) contraception; (3) HIV/STI testing, treatment, and/or inoculation; (4) cervical cancer screening, advanced diagnostics, and care; (5) gender affirming hormone care; and (6) wellness exams. Please note, PPGNHAIK no longer provides abortion care or miscarriage management.

PPGNHAIK is a leading provider of safety-net sexual and reproductive health services, and many of our patients need financial assistance to access care. Over the past 12 months, PPGNHAIK served 2,722 unduplicated patients at our Bloomington health center, of whom: 66 percent reported an annual income at or below 150 percent of the federal poverty level; and 66 percent were uninsured or on Medicaid. PPGNHAIK provided \$65,491 worth of discounted services to Bloomington patients this past year. There is a high demand for safety-net health services in Bloomington, and PPGNHAIK's ability to meet the need is dependent on grants and philanthropic support. Thank you for your consideration of a grant.

# COLLABORATIVE PROJECTS

---

**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

No other organizations will be directly collaborating on the provision of clinical care at PPGNHAIK's Bloomington health center. However, PPGNHAIK continuously works with a wide network of health providers and social service agencies. Most frequently, PPGNHAIK's role is to accept referrals when patients are turned away from other providers due to their insurance-status. As a safety-net provider, PPGNHAIK will accept all patients no matter their ability to pay for care. In certain cases, PPGNHAIK will have to refer patients outside of our service network for specialized and/or follow-up care.

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

421 S. College Ave.  
Bloomington, IN 47403

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Individual Donors - \$47,180 - Pending (ongoing, annual fundraising)  
Sophia Travis Community Service Grant - \$5,320 - Confirmed  
Bloomington Township Trustee - \$5,000 - Confirmed  
Wahl Family Charitable Trust - \$5,000 - Confirmed

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

If awarded a grant, PPGNHAIK will create a special JHSSF billing code within our electronic medical records system. Our Bloomington health center manager will track usage of the discount code. Patients are provided financial assistance on a sliding-scale basis, and PPGNHAIK will apply the grant discount code as needed for qualifying patients. PPGNHAIK will then redact HIPAA-protected information and submit electronic medical records with claims for reimbursement pursuant to the claims schedule. Once the discount code has been used to subsidize care up to \$7,500, PPGNHAIK will submit our final claim, final report, and we will remove the discount code from our system.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

PPGNHAIK continuously fundraises for patient financial assistance in Bloomington and at all our health center locations. The majority of philanthropic support for patient financial assistance comes from individual donors throughout the year. PPGNHAIK provides patient financial assistance on an ongoing basis as we secure philanthropic support.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

PPGNHAIK utilizes grants from the City of Bloomington Common Council to leverage other grants and gifts from supporters in Monroe County. Many supporters want to see that we receive Council support when making their contributions. Furthermore, PPGNHAIK retains many patients with private insurance who once relied on us for grant-funded assistance. Our “Patient Supporter Campaign” teaches folks that private insurance reimbursements greatly support our ability to subsidize care for patients who are uninsured. These formerly uninsured patients choose to continue their care at Planned Parenthood after obtaining insurance as a way to financially support us.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Contraception	\$5,000
Priority #2	HIV/STI Services	\$1,000
Priority #3	Cancer Screenings	\$750
Priority #4	Gender Affirming Hormones	\$500
Priority #5	Pregnancy Tests	\$250
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$7,500</b>

# JACK HOPKINS FUNDING CRITERIA

---

## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Within the Service Community Assessment of Needs, there are several health, social, and economic outcomes indicating a lack of equitable access to health services in Monroe County. In 2023, the Monroe County chlamydia infection rate was 589.1 cases per 100,000 people, which is higher than both the state and national average. Monroe County performs better than most Indiana counties regarding teen birth and unintended pregnancy (thanks to safety-net providers like PPGNHAIK); however, negative sexual and reproductive health outcomes are impacting Black, Indigenous, and/or People of Color (BIPOC) residents at disproportionately high rates. The teen birth and HIV/STI incidence rates for BIPOC youth and young adults in Monroe County are double those of their white peers. Furthermore, the 2023 childhood poverty rate remains high at 14 percent; the single-parent household rate is 22 percent; 10 percent of adults in Monroe County are uninsured; and 5 percent of youth are uninsured.

Income and insurance-status remain significant barriers to care for folks trying to access health services. For Monroe County to achieve its health and economic equity goals, it is imperative that all people - regardless of their race, income, or insurance-status - have access to sexual and reproductive care.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

PPGNHAIK is seeking operational support to cover the cost of health services for patients who are uninsured and/or cannot afford to pay. PPGNHAIK continuously fundraises for patient financial assistance. The need for subsidized services usually outweighs our available grant/donor funds; nevertheless, we always provide care to patients no matter their ability to pay and no matter our current balance of philanthropic support. Maintaining a net-income neutral health center operation is challenging, particularly following Indiana's abortion ban. We are working to increase patient volume by introducing new services like vasectomy and menopausal care.

## **LONG-TERM BENEFITS** (200 words or less)

### **How will your project have broad and long-lasting benefits for our community?**

The long-term impact of PPGNHAIK's work is improved health and economic equity in Monroe County. Published by the National Poverty Center (NPC), the research study "Do Family Planning Programs Decrease Poverty? Evidence from U.S. Census Data" reveals that, yes, family planning and sexual health programs are successful both for short-term and long-term reductions in poverty. Research has proven that communities with equitable access to sexual and reproductive health services experience greater family stability; greater household incomes; more family resources for children; and more community resources for children and families.

Decades of research prove that people with access to sexual and reproductive health services are significantly more likely to graduate high school, pursue and complete higher education, participate in the workforce, establish stable relationships, and achieve or maintain economic stability. PPGNHAIK's work reduces HIV/STI transmission, reduces cancer mortality, reduces teen pregnancy, reduces unintended pregnancy, reduces single-parent households, reduces infant and maternal mortality, and significantly reduces the childhood poverty rate. Sexual and reproductive health outcomes are intricately linked to social and emotional health outcomes as well. By providing access to sexual and reproductive care, PPGNHAIK is helping people achieve a happier, healthier, and wealthier future.

## **OUTCOME INDICATORS** (100 words or less)

### **Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Complemented by PPGNHAIK's other sources of funding for patient financial assistance, this grant will help us accomplish the following:

- 1) ~56 patients will receive financial assistance to the contraception of their choice.
- 2) ~30 patients will receive financial assistance to access HIV/STI services.
- 3) ~15 patients will receive financial assistance to access pregnancy testing and evaluation.
- 4) ~10 patients will receive financial assistance to access cancer screenings
- 5) ~10 patients will receive financial assistance to access gender affirming hormone care.
- 6) ~10 patients will receive financial assistance to access wellness exams.



## **OTHER COMMENTS** *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

PPGNHAIK can ensure that no grant dollars will be used to subsidize the cost of abortion care. When PPGNHAIK obtains a positive pregnancy test is obtained, the patient is offered information on prenatal care and delivery, infant care, foster care, adoption, and pregnancy termination. This information is given in a neutral, factual, and non-directive manner. If a patient chooses pregnancy termination, PPGNHAIK's Patient Navigation team helps them access care in other states. Patient Navigation involves many community partners, and it is managed by discrete funding sources not included in this grant budget. PPGNHAIK's electronic medical records/billing system segregates patient navigation from all other health services, and no JHSSF grant dollars will be used to support patient navigation.

## 2024 Jack Hopkins Project Budget

Planned Parenthood		Safety-Net Health Services	
Total Project Cost		\$70,000	
	Totals	Other Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			\$7,500
Other Grants		\$15,320	
Individual Donors		\$47,180	
PPGNHAIK		In-Kind (clinician wages, equipment, health center utilities, etc.)	
<b>TOTAL PROJECT FUNDS</b>	<b>\$70,000</b>	<b>\$62,500</b>	<b>\$7,500</b>
<b>EXPENSES</b>			
Office Equipment		In-Kind (PPGNHAIK already owns an ultrasound, exam tables, etc.)	
Staff Time		In-Kind (PPGNHAIK already employs a clinical team in Bloomington)	
Contraception procedures		\$32,500	\$5,000
HIV/STI services		\$13,000	\$1,000
Cancer screenings		\$7,000	\$750
Gender affirming hormone procedures		\$5,000	\$500
Pregnancy testing and evaluation		\$5,000	\$250
<b>TOTAL PROJECT EXPENSES</b>	<b>\$70,000</b>	<b>\$62,500</b>	<b>\$7,500</b>

Planned Parenthood of the Great Northwest, Hawaii, Alaska, Indiana, Kentucky  
Statement of Revenues and Expenditures - S Op Stmt - PPGNHAIK vs Budget  
From 12/1/2023 Through 12/31/2023

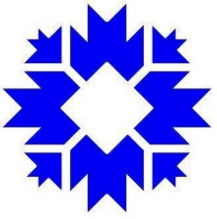
(In Whole Numbers)

	Current Period Budget				YTD Budget - CurrentBudget	YTD Budget Variance - CurrentBudget	Total Budget - CurrentBudget
	Current Month	Current Period Budget - CurrentBudget	Variance - CurrentBudget	Current Year Actual			
<b>SUPPORT AND REVENUE:</b>							
<b>Support</b>							
Contributions	5,448,119.00	6,171,416.00	(723,298.00)	17,029,164.00	17,619,659.00	(590,494.00)	17,619,659.00
Merger Net Asset Contribution	0.00	3,540.00	(3,540.00)	0.00	42,479.00	(42,479.00)	42,479.00
Use of Restricted	<u>53,048.00</u>	<u>1,207,768.00</u>	<u>(1,154,720.00)</u>	<u>2,087,874.00</u>	<u>3,437,629.00</u>	<u>(1,349,756.00)</u>	<u>3,437,629.00</u>
Total Support	5,501,167.00	7,382,724.00	(1,881,557.00)	19,117,038.00	21,099,767.00	(1,982,728.00)	21,099,767.00
<b>Revenue</b>							
Family Planning - Medicaid and Take Ch	491,329.00	711,753.00	(220,424.00)	7,058,536.00	8,546,519.00	(1,487,983.00)	8,546,519.00
Contraceptives - Medicaid and Take Cha	402,066.00	532,793.00	(130,726.00)	5,297,918.00	6,393,511.00	(1,095,593.00)	6,393,511.00
AB & Procedures - Medicaid and Take C	651,655.00	675,937.00	(24,282.00)	8,263,690.00	8,111,244.00	152,446.00	8,111,244.00
Family Planning - Insurance	768,191.00	967,277.00	(199,086.00)	9,505,195.00	11,615,019.00	(2,109,824.00)	11,615,019.00
Contraceptives - Insurance	585,925.00	846,591.00	(260,666.00)	8,544,403.00	10,159,091.00	(1,614,689.00)	10,159,091.00
AB & Procedures - Insurance	484,957.00	547,101.00	(62,144.00)	6,335,015.00	6,565,212.00	(230,197.00)	6,565,212.00
Family Planning - Selfpay	421,756.00	411,917.00	9,839.00	5,463,098.00	4,965,275.00	497,823.00	4,965,275.00
Contraceptives - Selfpay	247,096.00	236,413.00	10,683.00	2,605,749.00	2,836,956.00	(231,207.00)	2,836,956.00
AB & Procedures - Selfpay	315,759.00	390,458.00	(74,699.00)	5,164,840.00	4,685,496.00	479,344.00	4,685,496.00
Contractual Allowance - Medicaid and T	(570,247.00)	(726,246.00)	156,000.00	(5,771,296.00)	(8,714,952.00)	2,943,656.00	(8,714,952.00)
Contractual Allowance - Insurance	(940,259.00)	(890,626.00)	(49,633.00)	(10,145,007.00)	(10,687,606.00)	542,599.00	(10,687,606.00)
Selfpay Revenue Adjustments	(352,385.00)	(197,984.00)	(154,400.00)	(5,753,634.00)	(2,376,476.00)	(3,377,158.00)	(2,376,476.00)
Federal Title X	364,689.00	250,000.00	114,689.00	3,904,636.00	3,000,000.00	904,636.00	3,000,000.00
State Title X	2,192,352.00	4,427,700.00	(2,235,348.00)	8,882,577.00	9,132,404.00	(249,827.00)	9,132,404.00
Federal Education Grants	9,785.00	0.00	9,785.00	110,019.00	0.00	110,019.00	0.00
Investment/Interest	126,255.00	143,880.00	(17,625.00)	1,672,591.00	1,726,564.00	(53,973.00)	1,726,564.00
Other Income	<u>490,305.00</u>	<u>1,473,930.00</u>	<u>(983,625.00)</u>	<u>3,976,587.00</u>	<u>6,637,163.00</u>	<u>(2,660,576.00)</u>	<u>6,637,163.00</u>
Total Revenue	<u>5,689,229.00</u>	<u>9,800,894.00</u>	<u>(4,111,665.00)</u>	<u>55,114,917.00</u>	<u>62,595,420.00</u>	<u>(7,480,503.00)</u>	<u>62,595,420.00</u>
Total SUPPORT AND REVENUE:	<u>11,190,396.00</u>	<u>17,183,618.00</u>	<u>(5,993,222.00)</u>	<u>74,231,955.00</u>	<u>83,695,186.00</u>	<u>(9,463,231.00)</u>	<u>83,695,186.00</u>
<b>EXPENSE:</b>							
<b>Salaries &amp; Professional Fees</b>							
Salary & Fringe	3,680,875.00	4,043,551.00	362,676.00	45,632,264.00	46,737,420.00	1,105,156.00	46,737,420.00
Professional Fees	476,732.00	264,872.00	(211,859.00)	3,020,981.00	3,178,465.00	157,485.00	3,178,465.00
Professional Liability Insurance	65,137.00	45,431.00	(19,706.00)	791,344.00	545,168.00	(246,176.00)	545,168.00
Total Salaries & Professional Fees	4,222,743.00	4,353,853.00	131,110.00	49,444,589.00	50,461,054.00	1,016,465.00	50,461,054.00
<b>Supplies &amp; Equipment</b>							
Cost of Supply Sales	618,554.00	682,795.00	64,240.00	7,230,285.00	7,874,234.00	643,948.00	7,874,234.00
Medical Supplies	62,470.00	119,750.00	57,280.00	983,207.00	1,379,477.00	396,270.00	1,379,477.00
Other Supplies	349,961.00	226,252.00	(123,710.00)	3,207,176.00	2,708,296.00	(498,880.00)	2,708,296.00
Equipment	96,548.00	92,727.00	(3,822.00)	1,150,546.00	1,112,694.00	(37,852.00)	1,112,694.00
Phone	<u>166,069.00</u>	<u>81,848.00</u>	<u>(84,222.00)</u>	<u>2,522,975.00</u>	<u>982,171.00</u>	<u>(1,540,803.00)</u>	<u>982,171.00</u>
Total Supplies & Equipment	1,293,603.00	1,203,370.00	(90,233.00)	15,094,190.00	14,056,872.00	(1,037,318.00)	14,056,872.00
<b>Other Expenses</b>							
Postage & Shipping	49,582.00	38,301.00	(11,281.00)	439,083.00	459,609.00	20,526.00	459,609.00
Advertising & Direct Mail	176,497.00	234,170.00	57,673.00	2,655,094.00	2,810,039.00	154,945.00	2,810,039.00
Printing & Copying	18,605.00	4,581.00	(14,024.00)	76,732.00	54,969.00	(21,763.00)	54,969.00
Travel & Training	40,085.00	86,742.00	46,656.00	835,342.00	1,040,900.00	205,557.00	1,040,900.00
Dues	282,056.00	237,651.00	(44,406.00)	3,137,613.00	3,121,811.00	(15,802.00)	3,121,811.00
Occupancy	554,204.00	367,656.00	(186,548.00)	5,142,010.00	4,411,876.00	(730,134.00)	4,411,876.00
Other Operating Expenses	143,910.00	233,111.00	89,202.00	1,664,070.00	2,803,534.00	1,139,464.00	2,803,534.00
Depreciation	161,488.00	172,175.00	10,687.00	1,976,629.00	2,066,095.00	89,466.00	2,066,095.00
Bad Debt	<u>77,803.00</u>	<u>107,607.00</u>	<u>29,804.00</u>	<u>499,770.00</u>	<u>1,291,289.00</u>	<u>791,519.00</u>	<u>1,291,289.00</u>
Total Other Expenses	<u>1,504,230.00</u>	<u>1,481,993.00</u>	<u>(22,237.00)</u>	<u>16,426,342.00</u>	<u>18,060,121.00</u>	<u>1,633,779.00</u>	<u>18,060,121.00</u>
Total EXPENSE:	<u>7,020,577.00</u>	<u>7,039,217.00</u>	<u>18,640.00</u>	<u>80,965,121.00</u>	<u>82,578,046.00</u>	<u>1,612,925.00</u>	<u>82,578,046.00</u>
EXCESS/(DEFICIT)	<u>4,169,819.00</u>	<u>10,144,401.00</u>	<u>(5,974,582.00)</u>	<u>(6,733,166.00)</u>	<u>1,117,140.00</u>	<u>(7,850,306.00)</u>	<u>1,117,140.00</u>

Planned Parenthood of the Great Northwest, Hawaii, Alaska, Indiana, Kentucky  
Balance Sheet - S Executive Summary - Balance Sheet (E+W)  
As of 12/31/2023

(In Whole Numbers)

	Y-T-D	Prior Year
<b>Assets</b>		
<b>Current Assets</b>		
Cash	7,006,300.00	7,005,617.00
Medicaid and Take Charge Patient Fees Rec	3,154,164.00	3,319,550.00
Other Patient Fees Receivable	599,878.00	1,991,312.00
Other Government Receivables	4,754,778.00	2,429,544.00
Other Receivables	2,654,611.00	3,254,656.00
Pledges Receivable	1,696,346.00	2,151,925.00
Inventory	2,353,228.00	2,781,013.00
Supplies	602,785.00	545,363.00
Prepaid Expenses and Deposits	888,460.00	940,577.00
Total Current Assets	23,710,550.00	24,419,557.00
Long- Term Investments	42,068,494.00	41,709,748.00
<b>Property and Equipment</b>		
Land	12,632,312.00	12,632,312.00
Buildings & Improvements	23,869,940.00	23,869,940.00
Furniture and Equipment	15,058,545.00	14,655,655.00
Leasehold Improvements	9,433,920.00	9,276,978.00
Less Accumulated Depreciation	(24,747,749.00)	(22,771,120.00)
Construction in Process	146,756.00	16,515.00
Total Property and Equipment	36,393,724.00	37,680,280.00
<b>Total Assets</b>	<b><u>102,172,768.00</u></b>	<b><u>103,809,584.00</u></b>
<b>Liabilities and Fund Balance</b>		
<b>Liabilities</b>		
Accounts Payable	2,488,290.00	3,186,085.00
Accrued Payroll and Others	1,786,713.00	165,951.00
Bank Notes Payable	15,866,540.00	16,177,535.00
Estimated Liabilities	1,066,509.00	1,422,160.00
Total Liabilities	21,208,053.00	20,951,730.00
<b>Fund Balances</b>		
Beginning Balances	82,857,854.00	82,857,854.00
Current YTD Net Income	(1,893,139.00)	0.00
Total Fund Balances	80,964,715.00	82,857,854.00
<b>Total Liabilities and Fund Balance</b>	<b><u>102,172,768.00</u></b>	<b><u>103,809,584.00</u></b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Refugee Support Network

**Address:**

P .O. Box 8143 Bloomington IN 47407
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**Phone:** 812-325-4279

**E-Mail:** bloomingtonrefugees@gmail.com

**Website:** Facebook Bloomington Refugee Support Network

**President of Board of Directors:** Board members, Barb Backler, Ann Segraves, Sylvia McNair

**Name of Executive Director:** Pete Lenzen

**Phone:** 812-325-4279

**E-Mail:** plnavy75A@gmail.com

**Name of Grant Writer:** Pete Lenzen

**Phone:** 812-325-4279

**E-Mail:** plnavy75A@gmail.com

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
0	0	14

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The Refugee Support Network (RSN) is an all-volunteer nonprofit (2017). We support asylum seekers, refugees, and others who fled violence and wars in their home countries and are now in Bloomington and Monroe County, working to restart their lives. Following U.S. immigration system procedures, they work in entry level jobs, striving to pay food, rent, utilities, help their children learn English and succeed in school, and work to reacquire the skills and certifications needed to be self-sufficient in America. Due to the U.S. immigration system backlog, many wait over 12 months to get a work permit (social security card), which greatly limits their employment options, and ability to feed and support their families.

Working with our community partners, we work to help our clients meet their immediate needs during this waiting period, providing partial payments for rent, utilities, transportation, medical support, food, and trauma counseling. We help our clients obtain legal counsel during these lengthy legal immigration processes. Most of our clients are self-supporting after a year.

# PROJECT INFORMATION

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Name of the project to be funded:

Newly arriving Asylum Seeker / Refugee Family Transition Support

Total cost of project: \$50,000

Requested amount of Jack Hopkins funding: \$12,000

Number of City residents to be served by this project in 2024: 48 families, 180 residents

Number of clients to be served by this project in 2024: 48 families, 180 residents

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$12,000 to support newly arrived asylum seeker and refugee client families need for partial payments for rent, utilities, transportation, and urgent medical appointments, as they await completion of their immigration processes. Many times their work permit is delayed many months which inhibits their job opportunities, and ability to continually provide essential support to their families. Our clients arrived after fleeing violence in their home countries, and work to restart their lives. They were successful in their previous lives, and are working to raise their children in safety, and regain their employment options. Some families are sharing living arrangements.

Our clients are city residents, most have young children. Older kids are in local schools learning English. The RSN volunteers work with the families, as they search for work, help them find English classes. RSN volunteers helps our clients by driving them to food pantries, medical and school appointments, but also by providing partial payments for rent and utilities, medical bills, etc.

The recent increase in refugee and asylum seeker families resettling in our community has greatly increased the need for our support. 2023 was particularly challenging with client support payments outstripping donations and grants (see year end statement).

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***



# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

We are an all-volunteer group. We do not have an office, we work from our homes and in our client homes.

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes  No

**If “yes,” indicate the nature of the operational request:**

Pilot  Bridge  Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Over the past 6 months (Sept'23-Mar'24), we have received \$17,958 in grants from other community organizations (Community Foundation, The Thrift Shop, Jack Hopkins, others) which enabled us to provide urgently needed relief. We have received \$8,864 in donations from wonderful faith communities and supporters. We continue to rejoice seeing our client families, who fled violence in their home countries, complete their immigration steps, acclimate to our community and achieve financial independence, now giving back to the wider community.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will submit claims for reimbursement per program guidelines, and expect to complete by year end 2024. The Refugee Support Network does not pay clients directly for their financial needs. Rather, we make direct payments to the appropriate agency, landlord, utility, medical office, on the client's behalf.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

If we do not have sufficient funding, we will not be able to support urgent client needs for some newly arrived refugee families.

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Historically, much of RSN support was non-financial. However, this Jack Hopkins funding is essential to our ability to financially support our client families as they continue to restart their lives, improve their language and job skills. In addition to helping pay essential living expenses, RSN works closely with other community organizations, such as HealthNet, St. Vincent de Paul, Middle Way house, El Centro, MCUM, various food pantries and clothing places. Our volunteer "special friends," help clients obtain furniture, find medical treatment for delayed illnesses, drive to doctor appointments and immigration hearings in Chicago, help families address concerns with schools.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Rent assistance	5000
Priority #2	Utility assistance	2000
Priority #3	Medical payment assistance	2000
Priority #4	Transportation	1000
Priority #5	Food assistance	2000
Priority #6		
Priority #7		
<b>Total Requested</b>		

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Our project will enable RSN to financially assist asylum seekers and refugee families, that recently arrived in Bloomington, and Our clients are lower income city residents, who are working entry level, service sector jobs, many with small children, without insurance.

The worsening backlog in immigration system processing now results in a delay of sometimes 12 months for an asylum seeker to gain work authorization, which greatly limits their employment options and ability to support their families. Our legal asylum seeker and refugee client families are from Afghanistan, Syria, Iraq, Sudan, China, Venezuela, Colombia, Honduras, DR Congo, and others.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

This grant will be used as one-time funding to assist our lower income clients in meeting basic needs while they wait for their immigration processes, arrival of their work permits, and as they work to improve their language and job skills. After our support, we have found that our client families are self-supporting, pay taxes and contributing to the community, volunteering in schools.

But other new families are arriving, also fleeing violence in their home countries, and need our support, as they work to restart their lives.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Our clients are eager to create new lives within the Bloomington community and are passionate about not wanting charity. Prior to fleeing their country due to violence, many were professionals, nurses, teachers, supporting their families. Now, restarting their lives, they strongly want to be self-sufficient, earn their own way, pay taxes, and contribute to the community. However, when households are unable to provide for their families due to high cost of housing or utilities or unexpected medical issues, they reluctantly ask for assistance, not wanting to be burdensome to the community. By supporting our clients now, they will be able to continue to build upon their new lives in Bloomington. Some of our previous clients that have adjusted to life in our community, now volunteer to help newly arrived asylum seekers and immigrants assimilate. Our clients have become restaurant owners, engineers, high-tech workers and chefs. This program will continue to strengthen the diverse, welcoming culture that Bloomington is known for.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

- We intend to support 28 client families that falling behind on rent and utility payments.
- We intend to assist 15 client families that are unable to get urgent medical care, lacking established credit and funds for a down payment for a needed medical procedure.
- Through RSN support, we intend to see 48 client families improve their financial stability, physical and emotional health, and confidence, enabling them to progress towards regaining their professional certifications, help their children succeed in school, and further contribute to their surrounding community.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

The (Bloomington) Refugee Support Network (RSN) provides support for immigrants arriving in our community as legal asylum seekers, refugees. Much of our support historically was non-financial, helping our clients learn the "ins and outs" of our community, from medical providers, to schools, jobs, etc. However, many client families see delay in receipt of their work permit, which limits their employment options, compromising their ability to regularly pay rent and utilities. Or they have unexpected medical bills.

As a result, RSN pivoted to focus on these urgent basic living needs. The last couple of years have been very challenging with increased numbers of asylum seeker and refugee families coming to our community. Our traditional support from faith communities and caring individuals is no longer sufficient to meet these greater needs, and we needed to pursue community grants. This Jack Hopkins grant is very important to our organization to help our client families restart their lives.

Families seeking to apply for legal asylum come from many different countries in Africa, Asia and Latin America. These include people fleeing violence in China (ethnic Han political dissidents, as well as persecuted ethnic minorities - Uyghurs), but also Russian, Iran, Afghanistan, Syria, etc, as well as Venezuela, Columbia, etc. Currently, there are more asylum seekers, coming from Asian countries, than from Mexico.

Bloomington has witnessed remarkable success from welcoming families who were born in other countries. Many local physicians, engineers, high-tech factory workers, restaurant owners are first generation immigrants, who have succeeded, and are shining examples of the American dream.

After becoming financially stable, many of our clients "pay it forward" by volunteering at schools and community events. Our previous clients have created positive relationships with, and contribute to, the greater community.

Some of our RSN volunteers find this quote to be inspiring and very relevant.

"Compassion is contagious. Every moment we choose compassion, we move towards a better world."

Amit Ray, *Walking the Path of Compassion*

Thank you for your consideration,




**Refugee  
Support**  
NETWORK

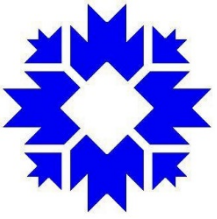
Newly-arriving Asylum Seeker /  
Refugee Family Transition Support-  
2024 PROJECT BUDGET

<b>TOTAL PROJECT COST</b>		<b>\$50,000</b>	
<b>FUNDS</b>		<b>OTHER INCOME</b>	<b>JHSS GRANT</b>
JHSS GRANT			12,000
OTHER GRANTS		22,000	
DONATIONS		16,000	
<b>TOTAL PROJECT FUNDS</b>		<b>38,000</b>	<b>12,000</b>
<b>PROJECT EXPENSES</b>		<b>RSN PROJECT</b>	<b>JHSS GRANT</b>
APPLIC, LEGAL FEES		2,000	0
ATTORNEY SUPPORT		500	0
HOUSEHOLD ITEMS, CLOTHING		7,000	0
COMPUTER		2,000	0
FOOD		7,000	2,000
MEDICAL		6,000	2,000
RENT		13,500	5,000
TRANSP		8,000	1,000
UTILITY		4,000	2,000
<b>TOTAL PROJECT EXPENSES</b>		<b>50,000</b>	<b>12,000</b>

BRSN/pete lenzen\2024 March

YEAR END STATEMENT-		2023	
TOTAL ASSETS year end 2022		IUCU	
		<b>2023 INCOME</b>	
Donations		17,673.39	
Grants		27,617.65	
Income from Sales			
TOTAL CASH INCOME			45,291.04
<i>in-Kind Contributions</i>			
Value of Volunteer hours \$25/hr		61,300.00	
13 regular volunteers			
		<b>2023 EXPENSES</b>	
BANK FEES		0.00	
EVENTS		-3194.40	
OFFICE SUPPLIES		-424.52	
			(3,618.92)
<b>DIRECT SUPPORT TO CLIENTS</b>			
applic fee		-1,846.30	
atty		-350.00	
computer		-1,971.01	
food		-7,126.54	
medical		-5,594.16	
rent		-15,810.24	
Transp		-9,792.45	
utility		-3,886.51	
clothing, household items		-8,558.23	
GRAND TOTAL			(54,935.44)
<b>NET CASH INCOME FOR 2023</b>			(13,263.32)
TOTAL ASSETS year end 2023		IUCU	13,984.56
BLOOMINGTON REFUGEE SUPPORT NETWORK 501C3, DBA- Refugee Support Network;			
pete lenzen 812-325-4279 bloomingtonrefugees@gmail.com; PLNAVY75A@gmail.com; 3/28/2024			





**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** South Central Community Action Program

**Address:**

1500 W 15th Street Bloomington, IN 47404
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**Phone:** (812) 339-3447

**E-Mail:** jyeary@insccap.org

**Website:** insccap.org

**President of Board of Directors:** Tom Pappas

**Name of Executive Director:** Eddy Riou

**Phone:** (812) 339-3447

**E-Mail:** eddy@insccap.org

**Name of Grant Writer:** Jessie Yeary

**Phone:** (812) 339-3447

**E-Mail:** jyeary@insccap.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
92	6	

### **MISSION STATEMENT** (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

We provide opportunities for all people to achieve personal and economic independence to strengthen our community.

# PROJECT INFORMATION

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Name of the project to be funded:

Youth Mental Health for Thriving Connections Families

Total cost of project: \$28,000

Requested amount of Jack Hopkins funding: \$20,000

Number of City residents to be served by this project in 2024: 30

Number of clients to be served by this project in 2024: 30

## PROJECT SYNOPSIS (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are seeking \$25,000 to support our goal of leveraging Thriving Connection's proven track record of combining evidence-based practices with community-driven solutions to provide comprehensive support, as well as access to community relationships in youth services, advocacy, and mental health to build capacity in our Youth Program and better support parents in our Adult Program. The Youth Program currently provides long-term support for 30 children ages 6 months to 18 years old and seeks to provide targeted mental health resources and programming to benefit all of our families, including:

Mental Health Counseling: TC seeks to bring counselors into Thursday Night weekly meetings to offer individual or small group therapeutic activities with youth, build more personal relationships with mental health counselors, connect families to counselors, cover any costs not covered by insurance, and provide whole group mental health educational programming.

Positive Childhood Experiences: A counterweight to Adverse Childhood Experiences. TC will expand opportunities for financial support from traditional extracurricular activities to include any hobbies, interests, activities, and events that participants identify with staff and the Youth Advisory Group as being supportive of their goals to heal and strengthen children's mental health.

Youth Coaching: TC Youth Support Specialist will receive additional professional development opportunities, provide individualized coaching to youth and parents, facilitate seamless access to mental health services, as well as identify targeted whole group activities that support the mental health goals of the community.

Enhancing Partnerships: TC benefits from resources and relationships with Indiana Youth Institute, Youth Services Bureau, Building a Thriving Compassionate Community, and the City of Bloomington Commission on the Status of Children and Youth. Those resources will be leveraged to create ongoing and sustainable networks of support for TC youth.

# COLLABORATIVE PROJECTS

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Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

2421 N Smith Pike, Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

We have an established Youth Extracurricular Fund with help from the Lilly Endowment Grant. We receive community donations to that fund throughout the year. We have a staff position of Youth Support Specialist that manages that fund, and they are supported via SCCAP CSBG funding.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will submit claims for reimbursement in whatever manner you wish, but generally we submit claims on the 15th for expenses incurred during the previous month. We will track our expenses and only claim up to the grant amount awarded during the applicable grant period set forth in the funding agreement.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Thriving Connections has a devoted volunteer base, which includes community volunteers, local faith communities, and IU students through the IU ACES program. In 2023 alone, volunteers donated over 3,000 hours of service in support of Captains and their kids, 500 of which were donated by the Captains themselves in support of each other and the larger community.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Mental Health Individual Counseling	\$3,000
Priority #2	Mental Health Programming, Staffing, and Supplies	\$3,000
Priority #3	Positive Childhood Experience Mini Grants for Families	\$6,500
Priority #4	Youth Coaching, Enhancing Partnerships, and Professional Development	\$7,500
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$20,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

While Thriving Connections supports youth development, our youth are still experiencing the effects of poverty, post-pandemic recovery, and a youth mental health crisis. America's youth mental health crisis is also a crisis in Indiana. The percentage of students who felt sad or hopeless almost every day for two weeks increased from 29 percent in 2016 to 36 percent in 2022. That's over a third of all our high school youth. Today Indiana has the 10th highest rate of children at risk of depression. We are 15th for youth at risk for suicidal ideation. In 2022, 17 percent of our high school students reported seriously considered suicide. Here in Indiana, young girls are twice as likely to report these mental health challenges. The causes and impacts, especially for Thriving Connections Youth, are inseparable from issues that parents are also facing, i.e. financial constraints, time constraints, exposure to violence, and a lack of access to resources.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

During this first year, SCCAP's Director of Communications Jessica Yeary, Director of Programming Laura Buck, TC staff and volunteer-led Advisory Groups will also work to ensure the sustainability of the resources. Ongoing funding is currently being sought through a combination of grants and donations, especially through local partners.



**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Research also showed us that extracurricular activities support child brain development (Zaff, 2003), increase positive health outcomes (Abraczinskas, 2016), and counteract childhood traumas (Khambati, et al 2018). Extracurricular activities help young people identify strengths and build confidence, and when young people excel in non-academic pursuits, their success can lead to excellence in other aspects of school. For at-risk children and youth, extracurricular activities also encourage relationships of mentoring and trust and promote valuable social and life skills and succeed as adults (Cole et al, 2005). Unfortunately, youth living in poverty are less likely to engage in these enriching extracurricular activities or to continue on to college or a technical training program (Mott, 2019). While scholarships were available for certain programs, the funds were limited, only partially covered costs, and could result in the stigmatization of recipients.

Meaningful access to mental health resources can be a life changing experience for youth and a chance for parents to break cycles of generational trauma. With the generous support of the Jack Hopkins Social Services Committee, Thriving Connections can have a deep impact on the future of Bloomington youth.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Success will be measured through participant and parent surveys that document positive outcomes (improved or sustained academic performance, attendance, behavioral plans, improved health, the development of new skills for emotional regulation, widened social and professional networks, sustained participation in Youth Program activities, and bolstered life skills) and through the development of community partnerships.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

South Central Community Action Program – Thriving Connections		Addressing the Youth Mental Health Crisis	
<b>TOTAL PROJECT COST:</b>		28,000	
	Totals	Other Income Sources	JHSS Grant
<b>FUNDS</b>			
JHSS Grant			20,000
Other Grants		2,000	
Other Income Sources		6,000	
Total Project Funds	28,000		
<b>EXPENSES</b>			
Mental Health Individual Counseling		1000	3000
Mental Health Programming, Staffing, and Supplies		3000	3000
Positive Childhood Experience Mini Grants for Families		1000	6500
Youth Coaching, Enhancing Partnerships, and Professional Development		3000	7500
<b>TOTAL PROJECT EXPENSES</b>	28,000	8,000	20,000

South Central Community Action Program Inc  
Balance Sheet As of 12/31/2023

Assets

Current Assets

Cash - Old National	1000	554,871.62
Petty Cash	1004	850.00
W2W bank account	1005	11,952.09
Cash - JP Morgan Chase	1021	494,727.58
Accounts Receivable	1200	130,001.95
Allowance for Doubtful Accounts	1201	(85,000.00)
Grants Receivable	1220	923,711.73
Grants Receivable	1221	278,924.15
Mortgage Receivable 429 Hopewell	1225	19,740.00
Other Recievables	1320	<u>1,385.00</u>

Total Current Assets 2,331,164.12

Long-term Assets

Equipment - Non Fed	1400	56,940.05
Equipment Federal	1410	791,005.06
Accum Deprec. - Non-Fed	1415	(50,297.00)
Accum depr. - Fed Equip	1420	(506,096.60)
Real Estate - Admin Building	1500	1,439,921.50
Land	1505	39,917.74
Storm Sewer	1506	6,500.00
Accum Deprec - Admin Building	1510	(1,405,914.52)
Real Estate - Affordable Rental Houses	1520	680,168.22
Affordable Rental Houses - Accum Depr	1525	(597,026.89)

Total Long-term Assets 455,117.56

Total Assets

2,786,281.68

Liabilities

Short-term Liabilities

Accounts Payable	2000	117,588.48
Escrow Payable - Hopewell	2015	60.00
ARH Deposits	2240	4,142.00
Accrued Salaries	2300	58,271.05
Accrued Vacation	2302	79,476.96
County Tax W/H	2340	(0.03)
Retirement W/H	2350	(19.98)
AFLAC / LTD W/H	2360	(6,904.25)
Universal Life W/H	2365	7,000.67
Garnishment W/H	2370	(60.00)
Clearing	2380	240,879.66
Deferred Revenue	2500	<u>500,000.00</u>

Total Short-term Liabilities 1,000,434.56

Long-term Liabilities

Total Long-term Liabilities 0.00

Total Liabilities

1,000,434.56

Net Assets

Unrestricted Fund Balance	3100	1,608,270.22
Temporarily Restricted Fund Balance	3200	<u>33,101.56</u>
Total Beginning Net Assets		1,641,371.78
Current YTD Net Income		<u>144,475.34</u>
Total Net Assets		<u>1,785,847.12</u>

Total Liabilities and Net Assets

2,786,281.68

South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	CAP AGENCY	Block Grant 2023	Client Intake & Assistance Program	Thriving Connections 2023	Circles Contingency Fund (CMF)	Growing Opportunities	Affordable Housing 2023
<b>Revenue</b>							
Grant Revenue	16,796.84	432,791.51	85,295.73	158,925.36	0.00	48,548.53	74,002.37
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	60,272.00
Donations	1,159.43	0.00	0.00	5,500.00	11,498.20	0.00	0.00
Program Income	0.00	0.00	0.00	0.00	1,250.00	0.00	7,380.00
Investment Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc Revenue - Non-Federal	4,663.38	0.00	0.00	0.00	0.00	0.00	70,308.46
Revenue-Inkind-HS	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Revenue</b>	<b>22,619.65</b>	<b>432,791.51</b>	<b>85,295.73</b>	<b>164,425.36</b>	<b>12,748.20</b>	<b>48,548.53</b>	<b>211,962.83</b>
<b>Expense</b>							
Payroll Processing	0.00	621.94	1,308.02	621.94	0.00	0.00	310.82
Salary	0.00	67,347.49	55,719.78	132,744.40	0.00	50,976.14	80,962.60
Unemployment Compensation	0.00	66.03	62.87	157.00	0.00	73.22	77.23
FICA	0.00	4,799.29	3,788.55	9,454.83	0.00	3,330.40	5,749.62
Employee Fringe - 403b	0.00	515.00	1,025.00	2,015.00	0.00	0.00	257.50
Employee Ins	0.00	3,315.81	17,016.76	24,770.72	0.00	(890.02)	5,746.91
Mileage	64.80	87.03	235.80	575.54	0.00	2,684.82	114.96
Equipment < \$5000	0.00	0.00	18.70	0.00	0.00	0.00	6.80
Depreciation	54,258.94	2,384.19	0.00	441.52	0.00	0.00	15,215.74
Equipment over 5,000	(12,852.75)	0.00	0.00	0.00	0.00	0.00	0.00
Liability Insurance	0.00	430.60	1,964.63	544.84	0.00	0.00	12,524.51
Workers Compensation	0.00	487.06	974.12	487.06	0.00	0.00	243.53
Policy Council	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Inkind Support	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Advertising	0.00	4.56	48.13	352.40	0.00	0.00	12.10
Rent	0.00	0.00	2,429.00	9,000.00	0.00	0.00	160.00
Utilities	0.00	0.00	4,696.74	4,708.64	801.11	4,156.07	5,674.83
Supplies	0.00	262.92	3,308.02	9,177.60	11,420.02	2,364.25	2,245.25
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	0.00	0.00	172.91	0.00	0.00	0.00	20,812.69
Vehicles Expense	16.50	26.00	241.31	0.00	0.00	0.00	87.73
Postage	0.00	132.19	1,826.27	105.68	0.00	0.00	289.64
Telephone	0.00	923.96	2,273.80	1,740.62	0.00	580.17	481.21
Subscriptions & Memberships	241.94	4,789.90	2,018.21	394.97	0.00	21.60	627.37
Copy Cost	0.00	1,344.68	4,537.46	1,342.70	0.00	0.00	673.77
Professional Services	0.00	1,621.86	6,216.30	7,317.09	0.00	300.00	74,654.63
I.T. Support	(38.47)	160.18	5,139.74	565.19	0.00	0.00	1,604.77
Training	0.00	466.01	1,294.50	3,256.91	0.00	0.00	202.98
Travel - Out of Town	0.00	301.20	1,018.90	301.20	0.00	0.00	150.49
Food Service	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Employee Incentives	592.94	0.00	0.00	0.00	0.00	0.00	0.00
Program Assistance	0.00	366,771.99	0.00	0.00	0.00	0.00	56,284.75
Miscellaneous Expense	5,538.05	0.00	0.00	0.00	3.66	0.00	0.00
<b>Total Expense</b>	<b>47,821.95</b>	<b>456,859.89</b>	<b>117,335.52</b>	<b>210,075.85</b>	<b>12,224.79</b>	<b>63,596.65</b>	<b>285,172.43</b>
<b>Excess of Revenues over Expense</b>	<b>(25,202.30)</b>	<b>(24,068.38)</b>	<b>(32,039.79)</b>	<b>(45,650.49)</b>	<b>523.41</b>	<b>(15,048.12)</b>	<b>(73,209.60)</b>



South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	Emerg. Rental Assistance 2 - Housing Stability	Section 8 HCV & PBV 2023	CKF	SFCR	EAP 2022-2023	EAP Supplemental 2022-2023	Energy Assistance Water Program
<b>Revenue</b>							
Grant Revenue	59,374.00	3,478,511.00	68,357.84	126,139.60	284,466.32	314,444.05	19,923.44
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Donations	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Income	0.00	1,380.00	0.00	0.00	0.00	0.00	0.00
Investment Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc Revenue - Non-Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue-Inkind-HS	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Revenue</b>	<u>59,374.00</u>	<u>3,479,891.00</u>	<u>68,357.84</u>	<u>126,139.60</u>	<u>284,466.32</u>	<u>314,444.05</u>	<u>19,923.44</u>
<b>Expense</b>							
Payroll Processing	0.00	1,439.64	0.00	0.00	692.92	418.92	0.00
Salary	0.00	171,249.67	56,303.60	25,266.24	128,351.36	143,850.96	16,242.16
Unemployment Compensation	0.00	182.80	122.58	93.98	255.18	12.79	133.91
FICA	0.00	12,746.13	4,207.23	1,923.57	9,285.16	10,428.97	1,172.34
Employee Fringe - 403b	0.00	2,510.00	0.00	0.00	4,113.00	0.00	0.00
Employee Ins	0.00	22,651.21	2,809.22	533.57	33,827.52	12,151.51	1,894.29
Mileage	539.76	4,838.35	1,806.12	0.00	456.44	32.15	0.00
Equipment < \$5000	0.00	10.20	0.00	0.00	10.20	0.00	0.00
Depreciation	0.00	2,428.36	0.00	0.00	3,090.57	883.02	0.00
Equipment over 5,000	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Liability Insurance	0.00	4,628.16	0.00	0.00	2,959.06	1,040.00	480.74
Workers Compensation	0.00	1,167.88	0.00	0.00	829.40	0.00	0.00
Policy Council	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Inkind Support	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Advertising	0.00	758.44	0.00	153.10	3,515.49	1,308.00	0.00
Rent	0.00	2,647.50	0.00	0.00	2,146.50	238.50	0.00
Utilities	0.00	4,016.39	0.00	0.00	3,283.14	375.67	0.00
Supplies	89.17	4,328.06	1,934.05	9,217.70	5,355.32	2,570.46	50.22
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	0.00	95.44	0.00	0.00	81.93	1.14	0.00
Vehicles Expense	0.00	214.98	67.25	0.00	114.80	35.08	0.00
Postage	0.00	2,202.28	0.00	0.00	9,368.97	294.67	0.00
Telephone	0.00	1,829.67	0.00	0.00	348.36	93.71	0.00
Subscriptions & Memberships	0.00	2,584.61	0.00	264.12	1,735.47	394.51	0.00
Copy Cost	0.00	5,490.62	0.00	0.00	5,406.78	791.22	0.00
Professional Services	0.00	9,194.71	964.51	37,347.56	4,288.25	3,510.30	0.00
I.T. Support	0.00	2,594.66	2,470.84	1,235.42	2,268.63	1,104.48	0.00
Training	0.00	2,425.66	145.00	6,300.00	1,418.25	159.80	0.00
Travel - Out of Town	0.00	2,160.25	426.34	0.00	1,697.19	144.94	0.00
Food Service	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Employee Incentives	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Assistance	10,606.50	3,246,342.00	0.00	600.00	58,566.43	134,603.25	0.00
Miscellaneous Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Expense</b>	<u>11,235.43</u>	<u>3,510,737.67</u>	<u>71,256.74</u>	<u>82,935.26</u>	<u>283,466.32</u>	<u>314,444.05</u>	<u>19,973.66</u>
<b>Excess of Revenues over Expense</b>	<u>48,138.57</u>	<u>(30,846.67)</u>	<u>(2,898.90)</u>	<u>43,204.34</u>	<u>1,000.00</u>	<u>0.00</u>	<u>(50.22)</u>

South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	LIHEAP 2021- 2022 Carryover	LIHEAP 2022- 2023	Duke Healthy Homes 2022	DOE 2022- 2023	BIL24 - Extra DOE Funding	WX Rebate Funds	DOE 2023- 2024
<b>Revenue</b>							
Grant Revenue	112,022.96	284,527.66	28,095.00	79,618.77	228,917.22	97,221.02	111,018.62
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Donations	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Investment Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc Revenue - Non-Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue-Inkind-HS	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Revenue</b>	<u>112,022.96</u>	<u>284,527.66</u>	<u>28,095.00</u>	<u>79,618.77</u>	<u>228,917.22</u>	<u>97,221.02</u>	<u>111,018.62</u>
<b>Expense</b>							
Payroll Processing	170.55	1,595.84	0.00	0.00	1,036.26	0.00	284.55
Salary	8,367.09	82,688.75	0.00	20,826.39	64,541.22	0.00	22,996.86
Unemployment Compensation	70.68	155.48	0.00	85.89	(82.50)	0.00	0.00
FICA	612.18	6,055.00	0.00	1,532.44	4,726.27	0.00	1,698.55
Employee Fringe - 403b	2,578.00	900.00	0.00	1,450.00	0.00	0.00	0.00
Employee Ins	2,071.39	40,877.05	0.00	1,611.20	8,989.01	0.00	6,316.74
Mileage	0.00	94.37	0.00	0.00	50.85	0.00	0.00
Equipment< \$5000	0.00	17.00	0.00	0.00	11.90	0.00	0.00
Depreciation	353.21	3,178.89	0.00	0.00	3,532.10	0.00	0.00
Equipment over 5,000	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Liability Insurance	111.80	5,722.46	0.00	379.48	2,819.84	0.00	1,175.04
Workers Compensation	269.30	1,044.68	0.00	107.72	844.72	0.00	0.00
Policy Council	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Inkind Support	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Advertising	0.00	36.39	0.00	0.00	17.20	0.00	0.00
Rent	40.00	444.00	0.00	28.00	224.00	0.00	0.00
Utilities	50.82	3,106.56	0.00	197.74	1,946.81	0.00	0.00
Supplies	614.71	4,246.55	0.00	35.50	1,373.17	526.04	148.91
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	0.00	152.24	0.00	19.87	77.72	0.00	0.00
Vehicles Expense	159.98	1,562.19	0.00	441.19	1,133.97	49.99	0.00
Postage	1.00	893.20	0.00	11.82	173.26	0.00	0.00
Telephone	0.00	2,026.59	0.00	67.27	1,433.76	0.00	0.00
Subscriptions & Memberships	0.00	3,678.99	0.00	44.62	1,349.53	0.00	0.00
Copy Cost	0.00	2,781.30	0.00	0.00	1,319.11	0.00	0.00
Professional Services	41.51	6,367.56	0.00	392.50	6,520.40	0.00	0.00
I.T. Support	25.74	4,965.91	0.00	225.00	3,605.33	19.99	0.00
Training	0.00	2,828.33	0.00	0.00	1,319.63	350.00	114.97
Travel - Out of Town	141.00	1,679.91	0.00	0.00	692.70	0.00	0.00
Food Service	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Employee Incentives	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Assistance	96,344.00	107,468.42	32,847.22	52,162.14	121,260.96	8,020.83	78,283.00
Miscellaneous Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Expense</b>	<u>112,022.96</u>	<u>284,567.66</u>	<u>32,847.22</u>	<u>79,618.77</u>	<u>228,917.22</u>	<u>8,966.85</u>	<u>111,018.62</u>
<b>Excess of Revenues over Expense</b>	<u>0.00</u>	<u>(40.00)</u>	<u>(4,752.22)</u>	<u>0.00</u>	<u>0.00</u>	<u>88,254.17</u>	<u>0.00</u>

South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	LIHEAP Emerg Supp 2023- 2024	CACFP 2022- 2023	CACFP 2023- 2024	HS 2022-2023	EHS 2022-2023	American Rescue Plan - Head Start	Extended Day
<b>Revenue</b>							
Grant Revenue	52,610.17	199,031.38	65,316.16	2,858,042.45	700,777.72	304,451.71	0.00
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Donations	0.00	0.00	0.00	1,000.00	0.00	0.00	0.00
Program Income	0.00	0.00	0.00	2,500.00	0.00	0.00	0.00
Investment Income	0.00	0.00	0.00	13.74	0.00	0.00	0.00
Misc Revenue - Non-Federal	0.00	0.00	0.00	1,000.00	0.00	0.00	124,946.20
Revenue-Inkind-HS	0.00	0.00	0.00	598,675.77	191,411.42	0.00	0.00
<b>Total Revenue</b>	<u>52,610.17</u>	<u>199,031.38</u>	<u>65,316.16</u>	<u>3,461,231.96</u>	<u>892,189.14</u>	<u>304,451.71</u>	<u>124,946.20</u>
<b>Expense</b>							
Payroll Processing	148.28	0.00	0.00	16,201.40	3,844.37	0.00	0.00
Salary	11,650.51	0.00	0.00	1,678,507.44	502,152.17	81,946.29	28,346.71
Unemployment Compensation	0.00	0.00	0.00	2,665.78	608.16	484.87	6.80
FICA	862.58	0.00	0.00	119,726.80	36,141.90	6,127.33	2,096.42
Employee Fringe - 403b	0.00	0.00	0.00	8,612.00	3,512.01	0.00	0.00
Employee Ins	3,802.46	0.00	0.00	196,345.37	65,036.22	0.00	1,020.23
Mileage	0.00	0.00	0.00	1,464.39	195.00	17.35	0.00
Equipment < \$5000	0.00	0.00	0.00	2,904.40	180.22	16,207.33	0.00
Depreciation	353.21	0.00	0.00	23,002.58	794.70	0.00	0.00
Equipment over 5,000	0.00	0.00	0.00	126,279.25	7,713.50	23,741.00	0.00
Liability Insurance	615.11	0.00	0.00	15,153.74	3,404.74	210.00	0.00
Workers Compensation	145.62	0.00	0.00	15,794.89	3,747.94	0.00	0.00
Policy Council	0.00	0.00	0.00	1,881.94	169.79	0.00	0.00
Inkind Support	0.00	0.00	0.00	598,675.77	191,411.42	0.00	0.00
Advertising	10.96	0.00	0.00	2,468.18	1,362.29	0.00	0.00
Rent	40.00	0.00	0.00	53,576.00	11,288.00	3,600.00	0.00
Utilities	252.22	0.00	0.00	60,153.13	4,660.75	911.75	0.00
Supplies	157.99	82.48	0.00	105,386.83	11,465.12	24,986.33	4,767.87
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	20.62	0.00	0.00	1,303.51	66.69	4,052.95	0.00
Vehicles Expense	138.22	0.00	0.00	10,856.19	50.96	0.00	0.00
Postage	50.25	0.00	0.00	3,190.41	105.89	0.00	0.00
Telephone	105.68	0.00	0.00	8,784.22	693.11	0.00	0.00
Subscriptions & Memberships	262.00	0.00	0.00	47,571.88	6,919.01	350.00	0.00
Copy Cost	229.42	0.00	0.00	24,450.89	1,048.11	47.28	0.00
Professional Services	231.16	0.00	0.00	182,700.30	14,326.00	140,769.23	7,000.00
I.T. Support	795.78	0.00	0.00	19,879.83	4,623.10	0.00	0.00
Training	0.00	0.00	0.00	39,316.61	4,247.01	1,000.00	0.00
Travel - Out of Town	63.10	0.00	0.00	42,350.97	2,987.91	0.00	0.00
Food Service	0.00	198,948.90	65,316.16	51,097.26	9,433.05	0.00	0.00
Employee Incentives	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Assistance	32,675.00	0.00	0.00	0.00	0.00	0.00	57,934.73
Miscellaneous Expense	0.00	0.00	0.00	930.00	0.00	0.00	0.00
<b>Total Expense</b>	<u>52,610.17</u>	<u>199,031.38</u>	<u>65,316.16</u>	<u>3,461,231.96</u>	<u>892,189.14</u>	<u>304,451.71</u>	<u>101,172.76</u>
<b>Excess of Revenues over Expense</b>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>23,773.44</u>



South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

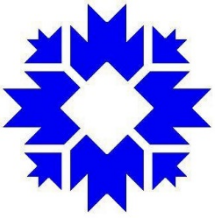
	Early Head Start 2023- 2024	Head Start 2023-2024	Early Years Initiative	TSMA - The Martin Fund	Digital Equity Grant	YXG - Youth Extracurricular Grant	Sophia Travis 2023
<b>Revenue</b>							
Grant Revenue	59,022.12	262,991.94	222,400.00	0.00	0.00	0.00	4,790.00
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Donations	0.00	0.00	0.00	7,500.00	0.00	0.00	0.00
Program Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Investment Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Misc Revenue - Non-Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Revenue-Inkind-HS	<u>14,674.58</u>	<u>43,213.97</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<b>Total Revenue</b>	<u><b>73,696.70</b></u>	<u><b>306,205.91</b></u>	<u><b>222,400.00</b></u>	<u><b>7,500.00</b></u>	<u><b>0.00</b></u>	<u><b>0.00</b></u>	<u><b>4,790.00</b></u>
<b>Expense</b>							
Payroll Processing	1,194.37	5,033.52	0.00	0.00	0.00	0.00	0.00
Salary	40,104.78	148,802.99	0.00	0.00	0.00	0.00	0.00
Unemployment Compensation	15.51	58.77	0.00	0.00	0.00	0.00	0.00
FICA	3,839.86	15,408.00	0.00	0.00	0.00	0.00	0.00
Employee Fringe - 403b	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Employee Ins	6,525.96	22,242.44	0.00	0.00	0.00	0.00	0.00
Mileage	0.00	42.92	0.00	0.00	0.00	0.00	0.00
Equipment< \$5000	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Depreciation	176.60	6,208.16	0.00	0.00	0.00	0.00	0.00
Equipment over 5,000	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Liability Insurance	172.43	1,222.28	0.00	0.00	0.00	0.00	0.00
Workers Compensation	339.64	1,431.34	0.00	0.00	0.00	0.00	0.00
Policy Council	0.00	395.54	0.00	0.00	0.00	0.00	0.00
Inkind Support	14,674.58	43,213.97	0.00	0.00	0.00	0.00	0.00
Advertising	0.00	714.28	0.00	0.00	0.00	0.00	0.00
Rent	1,208.00	5,016.00	0.00	0.00	0.00	0.00	0.00
Utilities	481.91	6,381.90	0.00	0.00	0.00	0.00	0.00
Supplies	443.87	6,886.91	0.00	0.00	3,090.90	1,416.97	0.00
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Vehicles Expense	2.70	72.98	0.00	0.00	0.00	0.00	0.00
Postage	0.00	130.65	0.00	0.00	0.00	0.00	0.00
Telephone	58.72	880.14	0.00	0.00	0.00	0.00	0.00
Subscriptions & Memberships	0.00	95.00	0.00	0.00	0.00	0.00	0.00
Copy Cost	35.38	1,073.17	0.00	0.00	0.00	0.00	0.00
Professional Services	2,088.49	18,173.06	0.00	298.85	0.00	0.00	0.00
I.T. Support	1,125.35	5,136.70	0.00	0.00	0.00	0.00	0.00
Training	0.00	10,016.00	0.00	0.00	0.00	0.00	0.00
Travel - Out of Town	0.00	2,495.34	0.00	0.00	0.00	0.00	0.00
Food Service	1,208.55	5,073.85	0.00	0.00	0.00	0.00	0.00
Employee Incentives	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Program Assistance	0.00	0.00	0.00	21,293.18	0.00	0.00	0.00
Miscellaneous Expense	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<b>Total Expense</b>	<u><b>73,696.70</b></u>	<u><b>306,205.91</b></u>	<u><b>0.00</b></u>	<u><b>21,592.03</b></u>	<u><b>3,090.90</b></u>	<u><b>1,416.97</b></u>	<u><b>0.00</b></u>
<b>Excess of Revenues over Expense</b>	<u><b>0.00</b></u>	<u><b>0.00</b></u>	<u><b>222,400.00</b></u>	<u><b>(14,092.03)</b></u>	<u><b>(3,090.90)</b></u>	<u><b>(1,416.97)</b></u>	<u><b>4,790.00</b></u>

South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	The Health Fund	EAP 2023-2024	LIHEAP 2023- 2024	City of Bloomington WX Funds	Vectren Share the Warmth	Wthrzn - Program Funds	GRAND TOTAL
<b>Revenue</b>							
Grant Revenue	0.00	173,194.20	38,335.83	0.00	2,500.00	0.00	11,052,461.52
Rental Revenue	0.00	0.00	0.00	0.00	0.00	0.00	60,272.00
Donations	0.00	0.00	0.00	0.00	0.00	0.00	26,657.63
Program Income	0.00	0.00	0.00	0.00	0.00	2,920.00	15,430.00
Investment Income	0.00	0.00	0.00	0.00	0.00	0.00	13.74
Misc Revenue - Non-Federal	0.00	0.00	0.00	0.00	0.00	0.00	200,918.04
Revenue-Inkind-HS	0.00	0.00	0.00	0.00	0.00	0.00	847,975.74
<b>Total Revenue</b>	<u>0.00</u>	<u>173,194.20</u>	<u>38,335.83</u>	<u>0.00</u>	<u>2,500.00</u>	<u>2,920.00</u>	<u>12,203,728.67</u>
<b>Expense</b>							
Payroll Processing	0.00	195.34	363.58	0.00	0.00	0.00	35,482.26
Salary	0.00	36,994.01	21,049.38	0.00	0.00	0.00	3,677,988.99
Unemployment Compensation	0.00	2.48	0.25	0.00	0.00	0.00	5,309.76
FICA	0.00	2,875.97	1,544.70	0.00	0.00	0.00	270,134.09
Employee Fringe - 403b	0.00	0.00	0.00	0.00	0.00	0.00	27,487.51
Employee Ins	0.00	3,838.17	7,520.06	0.00	0.00	0.00	490,023.80
Mileage	0.00	40.60	0.00	0.00	0.00	0.00	13,341.25
Equipment < \$5000	0.00	0.00	0.00	0.00	0.00	0.00	19,366.75
Depreciation	0.00	883.02	353.21	0.00	0.00	0.00	117,538.02
Equipment over 5,000	0.00	0.00	0.00	0.00	0.00	0.00	144,881.00
Liability Insurance	0.00	1,915.58	1,984.58	0.00	0.00	0.00	59,459.62
Workers Compensation	0.00	338.48	507.66	0.00	0.00	0.00	28,761.04
Policy Council	0.00	0.00	0.00	0.00	0.00	0.00	2,447.27
Inkind Support	0.00	0.00	0.00	0.00	0.00	0.00	847,975.74
Advertising	0.00	0.00	0.00	0.00	0.00	0.00	10,761.52
Rent	0.00	262.50	40.00	0.00	0.00	0.00	92,388.00
Utilities	0.00	357.55	412.05	0.00	0.00	0.00	106,625.78
Supplies	370.00	1,204.83	282.67	0.00	0.00	0.00	219,810.69
Nutrition Experience	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Maintenance and Repairs	0.00	12.37	0.00	0.00	0.00	0.00	26,870.08
Vehicles Expense	0.00	11.10	240.30	0.00	0.00	0.00	15,523.42
Postage	0.00	617.25	50.25	0.00	0.00	0.00	19,443.68
Telephone	0.00	223.52	358.23	0.00	0.00	0.00	22,902.74
Subscriptions & Memberships	0.00	157.20	0.00	0.00	0.00	0.00	73,500.93
Copy Cost	0.00	430.04	487.36	0.00	0.00	0.00	51,489.29
Professional Services	880.00	446.98	1,409.67	0.00	0.00	0.00	527,060.92
I.T. Support	0.00	1,003.95	1,731.88	0.00	0.00	0.00	60,244.00
Training	0.00	0.00	0.00	0.00	0.00	0.00	74,861.66
Travel - Out of Town	0.00	37.86	0.00	0.00	0.00	0.00	56,649.30
Food Service	0.00	0.00	0.00	0.00	0.00	0.00	331,077.77
Employee Incentives	0.00	0.00	0.00	0.00	0.00	0.00	592.94
Program Assistance	0.00	121,345.40	0.00	16,872.00	2,500.00	0.00	4,622,781.80
Miscellaneous Expense	0.00	0.00	0.00	0.00	0.00	0.00	6,471.71
<b>Total Expense</b>	<u>1,250.00</u>	<u>173,194.20</u>	<u>38,335.83</u>	<u>16,872.00</u>	<u>2,500.00</u>	<u>0.00</u>	<u>12,059,253.33</u>
<b>Excess of Revenues over Expense</b>	<u>(1,250.00)</u>	<u>0.00</u>	<u>0.00</u>	<u>(16,872.00)</u>	<u>0.00</u>	<u>2,920.00</u>	<u>144,475.34</u>

South Central Community Action Program Inc  
Statement of Revenues and Expenditures  
From 1/1/2023 Through 12/31/2023

	Current Period Actual (Through 12 Months)	Current Period Budget (Through 12 Months)	Actual vs. Budget % Difference
<b>Revenue</b>			
Grant Revenue	11,052,461.52	8,962,532.25	23.32
Rental Revenue	60,272.00	62,772.00	(3.98)
Donations	26,657.63	27,456.44	(2.91)
Program Income	15,430.00	32,840.00	(53.01)
Investment Income	13.74	7.15	92.17
Misc Revenue - Non-Federal	200,918.04	122,777.83	63.64
Revenue-Inkind-HS	<u>847,975.74</u>	<u>667,641.56</u>	<u>27.01</u>
Total Revenue	<u>12,203,728.67</u>	<u>9,876,027.24</u>	<u>23.57</u>
<b>Expense</b>			
Payroll Processing	35,482.26	28,073.94	26.39
Salary	3,677,988.99	3,094,193.74	18.87
Unemployment Compensation	5,309.76	10,321.71	(48.56)
FICA	270,134.09	205,517.31	31.44
Employee Fringe - 403b	27,487.51	19,865.36	38.37
Employee Ins	490,023.80	400,139.48	22.46
Mileage	13,341.25	12,288.93	8.56
Equipment< \$5000	19,366.75	17,158.47	12.87
Depreciation	117,538.02	106,987.87	9.86
Equipment over 5,000	144,881.00	2,878.80	0.00
Liability Insurance	59,459.62	50,807.63	17.03
Workers Compensation Insurance	28,761.04	19,538.37	47.20
Policy Council	2,447.27	1,497.92	63.38
Inkind Support	847,975.74	670,805.47	26.41
Advertising	10,761.52	19,838.31	(45.75)
Rent	92,388.00	92,415.00	(0.03)
Utilities	106,625.78	88,174.06	20.93
Supplies	219,810.69	291,001.19	(24.46)
Maintenance and Repairs	26,870.08	96,430.74	(72.14)
Vehicles Expense	15,523.42	12,527.85	23.91
Postage	19,443.68	8,384.73	131.89
Telephone	22,902.74	22,125.95	3.51
Subscriptions & Memberships	73,500.93	37,927.73	93.79
Copy Cost	51,489.29	34,087.79	51.05
Professional Services	527,060.92	285,343.73	84.71
I.T. Support	60,244.00	71,024.17	(15.18)
Training	74,861.66	51,775.17	44.59
Travel - Out of Town	56,649.30	28,104.04	101.57
Food Service	331,077.77	314,727.59	5.20
Employee Incentives	592.94	2,333.55	(74.59)
Program Assistance	4,622,781.80	3,706,192.74	24.73
Miscellaneous Expense	<u>6,471.71</u>	2,448.19	164.35
Total Expense	<u>12,059,253.33</u>	<u>9,804,937.53</u>	<u>22.99</u>
Excess of Revenues over Expense	<u>144,475.34</u>	<u>71,089.71</u>	<u>103.23</u>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Special Olympics Indiana Monroe County (SOIMC)

**Address:**

c/o Ashley Kell or Lisa Lazell 922 N. Woodburn Ave Bloomington, IN 47404
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**Phone:** 812-360-5496 or 812-361-4990

**E-Mail:** soimcfundraising@gmail.com

**Website:** \_\_\_\_\_

**President of Board of Directors:** \_\_\_\_\_

**Name of Executive Director:** Carrie Leiberling

**Phone:** 317-328-2000

**E-Mail:** information@soindiana.org

**Name of Grant Writer:** Lisa Lazell

**Phone:** 812-361-4990

**E-Mail:** lisaloo44@yahoo.com



## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
		89

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

In cooperation with others in the community, Special Olympics Indiana Monroe County (SOIMC) offers year-round sports training and athletic competition for children (8 yrs and up) and adults with intellectual, cognitive, and learning disabilities. The SOIMC works to empower athletes to shatter stereotypes and exceed their personal goals both on and off the field. The SOIMC provides opportunities for athletes to develop physical fitness, demonstrate courage, experience joy and share gifts, skills, and friendship with others in our community.

## PROJECT INFORMATION

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Name of the project to be funded:

Upgrade and replacement of sports equipment

Total cost of project: \$1,267.00

Requested amount of Jack Hopkins funding: \$1,267.00

Number of City residents to be served by this project in 2024: 173

Number of clients to be served by this project in 2024: 188

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

SOIMC seeks a one time investment of \$1,267.00 to replace and update our sports equipment.

Most of our equipment is well used and outdated. We have increased of clients (athletes) by 30% in the last year and are in need of additional sports equipment to address this increase.

We need this investment to continue and to grow our mission and to better serve our athletes.

Providing an accessible platform for individual with disabilities within the City is vital for their continous physical and mental stimulation.

The benefits are an increase in potential performance as available equipment is improved and expanded to support the growing teams. Increase in the sense of value and positivity within these individuals regarding their community.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

N/A

**How do your missions, operations and services complement each other?**

N/A

**What is the existing relationship between agencies?**

N/A

**How will communication and coordination change as a result of the project?**

N/A

**Explain any challenges and steps you plan to take to address those challenges.**

N/A

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

Address where the project will be housed (if different than agency address):

Do you own or have site control of the property at which the project is to take place?

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A



# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Claims for reimbursement will be submitted after we have secured and paid for the equipment. It may be ordered and paid for in stages.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

Volunteers:  
All coaching, staffing, support, and County organization is volunteer based.  
  
In kind:  
Use of MCCSC facilities, parks and Classic Lanes.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	(1) Accessible bowling ramp (Champ Ramp)	450.00
Priority #2	(76) Practice Pinnies	629.00
Priority #3	(8) Basketballs	152.00
Priority #4	(3) Track Batons	8.00
Priority #5	(8) Equipment / Laundry Bags	28.00
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$1,267.00</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

SCAN touches on the difficulty these residents face in developing strong social ties, advocating effectively for themselves, maintaining employment, and participating in their communities. Furthermore, as medical services are often increased for disabled residents, these individuals may face poverty at a greater rate than those without disabilities, creating barriers to participating in costly mental and physical health programs.

Both the SCAN and HAND's Consolidated Plan note that providing opportunities for individuals with disabilities to interact within their community and to improve their physical and mental health is a priority for social service funding in our community, SOIMC provides physical activity, community interaction, health support, and mental stimulation for individuals with disabilities, leveraging and coordinating with existing facilities such as Stone Belt to provide positive long term interactions and support.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

SOIMC seeks a one-time investment from the JHSSF to purchase equipment and provide for team expansion in order to offer residents with disabilities physically and mentally active programming.

Residents with disabilities are particularly vulnerable to social isolation, sedentary lifestyles, and prolonged health risks associated lack of physical activity and interactions.

This investment will enable SOIMC to enhance the quality of physical and mental activities provided as well as increase the capacity of the athletes served within Bloomington. The need for social interactions and stimulation is particularly critical to help increase employment and community involvement rates for disabled residents.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

As the number of residents with disabilities seeking social interactions and independence increases, support services continue to struggle with funding for programming that provides these residents with the tools necessary to promote independent and interactive lifestyles. Physical activity for disabled residents remains one of the top mechanisms for limiting future physical health problems while supporting self-growth and emotional connections.

Providing an avenue for disabled residents to interact with the community while maintaining and improving overall health is the mission of SOIMC. This grant will enhance the SOIMC's capacity to provide residents the proper tools, parameters and setting to improve personal growth, improve physical health and create lasting connections to the Bloomington community,

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

This funding request is for equipment to last indefinitely as well as team expansion.

This will allow for the sporting teams to have the required equipment to allow athletes to participate at a high level of competition. This will allow for continued growth of our organization.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

The Monroe County Special Olympics is housed under the umbrella of Special Olympics of Indiana, however funding for local programs is based almost exclusively on the County volunteers and local fundraising efforts through private, civic and individual donors.

Athletes are never charged.

As the number of athletes in the local area continues to increase, operational costs to support as many teams as possible remains a priority, with availability of crucial accessible equipment and standard sporting gear remaining secondary to avenues for participation.

## 2024 Proposed Project Budget

2024 Proposed Project Budget			
Total Project Cost		\$1,267.00	
	Totals	Other Income Sources	JHSS Grant
Funds			
JHSS Grant			\$1,267.00
Other Grants			
Other Income Sources			
<b>Total Project Funds</b>			<b>\$1,267.00</b>
Expenses			
Expenses			
Project Equipment			\$1,267.00
<b>Total Project Expenses</b>			<b>\$1,267.00</b>

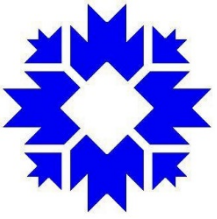
## Special Olympics Indiana Cash Account Activity 2023 Full Year

Date	Trans.	Journal	Reference	Balance
<b>483-10005-000</b>				
<b>Account:</b>	<b>483-10005-000 (Fifth Third Cash Account (A &amp; L's only))</b>			
01/01/2023			<i>Account Beginning Balance</i>	\$16,835.07
01/20/2023	22687-43	Journal Entry	Tfr: Basketball Skills Entry Fees	(\$20.00)
01/23/2023	22454-71	Accounts Payable	Fifth Third Bank-Bank Draft-178	(\$60.00)
02/01/2023	22379-91	Journal Entry	Tfr: Basketball Teams Entry Fees #1	(\$400.00)
02/12/2023	22478-10	Journal Entry	Tfr: ROD Basketball Invite Fees	(\$90.00)
02/13/2023	22568-12	Cash Receipts	Deposit 11039 - Summarized Cash Receipts Receipt	\$147.48
02/25/2023	22600-15	Journal Entry	Tfr: Shelby Co. Basketball Invite Entry Fees	(\$120.00)
03/02/2023	22606-10	Cash Receipts	Deposit 11049 - Summarized Cash Receipts Receipt	\$200.00
03/08/2023	22606-53	Cash Receipts	Deposit 11060 - Summarized Cash Receipts Receipt	\$525.00
03/17/2023	22606-94	Cash Receipts	Deposit 11069 - Summarized Cash Receipts Receipt	\$100.00
03/24/2023	22703-318	Accounts Payable	Fifth Third Bank-Bank Draft-182	(\$240.00)
04/04/2023	22742-2	Cash Receipts	Deposit 11152 - Summarized Cash Receipts Receipt	\$20.00
04/12/2023	22669-62	Accounts Payable	Rexford ChampRamp-Computer Check-21724	(\$375.00)
04/21/2023	22828-371	Accounts Payable	Fifth Third Bank-Bank Draft-183	(\$90.00)
05/11/2023	22810-30	Cash Receipts	Deposit 11201 - Summarized Cash Receipts Receipt	\$408.70
05/24/2023	22789-9	Journal Entry	Tfr: Area 7 Spring Games Entry Fees	(\$348.00)
05/25/2023	22858-126	Cash Receipts	Deposit 11251 - Summarized Cash Receipts Receipt	\$175.00
05/31/2023	22816-95	Journal Entry	Transfer: Summer Games Entry Fees	(\$6,480.00)
05/31/2023	22858-158	Cash Receipts	Deposit 11259 - Summarized Cash Receipts Receipt	\$765.61
06/06/2023	22943-78	Cash Receipts	Deposit 11298 - Summarized Cash Receipts Receipt	\$205.01
06/20/2023	22943-125	Cash Receipts	Deposit 11316 - Summarized Cash Receipts Receipt	\$1,971.16
06/23/2023	22973-354	Accounts Payable	Fifth Third Bank-Bank Draft-185	(\$222.50)
06/30/2023	22983-11	Journal Entry	Tfr:7/19- Area 7 SG T-Shirts	(\$1,010.00)
07/22/2023	23072-8	Journal Entry	Tfr: Morgan Co. Softball Entry Fees	(\$60.00)
07/24/2023	23091-612	Accounts Payable	Fifth Third Bank-Bank Draft-186	(\$442.80)
07/24/2023	23099-9	Cash Receipts	Deposit 11401 - Summarized Cash Receipts Receipt	\$50.00
07/26/2023	23021-106	Accounts Payable	Mark Deckard-Computer Check-22004	(\$845.00)
08/02/2023	23036-6	Journal Entry	Transfer: Polar Plunge Revenue Share	\$2,419.20
08/02/2023	23047-111	Accounts Payable	Denise Brown-Computer Check-22011	(\$237.69)
08/02/2023	23047-123	Accounts Payable	Pacesetter Sports-Computer Check-22013	(\$2,430.00)
08/04/2023	23100-2	Cash Receipts	Deposit 11397 - Summarized Cash Receipts Receipt	\$2,430.00
08/05/2023	23073-17	Journal Entry	Tfr: Shelby Co. Softball Invite Fees	(\$100.00)
08/08/2023	23099-18	Cash Receipts	Deposit 11403 - Summarized Cash Receipts Receipt	\$510.92
08/23/2023	23111-14	Journal Entry	Tfr: Plane Pull County Revenue Share	\$875.00
08/25/2023	23299-11	Cash Receipts	Deposit 11483 - Summarized Cash Receipts Receipt	\$1,380.06
09/04/2023	23299-30	Cash Receipts	Deposit 11486 - Summarized Cash Receipts Receipt	\$36.00
09/05/2023	23299-38	Cash Receipts	Deposit 11489 - Summarized Cash Receipts Receipt	\$148.46
09/05/2023	23328-21	Journal Entry	Tfr: Johnson Co. Softball Center Grove	(\$180.00)
09/30/2023	23260-43	Journal Entry	Tfr 10/11: EKS Entry Fees/FF & SB Skills	(\$270.00)
09/30/2023	23262-38	Journal Entry	Tfr 10/11: EKS Entry Fee/Golf	(\$240.00)
10/04/2023	23217-75	Journal Entry	Tfr: EKS Entry Fee	(\$400.00)
10/11/2023	23457-2	Journal Entry	483 5/3rd Deposit 10/11/2023	\$142.72
10/16/2023	23438-64	Journal Entry	Tfr: State Conference Registration Fees	(\$260.00)
10/17/2023	23326-4	Journal Entry	Tfr 10/25: RE #11121 Chapter Deposit to Monroe	\$106.08
10/23/2023	23380-7	Journal Entry	Tfr 11/1: Area 7- Area Bowling Entry Fees	(\$810.00)
10/25/2023	23331-21	Journal Entry	Tfr: EKS VB Team & Skills Entry Fees	(\$160.00)
11/15/2023	23618-2	Journal Entry	483 5/3rd Deposit 11/15/2023	\$114.05
11/22/2023	23683-566	Accounts Payable	Fifth Third Bank-Bank Draft-189	(\$468.00)
11/29/2023	23586-68	Journal Entry	Tfr: State Bowling Entry Fees	(\$1,020.00)

**Special Olympics Indiana**  
**Cash Account Activity 2023**  
 Full Year

Date	Trans.	Journal	Reference	Balance
<b>Account:</b>	<b>483-10005-000</b>	<b>(Fifth Third Cash Account (A &amp; L's only))</b>		
11/30/2023	23626-2	Journal Entry	483 5/3rd Deposit 11/30/2023	\$20.00
12/20/2023	23682-183	Accounts Payable	Pacesetter Sports-Computer Check-22383	(\$2,475.00)
12/31/2023	23811-3	Journal Entry	Tfr:1/17/24 RE: 11295-Chapter Deposit to Monroe County	\$5,000.00
12/31/2023	23951-3	Journal Entry	483 5/3rd Deposit 12/31/23 for 1/16/24	\$259.68
12/31/2023	24053-2	Journal Entry	483 Split 5/3rd Deposit 12/31/23 for 2/6/24	\$105.00
			<i>Account Subtotals</i>	<u>(\$1,738.86)</u>
12/31/2023			<i>Account Net Change</i>	<u>(\$1,738.86)</u>
12/31/2023			<i>Account Ending Balance</i>	<u>\$15,096.21</u>
01/01/2023			<i>Fund Beginning Balance</i>	\$16,835.07
12/31/2023			<i>Fund Net Change</i>	<u>(\$1,738.86)</u>
12/31/2023			<i>Fund Ending Balance</i>	<u>\$15,096.21</u>





**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** Tandem Community Birth Center and Postpartum House, Inc

**Address:**

2613 E 3rd St Bloomington, IN 47401
---

**Phone:** 812-727-0134

**E-Mail:** admin@tandembloomington.org

**Website:** www.tandembloomington.org

**President of Board of Directors:** Hadassah Katz

**Name of Executive Director:** Julie Duhon

**Phone:** 650-388-0414

**E-Mail:** julie@tandembloomington.org

**Name of Grant Writer:** Julie Duhon

**Phone:** 650-388-0414

**E-Mail:** julie@tandembloomington.org

## AGENCY INFORMATION

---

Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
2	11	200

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

At Tandem, our mission is to improve perinatal outcomes by trusting patients, increasing options for care and challenging the status quo. Our vision is a community where child-bearing families of all kinds have choices in the care they receive and find support and connection during these transformative years.

Too frequently, the practice of medicine is separated and isolated from public health, community building, and social justice work. At Tandem, we strive to weave together these three, creating a hub for healthy reproductive years. At Tandem, we know pregnancy is about more than a uterus. We seek to understand individuals as whole people and their family dynamics. We offer quality perinatal healthcare that is foundationally supported by quality reproductive healthcare and reproductive justice, and we understand that care does not end with birth. Postpartum care and loss support are essential. Diversity, Access, and Inclusion are key components of all Tandem work.

# PROJECT INFORMATION

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Name of the project to be funded:

Operational Scaling

Total cost of project: \$113058

Requested amount of Jack Hopkins funding: \$15,000

Number of City residents to be served by this project in 2024: 500

Number of clients to be served by this project in 2024: 750

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$15,000 to help offset overhead costs such as rent, utilities and administrative salaries. Since Jack Hopkins funded our launch in 2021, Tandem has gone from a dream on a piece of paper with zero staff and just 13 volunteers to a busy non-profit with a physical location, 13 employees and 200 volunteers. Our original JHSS funding gave other funders faith in our capacity to achieve what we set out to do and also enabled us to begin establishing our own, self-sustaining revenue streams. What continues to be the most difficult thing to fund is overhead costs. While our cash flow is good right now, and some aspects of our operations and project work are fully funded through 2026, we still struggle to generate enough revenue to completely cover overhead due to our rapid pace of growth. Our founders worked for 4 years for no pay, but now must earn income to continue the mission. Every month, we are more self-sustaining, but we need help as we continue to scale our operations to meet our community's significant needs.

# COLLABORATIVE PROJECTS

---

Is this a collaborative project?

Yes

No

If yes, list the name(s) of agency partner(s)

How do your missions, operations and services complement each other?

What is the existing relationship between agencies?

How will communication and coordination change as a result of the project?

Explain any challenges and steps you plan to take to address those challenges.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

None required.

# PROJECT COSTS

---

**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative

None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

We cover ops with medical and supportive service fees, and via grants and donations. Monthly overhead (rent, utilities, office supplies and tech, and admin staff) totals \$18,843 of which \$8923 is funded by our EYI grant and \$500 is covered by misc revenue. (see budget worksheet)

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit reimbursement claims monthly as expenses are incurred.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

We have a \$50,000 line of credit to make our overhead budget work, drawing from it as needed, and replacing funds with revenue and donations. JHSS funding will allow us to be less dependent on this line of credit, but the project will not stop regardless, though it may scale back.

**FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

From our first experience with Jack Hopkins, we know that funding begets funding, and being able to state in all future grant applications that we have this overhead assistance to ensure we can continue to pay staff and rent while working on our projects will better situate us for all future funding.

## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	Partial Director and Office Manager salaries	10000
Priority #2	Partial Utility Costs for 6 months	1000
Priority #3	Partial Rent Costs for 6 months	4000
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		15000

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

From our community space, offering a “third space” for families in the community to land, spend time, connect and access resources, to our family transportation pilot, to our “free room” which is directly clothing many children in this community and is frequently used by community partners such as Middleway, IU Health, Nurse Family Partnership, El Centro, and Healthy Families to serve their clients, to our in-home postpartum doula services, Tandem is providing crucial services to families with children in our community. Our medical clinic most frequently serves clients who typically struggle with the existing medical system. A majority of our medical clients can tick off one or more of the following boxes:

- survivor of sexual and/or medical assault
- LGBTQIA+
- multi-lingual or non-English-speaking home
- neurodivergent

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

We are in the middle of a multi-year project to roll out all of our planned operations. By 2027, we expect to have a \$750,000 budget and to be able to sustain operations with generated revenue, seeking funding only to continue to ensure services for all regardless of ability to pay, or to add a new service. These bridge operational funds will allow us to continue to build our eventually self-sustaining revenue streams during this period of rapid growth.



**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

When I think of long-term impact, I think of the single mother with a newborn and three older children who was struggling with her emotional health and had lost her job and was crying every day and had no local support network that could help her. We sent postpartum doulas into her home at no cost 2-3 days a week (funded by 100+ Women who Care). Our doula washed her dishes, folded her laundry, played with the older children, and perhaps, most importantly, LISTENED. The doula helped introduce bottle feeding and helped with pumping as the mother prepared to re-enter the workforce, and held and cared for the baby while the mother showered and rested. They helped to improve the safety of the baby's sleep environment and connected the mother with other resources in the community. They brought her free supplies from our free room and got her to Tandem for parent groups. This impact will last the lifetime of those children.

I also think of the moms who've attended our Mental Health in Pregnancy and Postpartum support group for the last year and have friends who will be with them for a lifetime as they have persevered together through what can be the hardest, most joyous, most isolating and most wonderful time of their life.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

We will track returning and new drop-in visitors to Tandem and postpartum doula in-home client numbers and hours.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Our overhead costs currently enable to provide the following services to all regardless of ability to pay.

1. Drop-In Community Space M-F 9:30-3:30 and by appointment

We had 646 drop-in visitors (not tracked for uniqueness) in 2023. Drop-in's occurred on every day we were open except for 13 days spread out during the year. We've already had 279 drop-in visitors in 2024. In our community space, we have water, tea and coffee, toys and books, comfy places to sit, feed your baby, talk to others. We have doulas ready to answer pregnancy and parenting questions and connect visitors to resources ranging from food and housing support, to substance use and mental health support, to WIC, to lactation support to pelvic floor physical therapy and everything in the middle. Sometimes the most important thing we provide is an adult human to listen to parents who feel isolated at home with very needy tiny human beings all day. We celebrate you getting out of the house and don't care if you've showered or are still in PJs.

2. Free Room - This room is full of resources freely available with as little barrier as possible. We connect families with clothes (pregnancy, nursing, baby, and toddler up to 5T), toys, shoes, bottles, pumps, cribs, mattresses, bouncers, changing tables, strollers and more. We also virtually shop and deliver to client homes when transportation is an issue.

3. Trauma-informed midwifery care from puberty to menopause. We are currently providing paps, birth control, STI testing and treatment, prenatal and postpartum care and more. Our midwife speaks English and Spanish.

4. In-home postpartum doula services (daytime and overnight). We served 13 families in 2023 and 6 to date in 2024. Most families receive several weeks of care (some work with us for months) We have just hired a Spanish-speaking doula.

5. Groups and Classes: Childbirth Ed, Tummy Time, Baby Wearing, Baby Movement, Mental Health In Pregnancy and Postpartum, 2023 Parents group, Partners group, Queer Family Social Hour... these are just a few of our regularly offered programs we provide in our space to the community. Some parents drop in for 1 or 2 groups, others attend every group they can. Some have come every single week for a year.

6. Community Meal Trains.

7. TanGo - Family Transportation Pilot. This pilot is just launching with our new van and enables us to safely transport families and provide doula support and free access to locations such as Wonderlab and Western Skateland.

8. 1:1 Lactation Counseling in home or at Tandem

9. Annual Period Party for teens/tweens and period equity program

10. Perinatal Community Directory and calendar- we maintain a listing of all services providers and events happening for our community's young families

11. Talks on sexual health, parenting in the age of pornography and more.

12. Pregnancy, Postpartum, Loss and Sibling gift bags

Coming Soon: Birth Center and Postpartum House 24x7 care

**Proposed Project Budget June-Dec 2024 (JHSS funding period)**

Tandem Community Birth Center and Postpartum House, Inc		Operational Scaling	
	<b>Totals</b>	<b>Other Income Sources</b>	<b>JHSS Grant</b>
<b>JHSS Grant</b>	\$15000		\$15,000
Early Years Initiative Grant	\$54000	\$54,000	
Service Generated Revenue	\$3000	\$3,000	
Other grants and donations (TBD)	\$41058	\$41,058	
<b>Total Project Funds</b>	<b>\$113058</b>	<b>\$98,058</b>	<b>\$15,000</b>
<b>Expenses</b>			
Executive Director (\$20/hr, 20hrs/week)	\$15000	\$12000	\$3000
Clinical Services Director (\$25/hr, 15hrs/week)	\$15000	\$12000	\$3000
Office Manager (\$20/hr, 40hr/week)	\$26,530	\$22,530	\$4000
Access Collaboration and Equity Director (\$30/hr, 30hrs/week)	\$31040	\$57,570	\$0
Utilities	\$5490	\$4490	\$1000
Rent	\$15000	\$11,000	\$4000
Office Supplies and Tech	\$4998	\$4998	\$0
<b>Total Project Expenses</b>	<b>\$113058</b>	<b>\$98058</b>	<b>\$15000</b>

# Management Report

Tandem

For the period ended December 31, 2023



Prepared on

**March 31, 2024**

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# Profit and Loss

January - December 2023

	<b>Total</b>
<b>REVENUE</b>	
In Kind Donations	453.00
Non-Profit Revenue	6,766.37
Amazon Smile Donation	91.04
Bonfire Donations	7.10
Cash or Check Donation	39,662.42
Educational Course Donation	60.00
Facebook Donations	2,448.15
Grant Revenue	572,034.63
Reimbursable Grant Revenue	10,780.45
<b>Total Grant Revenue</b>	<b>582,815.08</b>
Kroger Community Rewards	377.02
PayPal Donation	1,228.25
PayPal Giving Fund	2.00
PayPal Sales	10.00
Stripe Donation	5,214.19
<b>Total Non-Profit Revenue</b>	<b>638,681.62</b>
Sales	100.00
Clinic Medical Services	300.00
Discounts given	-348.40
Educational Services	6,700.00
Postpartum Doula In-Home Support	24,842.50
Training and Continuing Education Sales	300.00
<b>Total Sales</b>	<b>31,894.10</b>
Sales of Product Income	360.00
Returned Bank Transfer Fee	-4.00
<b>Total Sales of Product Income</b>	<b>356.00</b>
Sales of Product Revenue	245.00
Homemade Products	270.00
I Heart Guts	178.00
Medical Products	108.00
Period Products	275.00
Tandem Merchandise	911.25
<b>Total Sales of Product Revenue</b>	<b>1,987.25</b>
Unapplied Cash Payment Revenue	80.00
<b>Total Revenue</b>	<b>673,451.97</b>
<b>COST OF GOODS SOLD</b>	
Cost of Goods Sold	5,620.53
Gift Bag Supplies	222.01
Shipping Costs	10.00
<b>Total Cost of Goods Sold</b>	<b>5,852.54</b>

	<b>Total</b>
<b>Total Cost of Goods Sold</b>	<b>5,852.54</b>
<b>GROSS PROFIT</b>	<b>667,599.43</b>
<b>EXPENDITURES</b>	
Advertising & Marketing	397.36
Events	370.04
Facebook Ads	51.38
Printing, Publications, Postage and Shipping	693.80
<b>Total Advertising &amp; Marketing</b>	<b>1,512.58</b>
Ask My Accountant	-50.00
Bank Charges & Fees	208.51
Interest Paid	339.16
PayPal Fees	32.81
QuickBooks Payments Fees	995.60
<b>Total Bank Charges &amp; Fees</b>	<b>1,576.08</b>
Contractors	6,990.00
Guest Perinatal Educators	400.00
Legal & Professional Fees	45.00
Medical Director	375.00
<b>Total Contractors</b>	<b>7,810.00</b>
Insurance	
General Liability Insurance	814.88
Medical Malpractice	7,678.70
Worker's Comp	487.32
<b>Total Insurance</b>	<b>8,980.90</b>
Legal & Professional Services	138.00
Professional Memberships	1,114.00
<b>Total Legal &amp; Professional Services</b>	<b>1,252.00</b>
Meals & Entertainment	341.62
Medical Supplies	
Consumables	459.88
Durable Medical Equipment	206.30
<b>Total Medical Supplies</b>	<b>666.18</b>
Office Supplies & Software	365.94
Bathroom Supplies	319.00
Decor	31.98
Fixtures and non-medical Durable equipment	190.54
Office Supplies	1,317.09
Technology	1,146.47
CyberSecurity	506.21
Electronic Health Records	763.29
Payroll Software	2,779.67
Unified Communications	10.71
Website and Email	395.90

	<b>Total</b>
<b>Total Technology</b>	<b>5,602.25</b>
<b>Total Office Supplies &amp; Software</b>	<b>7,826.80</b>
Other Business Expenses	
Client Access and Outreach Costs	980.00
Client Transportation Assistance	10.00
Lab Fees	2,085.97
<b>Total Other Business Expenses</b>	<b>3,075.97</b>
Payroll	
Employee Benefits	640.00
Employee Hourly or Salaried	
Executive Director	1,957.08
Medical Biller Coder	1,535.59
Midwives	19,017.37
Office Manager	35,711.78
Perinatal Educators	13,841.91
Postpartum Doulas	30,036.85
Postpartum Doula Overnight Tier 1	106.55
Postpartum Doula Overnight Tier 2	11,950.46
Postpartum Doulas Overnight Tier 3	1,957.79
<b>Total Postpartum Doulas</b>	<b>44,051.65</b>
Social Workers	8,563.81
<b>Total Employee Hourly or Salaried</b>	<b>124,679.19</b>
Mileage Reimbursements	175.41
Training and Continuing Education for Staff	1,774.00
<b>Total Payroll</b>	<b>127,268.60</b>
Perinatal Education Expenses	
Educational Services Supplies	473.42
Perinatal Education Supplies	125.05
<b>Total Perinatal Education Expenses</b>	<b>598.47</b>
Reimbursable Expenses	605.00
Rent & Lease	27,500.00
Repairs & Maintenance	754.22
Remodeling Floor 1	89,876.05
<b>Total Repairs &amp; Maintenance</b>	<b>90,630.27</b>
Taxes & Licenses	
Sales Tax Paid	-1.38
State Fees	661.43
<b>Total Taxes &amp; Licenses</b>	<b>660.05</b>
Unapplied Cash Bill Payment Expenditure	66.00
Utilities	4,496.89
Fire Alarm System	716.40
Waste Removal	567.00
Water/Sewer	600.50

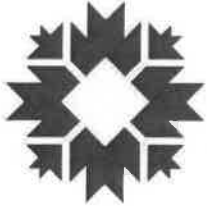


	<b>Total</b>
<b>Total Utilities</b>	<b>6,380.79</b>
<b>Total Expenditures</b>	<b>286,701.31</b>
NET OPERATING REVENUE	<b>380,898.12</b>
OTHER REVENUE	
Interest Earned	1,913.39
<b>Total Other Revenue</b>	<b>1,913.39</b>
NET OTHER REVENUE	<b>1,913.39</b>
NET REVENUE	<b>\$382,811.51</b>

# Balance Sheet

As of December 31, 2023

	<b>Total</b>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
Amazon Credit	-50.24
Checking (0076)	11,438.86
In Kind Clearing	453.00
IUCU CD	75,443.14
IUCU Savings Money Market	360,193.49
PayPal Bank	180.00
Savings (0001)	1,553.34
<b>Total Bank Accounts</b>	<b>449,211.59</b>
<b>Other Current Assets</b>	
Inventory Asset	2,852.42
Undeposited Funds	5,593.54
<b>Total Other Current Assets</b>	<b>8,445.96</b>
<b>Total Current Assets</b>	<b>457,657.55</b>
<b>TOTAL ASSETS</b>	<b>\$457,657.55</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
<b>Credit Cards</b>	
Julie's Capital One Credit Card	3,314.67
Tandem BoA (7552) - 6	7,744.98
<b>Total Credit Cards</b>	<b>11,059.65</b>
<b>Other Current Liabilities</b>	
Other Current Liabilities	1,420.00
<b>Total Other Current Liabilities</b>	<b>1,420.00</b>
<b>Total Current Liabilities</b>	<b>12,479.65</b>
<b>Long-Term Liabilities</b>	
Paula Gordon Loan	10,000.00
<b>Total Long-Term Liabilities</b>	<b>10,000.00</b>
<b>Total Liabilities</b>	<b>22,479.65</b>
<b>Equity</b>	
Opening Balance Equity	2,852.42
Retained Earnings	49,513.97
Net Revenue	382,811.51
<b>Total Equity</b>	<b>435,177.90</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$457,657.55</b>



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

**CONTACT INFORMATION**

---

**Lead Agency Name:** Wheeler Mission--Bloomington

**Address:** 215 S. Westplex Ave.  
Bloomington, IN 47404

**Phone:** 812.333.1905

**E-Mail:** danajones@wheelermission.org

**Website:** <https://www.wheelermission.org/our-work/bloomington>

**President of Board of Directors:** Mike Rasor

**Name of Executive Director:** Perry Hines

**Phone:** 317.635.3575

**E-Mail:** perryhines@wheelermission.org

**Name of Grant Writer:** Chris-Michael G. Morrison

**Phone:** 812.219.2939

**E-Mail:** cmmorrison@wheelermission.org

## AGENCY INFORMATION

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**Is the Lead Agency a 501(c)(3)?**

Yes

No

**Number of Employees:**

Full-Time	Part-Time	Volunteers
10	0	784

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

With a team comprised of only ten individuals, Wheeler Mission—Bloomington welcomes individuals experiencing homelessness as they are onto our Westplex Avenue campus offering critical and timely services without regard to race, color, religion, national origin or citizenship status, sex, gender identity or expression, pregnancy, sexual orientation, age, disability, or military status.

# PROJECT INFORMATION

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Name of the project to be funded:

Outdoor Respite Space for Those Experiencing Homelessness

Total cost of project: \$13,725.11

Requested amount of Jack Hopkins funding: \$13,725.11

Number of City residents to be served by this project in 2024: 963

Number of clients to be served by this project in 2024: 1,133

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Wheeler Mission—Bloomington is asking the City of Bloomington's Common Council to consider our request of \$13,725.11 to purchase outdoor patio furniture for our guests experiencing homelessness to enjoy while staying at our near westside campus.

With three operational facilities located on Westplex Avenue (off of W. 3rd St.), Wheeler Mission—Bloomington is in a position to offer low-barrier services each and every day for those in our care. As Bloomington's largest shelter provider, Wheeler Mission—Bloomington compassionately serves more than 1,000 individuals annually.

One specific, ongoing emergency shelter service provided for our guests (as well as the general public) is interior community day room accessibility. Wheeler Mission—Bloomington's team rotates day room space between our Emergency Shelter Services (55 individual capacity) and Annex (70 individual capacity) facilities to allow for continual organizing/housekeeping responsibilities each week.

But, communal, outdoor space within our Bloomington campus is lacking, especially when Wheeler Mission—Bloomington's community day rooms are filled.

Therefore, Wheeler Mission—Bloomington is seeking funding support to offer outdoor furniture amenities throughout our Westplex Avenue campus for any of our visiting guests; specifically, commercial, metal picnic tables (with umbrellas), benches, and trash receptacles.

# **COLLABORATIVE PROJECTS**

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

**How do your missions, operations and services complement each other?**

**What is the existing relationship between agencies?**

**How will communication and coordination change as a result of the project?**

**Explain any challenges and steps you plan to take to address those challenges.**

*For collaborative projects, please attach a signed Memorandum of Understanding to this application.*

# PROJECT LOCATION

---

**Address where the project will be housed (if different than agency address):**

215 S. Westplex Ave.  
Bloomington, IN 47404

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**

Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

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**Is this request for operational funds?** *(e.g., salaries, rent, vouchers, etc),*

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** *(Indicate source, amount, and whether confirmed or pending):*

Wheeler Mission--Bloomington is not pursuing any additional funding for our Outdoor Respite Space project for our guests experiencing homelessness.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

As a one-time investment and approval from the City of Bloomington, Wheeler Mission--Bloomington will immediately complete a one-time, lump-sum reimbursement claim upon purchasing outdoor furniture amenities for our guests experiencing homelessness.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

## **FISCAL LEVERAGING** *(100 words or less)*

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

With hundreds of community volunteers serving in a variety of capacities throughout our Westplex Avenue campus each year, Wheeler Mission—Bloomington will seek a group of up to twenty volunteers to assemble each of our outdoor furniture sets.

Such an opportunity will allow us to leverage our profile on the Bloomington Volunteer Network to recruit needed volunteers to convene on a predetermined date later this calendar year to set up our outdoor respite space amenities. As an additional service measure for our guests experiencing homelessness, Wheeler Mission—Bloomington will promote our project's successful completion on our Facebook and Instagram pages.



## FUNDING PRIORITIES – RANKED

---

**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Seven 46" Round Metal Picnic Tables	\$7,070
Priority #2	Five Six Foot Benches With Backs	\$2,725
Priority #3	Seven Umbrellas Opening 9 Feet Wide	\$1,260
Priority #4	Four Thermoplastic Receptacles With Bonnet Lids	\$1,996
Priority #5	Shipping of Aforementioned Outdoor Furniture Items	\$674.11
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$13,725.11</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the Service Community Assessment of Needs, the City of Bloomington, Housing and Neighborhood Development Department's 2020-2024 Consolidated Plan, or any other community-wide survey of social service needs.

Wheeler Mission—Bloomington's mission meets essential basic needs of those in our community who are most vulnerable providing emergency shelter, clothing, community and personal safety, food insecurity/hunger relief, and crisis services.

With our ongoing capital improvements within our campus' three facilities, Wheeler Mission—Bloomington desires to give our guests grace, dignity, and respect as individuals within our exterior space, as well. It is not uncommon for our team to observe individuals lying on sidewalk or rights-of-way, as well as congregating on the hill adjacent to our emergency shelter service building.

Therefore, Wheeler Mission—Bloomington's team desires to extend our atmosphere of compassion, kindness, and hope beyond our three facilities' walls and into our outdoor spaces. With the purchase of much needed outdoor furniture within our campus, our guests experiencing homelessness will be able to travel less on foot and ultimately connect to community resources necessary for independence and self-sufficiency with the assistance of our team of case management professionals.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

Wheeler Mission—Bloomington is asking the City of Bloomington's Common Council to make a one-time investment toward the purchase of furniture and accompanying amenities of our campus' outdoor respite space for our guests experiencing homelessness.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Throughout the year, each of Wheeler Mission—Bloomington's three facilities are fully maximized to meet the ongoing demand of services for our guests seeking emergency shelter services. By adding an exterior respite space within our Westplex Avenue campus, our guests, along with Wheeler Mission—Bloomington's team will experience several long-term benefits, such as:

- \* Accessibility of outdoor, communal space for our guests, team, and volunteers to enjoy
- \* Alleviation of spatial constraints of each of Wheeler Mission—Bloomington's community day room spaces so our guests can experience optimal social distancing
- \* Reduced levels of stress and lower blood pressure readings from greater levels of sunshine/vitamin D within a therapeutic environment
- \* Less podiatry concerns among guests due to additional amenities offered within our campus

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

Since Wheeler Mission—Bloomington is proposing to create an outdoor respite space on our Westplex Avenue campus, more than 1,000 visiting individuals will experience:

- \* Additional, communal space throughout the year during times of favorable weather conditions
- \* Accessibility to enjoy the many benefits of spending time outdoors
- \* Safety from a semi-monitored staff presence, along with exterior cameras in the event of emergency

## **OTHER COMMENTS** *(500 words or less)*

---

Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

To put Wheeler Mission—Bloomington's demand for service in perspective, here are our shelter operation services totals from 2023:

- \* Meals Served: 77,624
- \* Nights of Shelter Provided: 37,660 (An average of 103 guests staying at Wheeler Mission per night)
- \* Number of individuals seeking a service at Wheeler Mission: 1,180
- \* First-time guests experiencing homelessness staying at Wheeler Mission: 385
- \* Stable Housing Procurement: 72
- \* Gainful Employment/Income Realized: 192

For a glimpse of the impact Wheeler Mission—Bloomington is making in the lives of those we have the honor of serving, here is a recent success story from a previous guest:

Ryan had been at Wheeler Mission—Bloomington going on six months and since his release from prison, Ryan has worked diligently to get his life together. Having been recently incarcerated, Ryan had to build his way to stability from the ground up.

Immediately, Ryan showed drive and determination as he quickly got a job and began saving money. Although he enjoyed his job, Ryan decided it best to quit when he began classes at Ivy Tech Community College to ensure he could get his footing under him in the classroom.

Pursuing a dual degree in Law and Human Services, Ryan excelled in both courses he signed up for. This led to Ryan deciding that he was up to the task of taking a full course load and working. The next job he would get was as a recovery tech at a nearby rehabilitation facility. This work fell right in line with Ryan's long-term career goals as his passion lies in advocating for those experiencing homelessness and those in recovery in his community. Ryan is now fully immersed in the community as a student and employee.

2024 Wheeler Mission—Bloomington Outdoor Respite Space Budget

<b>Wheeler Mission--Bloomington</b>		<b>Outdoor Respite Space Project</b>	
Total Project Cost		\$13,725.11	
	<b>Totals</b>	<b>Other Income Sources</b>	<b>JHSS Grant</b>
<b>FUNDS</b>			
JHSS Grant			\$13,725.11
Other Income Sources			
<b>TOTAL PROJECT FUNDING</b>	<b>\$13,725.11</b>		<b>\$13,725.11</b>
<b>EXPENSES</b>			
Seven 46" Round Metal Picnic Tables	\$7,070.00		\$7,070.00
Five 6 Foot Benches With Backs	\$2,725.00		\$2,725.00
Four Thermoplastic Receptacles With Bonnet Lids	\$1,996.00		\$1,996.00
Seven Umbrellas Opening 9 Feet Wide	\$1,260.00		\$1,260.00
Shipping of Outdoor Furniture	\$674.11		\$674.11
<b>TOTAL PROJECT EXPENSES</b>	<b>\$13,725.11</b>		<b>\$13,725.11</b>



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 215 S WESTPLEX AVE  
 BLOOMINGTON IN 47404-5082

CUSTOMER NUMBER			SHIP VIA	REQUEST DATE	
2422833			MULTIPLE SHIPMENTS	04/01/24	
QUANTITY	U/M	ITEM NUMBER	DESCRIPTION	UNIT PRICE	EXT. PRICE
4	KT	H-5154BLU	THERMOPLASTIC TRASH CAN - 32 GALLON, BONNET LID, BLUE	499.00	1,996.00
4	EA	H-5154BLU-LD	32GAL BONNET LID - BLUE PART OF KIT	.00	.00
4	EA	H-5155BLU	32GAL THERMOPLASTIC BASE-BLUE PART OF KIT	.00	.00
7	EA	H-8158BLU	UMBRELLA - 9', BLUE	180.00	1,260.00
7	KT	H-10001BLU	METAL PICNIC TABLE - 46" ROUND, BLUE	1,010.00	7,070.00
7	EA	H-10001FRAME	46" ROUND PICNIC TABLE FRAME PART OF KIT	.00	.00
7	EA	H-10001BLUTS	46" ROUND TABLE TOP/SEATS-BLUE PART OF KIT	.00	.00
5	EA	H-2294BLU-P	METAL BENCH WITH BACK - 6', BLUE ITEM IS DROP SHIPPED	545.00	2,725.00

SUB-TOTAL 13,051.00	SALES TAX .00	SHIPPING/HANDLING 674.11	TOTAL 13,725.11
------------------------	------------------	-----------------------------	--------------------

**NOTE:**

ATTENTION: DANA JONES  
 ADDITIONAL SHIPPING TIME IS REQUIRED FOR DROP SHIP ITEMS. PLEASE CONTACT CUSTOMER SERVICE FOR MORE INFORMATION.

*Chris Michael DeMoss*

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Current subtotal: \$12,617.85  
 Gift Card savings: - \$125.00  
 Cost after savings: \$12,492.85

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Subtotal (22 items): \$12,617.85

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|-------------------------------------|--|-----------------|
| <input checked="" type="checkbox"/> |  <p><b>California Umbrella 9' Rd Sunbrella Aluminum Patio Umbrella, Crank Lift, Auto Tilt, Bronze Pole, Pacific Blue</b></p> <p>In Stock<br/>                     FREE delivery Tue, Apr 9 for Prime members<br/>                     FREE Returns<br/>                     Gift options not available. <a href="#">Learn more</a><br/> <input type="checkbox"/> Pay in 3 monthly payments of \$64.33 per item<br/>                     Color: Pacific Blue</p> <p>Qty: 7 <a href="#">Delete</a> <a href="#">Save for later</a> <a href="#">Compare with similar items</a> <a href="#">Share</a></p>                                    | <b>\$192.99</b> |
| <input checked="" type="checkbox"/> |  <p><b>Global Industrial Thermoplastic Coated Mesh Receptacle w/Flat Lid, 36 Gallon, Blue</b></p> <p>In Stock<br/>                     Shipped from: IndustrialSupplies<br/>                     FREE delivery Apr 5 - 8<br/>                     Gift options not available. <a href="#">Learn more</a><br/>                     Color: Blue</p> <p>Qty: 4 <a href="#">Delete</a> <a href="#">Save for later</a> <a href="#">Share</a></p>   | <b>\$492.98</b> |
| <input checked="" type="checkbox"/> |  <p><b>COATEDOUTDOORFURNITURE TRD-LBL Heavy Duty Round Portable Picnic Table, 46", Light Blue, Made in America</b></p> <p>In Stock<br/>                     Shipped from: Coated Outdoor Furniture<br/>                     FREE delivery Apr 8 - 11<br/>                     Gift options not available. <a href="#">Learn more</a><br/>                     Color: Light Blue<br/>                     Size: 46 In, Round, Expanded Steel</p> <p>Qty: 7 <a href="#">Delete</a> <a href="#">Save for later</a> <a href="#">Compare with similar items</a> <a href="#">Share</a></p> | <b>\$989.00</b> |
| <input checked="" type="checkbox"/> |  <p><b>COATEDOUTDOORFURNITURE B6WBP-LBL Heavy Duty Park Bench with Back Portable Frame, 6 Ft, Light Blue, Made in America</b></p> <p>In Stock<br/>                     Shipped from: Coated Outdoor Furniture<br/>                     FREE delivery Apr 8 - 11<br/>                     Gift options not available. <a href="#">Learn more</a><br/>                     Size: 6 Ft, With Back Portable<br/>                     Color: Light Blue</p> <p>Qty: 4 <a href="#">Delete</a> <a href="#">Save for later</a> <a href="#">Compare with similar items</a> <a href="#">Share</a></p>   | <b>\$593.00</b> |

Subtotal (22 items): \$12,617.85

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*Chris-Michael S. Morrison*

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*Chris-Michael S. Morrison*





**WHEELER MISSION MINISTRIES, INC.  
AND SUBSIDIARIES  
CONSOLIDATED FINANCIAL STATEMENTS  
AND  
SUPPLEMENTARY INFORMATION  
MAY 31, 2023 AND 2022**

*CPAs / ADVISORS*



# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

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Blue & Co., LLC / 12800 N. Meridian Street, Suite 400 / Carmel, IN 46032  
main 317.848.8920 fax 317.573.2458 email blue@blueandco.com

## REPORT OF INDEPENDENT AUDITORS

Board of Directors  
Wheeler Mission Ministries, Inc. and Subsidiaries  
Indianapolis, Indiana

### Opinion

We have audited the accompanying consolidated financial statements of Wheeler Mission Ministries, Inc. and Subsidiaries, a nonprofit organization, (hereby collectively referred to as the Ministry), which comprise the consolidated statements of financial position as of May 31, 2023 and 2022, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of the Ministry as of May 31, 2023 and 2022, and changes in their net assets and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Consolidated Financial Statements section of our report. We are required to be independent of the Ministry and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Change in Accounting Principles

As discussed in Note 3 to the consolidated financial statements, on June 1, 2022, the Ministry adopted Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) No. 2016-02, *Leases*. Our opinion is not modified with respect to this matter.

As discussed in Note 12 to the financial statements, on June 1, 2022, the Society adopted FASB ASU No. 2020-07, *Not-for-Profit Entities (Topic 958): Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*. Our opinion is not modified with respect to this matter.

### Responsibilities of Management for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the

**REPORT OF INDEPENDENT AUDITORS**  
**(Continued)**

preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Ministry's ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Consolidated Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is substantial likelihood that, individually or in the aggregate, they would influence the judgement made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgement and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Ministry's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgement, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Ministry's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

**REPORT OF INDEPENDENT AUDITORS**  
**(Continued)**

Supplementary Information

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The consolidated statement of program expenses is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audits of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the consolidated financial statements as a whole.

*Blue & Co., LLC*

Carmel, Indiana  
September 21, 2023

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### CONSOLIDATED STATEMENTS OF FINANCIAL POSITION MAY 31, 2023 AND 2022

<b>ASSETS</b>		
	2023	2022
Cash	\$ 1,041,114	\$ 1,448,628
Restricted cash	207,961	342,315
Investments - capital and general operating	20,153,281	15,699,244
Accounts receivable, net	125,492	693,976
Contributions receivable, net	1,126,367	374,225
Government grants receivable	2,970,595	2,970,595
Note receivable	6,086,700	6,086,700
Inventory	390,017	188,982
Prepaid and other assets	73,457	52,960
Property and equipment, net	29,182,757	28,724,506
Right-of use assets under operating leases, net	1,983,061	-0-
Investments - endowment	14,869,661	14,765,744
Investments - other		
Charitable gift annuities	187,951	196,301
Charitable remainder trust	3,278,206	3,668,696
	<b>\$ 81,676,620</b>	<b>\$ 75,212,872</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>Liabilities</b>		
Accounts payable	\$ 361,595	\$ 454,883
Accrued payroll and other liabilities	557,381	558,726
Operating lease liabilities	2,019,467	-0-
Charitable gift annuities payable	45,655	52,418
Charitable remainder trust payable	2,199,224	2,648,943
Notes payable	8,640,000	8,640,000
Total liabilities	13,823,322	12,354,970
<b>Net assets</b>		
<b>Without donor restrictions</b>		
Undesignated	46,073,708	43,967,363
Board designated - endowment	1,549,321	1,573,872
Board designated - operating reserve	500,000	500,000
	48,123,029	46,041,235
<b>With donor restrictions</b>		
Purpose restricted	4,278,038	2,239,872
Time restricted for future periods	1,380,222	1,384,923
Endowment	14,072,009	13,191,872
	19,730,269	16,816,667
Total net assets	67,853,298	62,857,902
	<b>\$ 81,676,620</b>	<b>\$ 75,212,872</b>

*See accompanying notes to consolidated financial statements.*

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## CONSOLIDATED STATEMENT OF ACTIVITIES

YEAR ENDED MAY 31, 2023

(With Comparative Total for the Year Ended May 31, 2022)

	2023			2022 Total
	Without Donor Restrictions	With Donor Restrictions	Total	
<b>Support and revenue</b>				
Support				
Contributions	\$ 12,464,965	\$ 7,315,114	\$ 19,780,079	\$ 17,166,032
Contributions - wills and estates	682,733	-0-	682,733	420,910
Government grants - employee retention credits	-0-	-0-	-0-	2,970,595
Other fees and grants from government agencies - contributions	26,307	-0-	26,307	1,337,139
Gifts-in-kind	1,444,397	-0-	1,444,397	1,067,854
Revenue				
Program service revenue	2,517,427	-0-	2,517,427	2,708,495
Loss on disposal of property and equipment	(534,420)	-0-	(534,420)	(5,793)
Other	122,216	-0-	122,216	124,865
Change in value of annuity and trust liabilities	212	136,774	136,986	(211,581)
Investment return, net	225,025	(187,810)	37,215	(1,660,255)
Net assets released from restrictions	4,350,476	(4,350,476)	-0-	-0-
	21,299,338	2,913,602	24,212,940	23,918,261
Special events				
Registration fees and other support	1,361,791	-0-	1,361,791	1,511,135
Gift-in-kind support	794,494	-0-	794,494	803,038
Direct expenses of events	(484,340)	-0-	(484,340)	(445,803)
Gift-in-kind expenses	(794,494)	-0-	(794,494)	(803,038)
	877,451	-0-	877,451	1,065,332
Total support and revenue	22,176,789	2,913,602	25,090,391	24,983,593
<b>Expenses</b>				
Program services				
Men's residential center	1,472,680	-0-	1,472,680	1,247,260
Shelter for men	2,744,694	-0-	2,744,694	2,482,545
Center for women and children	3,555,890	-0-	3,555,890	2,849,320
Camp Hunt	1,095,675	-0-	1,095,675	1,068,211
Industry	1,394,150	-0-	1,394,150	1,719,750
Edwards residence	104,813	-0-	104,813	98,205
Thrift shop	1,238,907	-0-	1,238,907	586,884
Ministry services	1,600,900	-0-	1,600,900	1,540,475
Center for men (Bloomington)	977,107	-0-	977,107	807,052
Center for women and children (Bloomington)	191,868	-0-	191,868	154,111
Food services	3,053	-0-	3,053	1,261,951
Restored creations	79,312	-0-	79,312	94,645
	14,459,049	-0-	14,459,049	13,910,409
Supporting activities				
Management and general	1,313,407	-0-	1,313,407	1,114,156
Fundraising and development	4,322,539	-0-	4,322,539	4,005,654
	5,635,946	-0-	5,635,946	5,119,810
Total expenses	20,094,995	-0-	20,094,995	19,030,219
<b>Change in net assets</b>	2,081,794	2,913,602	4,995,396	5,953,374
<b>Net assets, beginning of year</b>	46,041,235	16,816,667	62,857,902	56,904,528
<b>Net assets, end of year</b>	\$ 48,123,029	\$ 19,730,269	\$ 67,853,298	\$ 62,857,902

*See accompanying notes to consolidated financial statements.*

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### CONSOLIDATED STATEMENT OF ACTIVITIES YEAR ENDED MAY 31, 2022

	Without Donor Restrictions	With Donor Restrictions	Total
<b>Support and revenue</b>			
Support			
Contributions	\$ 12,731,738	\$ 4,434,294	\$ 17,166,032
Contributions - wills and estates	420,910	-0-	420,910
Government grants - employee retention credits	2,970,595	-0-	2,970,595
Other fees and grants from government agencies - contributions	1,337,139	-0-	1,337,139
Gifts-in-kind	1,067,854	-0-	1,067,854
Revenue			
Program service revenue	2,708,495	-0-	2,708,495
Loss on disposal of property and equipment	(5,793)	-0-	(5,793)
Other	124,865	-0-	124,865
Change in value of annuity and trust liabilities	5,298	(216,879)	(211,581)
Investment return, net	(355,361)	(1,304,894)	(1,660,255)
Net assets released from restrictions	14,234,264	(14,234,264)	-0-
	35,240,004	(11,321,743)	23,918,261
Special events			
Registration fees and other support	1,511,135	-0-	1,511,135
Gift-in-kind support	803,038	-0-	803,038
Direct expenses of events	(445,803)	-0-	(445,803)
Gift-in-kind expenses	(803,038)	-0-	(803,038)
	1,065,332	-0-	1,065,332
Total support and revenue	36,305,336	(11,321,743)	24,983,593
<b>Expenses</b>			
Program services			
Men's residential center	1,247,260	-0-	1,247,260
Shelter for men	2,482,545	-0-	2,482,545
Center for women and children	2,849,320	-0-	2,849,320
Camp Hunt	1,068,211	-0-	1,068,211
Industry	1,719,750	-0-	1,719,750
Edwards residence	98,205	-0-	98,205
Thrift shop	586,884	-0-	586,884
Ministry services	1,540,475	-0-	1,540,475
Center for men (Bloomington)	807,052	-0-	807,052
Center for women and children (Bloomington)	154,111	-0-	154,111
Food services	1,261,951	-0-	1,261,951
Restored creations	94,645	-0-	94,645
	13,910,409	-0-	13,910,409
Supporting activities			
Management and general	1,114,156	-0-	1,114,156
Fundraising and development	4,005,654	-0-	4,005,654
	5,119,810	-0-	5,119,810
Total expenses	19,030,219	-0-	19,030,219
Change in net assets	17,275,117	(11,321,743)	5,953,374
Net assets, beginning of year	28,766,118	28,138,410	56,904,528
Net assets, end of year	\$ 46,041,235	\$ 16,816,667	\$ 62,857,902

*See accompanying notes to consolidated financial statements.*



## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED MAY 31, 2023

(With Comparative Total for the Year Ended May 31, 2022)

	2023					2022 Total
	Program Services	Supporting Activities			Total	
		Management and General	Fundraising and Development	Total Supporting Activities		
Salaries and benefits	\$ 7,536,385	\$ 387,070	\$ 1,627,736	\$ 2,014,806	\$ 9,551,191	\$ 8,904,180
Gift-in-kind expenses	1,252,579	-0-	794,494	794,494	2,047,073	1,869,841
Public relations and direct mailing	2,863	-0-	1,790,249	1,790,249	1,793,112	1,767,295
Direct expenses of events	-0-	-0-	484,340	484,340	484,340	445,803
Telephone and utilities	782,686	35,183	4,725	39,908	822,594	703,317
Depreciation expense	1,424,457	111,697	-0-	111,697	1,536,154	1,442,704
Postage	1,407	1,046	613,100	614,146	615,553	441,448
Maintenance	452,553	30,312	42,781	73,093	525,646	515,497
Insurance	288,519	741	4,810	5,551	294,070	224,891
Food	234,759	-0-	-0-	-0-	234,759	959,984
Equipment repair and maintenance	275,238	18,454	19,691	38,145	313,383	217,864
Cleaning supplies	116,319	2,204	-0-	2,204	118,523	98,644
Fuel and oil	76,855	2,294	46	2,340	79,195	67,075
Professional services	411,831	502,998	125,688	628,686	1,040,517	779,710
Program materials	165,881	-0-	9,228	9,228	175,109	121,009
Office supplies	18,355	5,420	2,557	7,977	26,332	21,379
Staff travel and conferences	66,783	6,427	14,567	20,994	87,777	56,215
Industry and supplies	990,917	-0-	-0-	-0-	990,917	1,298,770
Grants and scholarships	31,055	24,800	-0-	24,800	55,855	29,575
Interest	-0-	-0-	-0-	-0-	-0-	(333)
Membership fees	17,441	-0-	2,501	2,501	19,942	21,553
Sales and property tax	-0-	2,176	-0-	2,176	2,176	3,339
Capital campaign expenses	-0-	74,676	-0-	74,676	74,676	95,040
Lockbox and bank fees	19,202	104,664	64,850	169,514	188,716	187,313
Facility lease and other costs	233,003	-0-	-0-	-0-	233,003	-0-
Miscellaneous	59,961	3,245	10	3,255	63,216	6,947
Total expenses	<u>14,459,049</u>	<u>1,313,407</u>	<u>5,601,373</u>	<u>6,914,780</u>	<u>21,373,829</u>	<u>20,279,060</u>
Less expenses netted with support and revenues on the statement of activities	<u>-0-</u>	<u>-0-</u>	<u>(1,278,834)</u>	<u>(1,278,834)</u>	<u>(1,278,834)</u>	<u>(1,248,841)</u>
Total expenses reported on the statement of activities	<u>\$ 14,459,049</u>	<u>\$ 1,313,407</u>	<u>\$ 4,322,539</u>	<u>\$ 5,635,946</u>	<u>\$ 20,094,995</u>	<u>\$ 19,030,219</u>

*See accompanying notes to consolidated financial statements.*

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED MAY 31, 2022

	Program Services	Supporting Activities			Total
		Management and General	Fundraising and Development	Total Supporting Activities	
Salaries and benefits	\$ 7,057,706	\$ 291,784	\$ 1,554,690	\$ 1,846,474	\$ 8,904,180
Gift-in-kind expenses	1,066,803	-0-	803,038	803,038	1,869,841
Public relations and direct mailing	3,491	4,780	1,759,024	1,763,804	1,767,295
Direct expenses of events	-0-	-0-	445,803	445,803	445,803
Telephone and utilities	665,410	33,420	4,487	37,907	703,317
Depreciation expense	1,299,977	142,727	-0-	142,727	1,442,704
Postage	1,084	27,470	412,894	440,364	441,448
Maintenance	431,048	33,070	51,379	84,449	515,497
Insurance	217,361	1,536	5,994	7,530	224,891
Food	957,984	-0-	2,000	2,000	959,984
Equipment repair and maintenance	194,903	13,083	9,878	22,961	217,864
Cleaning supplies	97,210	1,434	-0-	1,434	98,644
Fuel and oil	64,250	2,021	804	2,825	67,075
Professional services	313,710	352,052	113,948	466,000	779,710
Program materials	119,359	-0-	1,650	1,650	121,009
Office supplies	17,968	996	2,415	3,411	21,379
Staff travel and conferences	36,586	7,692	11,937	19,629	56,215
Industry and supplies	1,298,770	-0-	-0-	-0-	1,298,770
Grants and scholarships	29,575	-0-	-0-	-0-	29,575
Interest	-0-	(333)	-0-	(333)	(333)
Membership fees	19,376	277	1,900	2,177	21,553
Sales and property tax	-0-	3,339	-0-	3,339	3,339
Capital campaign expenses	-0-	95,040	-0-	95,040	95,040
Lockbox and bank fees	11,097	103,795	72,421	176,216	187,313
Miscellaneous	6,741	(27)	233	206	6,947
Total expenses	13,910,409	1,114,156	5,254,495	6,368,651	20,279,060
Less expenses netted with support and revenues on the statement of activities	-0-	-0-	(1,248,841)	(1,248,841)	(1,248,841)
Total expenses reported on the statement of activities	<u>\$ 13,910,409</u>	<u>\$ 1,114,156</u>	<u>\$ 4,005,654</u>	<u>\$ 5,119,810</u>	<u>\$ 19,030,219</u>

*See accompanying notes to consolidated financial statements.*

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### CONSOLIDATED STATEMENTS OF CASH FLOWS YEARS ENDED MAY 31, 2023 AND 2022

	2023	2022
<b>Operating activities</b>		
Change in net assets	\$ 4,995,396	\$ 5,953,374
Adjustments to reconcile change in net assets to net cash flows from operating activities		
Depreciation	1,536,154	1,442,704
Loss on disposal of property and equipment	534,420	5,793
Realized and unrealized losses on investments, net	1,236,574	2,728,723
Change in value of annuity and trust liabilities	(136,986)	211,581
Change in allowance for doubtful accounts	74,676	95,041
Proceeds from contributions restricted for purchase and renovation of buildings	(91,346)	(1,418,732)
Proceeds from contributions restricted for investment in endowment	(333,334)	-0-
Changes in assets and liabilities		
Accounts receivable	510,641	(333,733)
Contributions receivable	(768,975)	(96,782)
Government grants receivable	-0-	(2,970,595)
Other assets	(221,532)	(2,228)
Right-of-use assets under operating leases, net	(1,983,061)	-0-
Accounts payable	(131,011)	107,820
Accrued payroll and other liabilities	(1,345)	175,280
Operating lease liabilities	2,019,467	-0-
Net cash flows from operating activities	7,239,738	5,898,246
<b>Investing activities</b>		
Capital expenditures	(2,491,102)	(2,932,449)
Purchases of investments	(31,301,363)	(17,241,401)
Proceeds from sale of investments	25,905,675	8,677,779
Net cash flows from investing activities	(7,886,790)	(11,496,071)
<b>Financing activities</b>		
Proceeds from contributions restricted for purchase and renovation of buildings	91,346	1,418,732
Proceeds from contributions restricted for investment in endowment	333,334	-0-
Proceeds from issuance of notes payable	500,000	-0-
Principal payments on notes payable	(500,000)	-0-
Annuities and trusts payments	(319,496)	(311,563)
Net cash flows from financing activities	105,184	1,107,169
Net change in cash	(541,868)	(4,490,656)
<b>Cash and restricted cash, beginning of year</b>	<b>1,790,943</b>	<b>6,281,599</b>
<b>Cash and restricted cash, end of year</b>	<b>\$ 1,249,075</b>	<b>\$ 1,790,943</b>
<b>Included in the consolidated statements of financial position as</b>		
Cash	\$ 1,041,114	\$ 1,448,628
Restricted cash	207,961	342,315
Total cash and restricted cash, end of year	<b>\$ 1,249,075</b>	<b>\$ 1,790,943</b>
<b>Supplemental disclosure of cash flow information</b>		
Change in accounts payable related to capital expenditures	\$ 37,723	\$ (996,384)

*See accompanying notes to consolidated financial statements.*

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

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### 1. NATURE OF ACTIVITIES

The accompanying consolidated financial statements include the accounts of Wheeler Mission Ministries, Inc. and its wholly owned subsidiaries, Wheeler East Street Holdings, Inc., Drumstick Dash, LLC and Wheeler Stores, LLC (collectively referred to as the Ministry). All significant intercompany balances and transactions have been eliminated in consolidation.

Wheeler Mission Ministries, Inc. (WMM), an Indiana not-for-profit corporation, is a non-denominational Christian organization that exists to provide Christ-centered programs and services for individuals experiencing homelessness and those in need. The vision of the Ministry is to see every man, woman, and child we serve be equipped to be productive citizens who enjoy lasting success in Christ.

Services to the community are provided through seven separate facilities, each offering unique programs to the homeless and those in need in Indiana. These facilities include Men's Residential Center, Shelter for Men, Center for Women and Children, and Edwards Residence in the greater Indianapolis, Indiana area, as well as the Training Center at Camp Hunt, the Center for Men, and Center for Women and Children in Bloomington, Indiana.

WMM offers a long-term residential treatment program for addiction recovery that is offered to men at the Training Center at Camp Hunt and to women at the Center for Women and Children.

In addition to the seven service centers, WMM owns and operates a thrift shop in Fishers, Indiana and a pallet manufacturing shop at the Training Center on the Camp Hunt campus in Bloomington. The Wheeler Mission Thrift Store sells used clothing and household items, along with providing no-cost items to individuals and families in need and employment opportunities and training to program participants. Wheeler Pallet and Industry manufactures pallets and provides employment opportunities and training to program participants. Through Restored Creations, women being served by WMM produce candles and develop transferable job skills needed to obtain and maintain employment.

WMM is a member of the Citygate Network, the Evangelical Council for Financial Accountability, and the National Society of Fund Raising Executives.

WMM receives the majority of its support from individuals, churches, businesses, civic organizations, and foundations within the Indianapolis metropolitan area.

Wheeler East Street Holdings, Inc. (ESH), an Indiana public benefit corporation, serves as a holding company for two properties that WMM utilizes to operate various programs. ESH received its initial start-up funding from WMM. WMM also provides ongoing operational support to ESH.

Drumstick Dash, LLC (DD) is a single member limited liability company. DD was formed to house the activities of the annual Drumstick Dash event.

Wheeler Stores, LLC (WS) is a single member limited liability company. WS was formed to house activities of the Wheeler Mission Thrift Store.

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

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### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### Basis of Presentation

The consolidated financial statements report net assets and changes in net assets in classes that are based upon the existence or absence of donor-imposed restrictions, as follows:

Net assets without donor restrictions – Net assets without donor restrictions are resources available to support operations. The only limits on the use of net assets without donor restrictions are the broad limits resulting from the nature of the Ministry, the environment in which it operates, the purposes specified in its corporate documents and its application for tax-exempt status, and any limits resulting from contractual agreements with creditors and others that are entered into in the course of its operations.

Net assets with donor restrictions – Net assets with donor restrictions are resources that are restricted by a donor for use for a particular purpose or in a particular future period. The Ministry's unspent contributions are classified in this class if the donor limited their use. Earnings on donor restricted endowment funds are classified as net assets with donor restrictions until those amounts are appropriated for expenditure. Additionally, some net assets are subject to donor-imposed restrictions that neither expire by passage of time nor can be fulfilled or otherwise removed by actions of the Ministry. Included in this classification are endowment funds, which are subject to the restrictions of gift instruments requiring that the principal be maintained in perpetuity and invested for the purpose of producing present and future income.

When a donor's restriction is satisfied, either by using the resources in the manner specified by the donor or by the passage of time, the expiration of the restriction is reported in the consolidated statement of activities by reclassifying the net assets from net assets with donor restrictions to net assets without donor restrictions. Net assets restricted for acquisition of property and equipment (or the contribution of those assets directly) are reported as net assets with donor restrictions until the donated or acquired assets are placed in service, unless the donor provides more specific directions about the period of its use.

#### Estimates

The preparation of consolidated financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities at the date of the consolidated financial statements, and the reported amounts of support, revenue and expenses during the reporting period. Actual results could differ from those estimates.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

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#### Cash and Restricted Cash

For purposes of the consolidated statement of cash flows, cash excludes cash held by various fund managers which is included in investments.

At May 31, 2023 and 2022, restricted cash consists of ESH funds which are required to be set aside as a reserve related to the net market tax credits (Note 14).

#### Accounts Receivable

Accounts receivable (contract receivables) are recorded at net invoice amounts and consist primarily of billings for the Ministry's enterprise operations at the Training Center on the Camp Hunt campus, which include the production and sales of wood pallets and other wood products. The Ministry's policy for determining when receivables are past due is on a case by case basis. Management estimates an allowance for uncollectible accounts receivable based on an evaluation of current economic conditions, historical trends, and other factors unique to the Ministry's customer base. No late fees or finance charges are assessed. Amounts are considered uncollectible at the time management believes all collection efforts have been exhausted. Management has determined that an allowance for doubtful accounts receivable of \$-0- and \$57,843 was determined necessary at May 31, 2023 and 2022, respectively. At May 31, 2023 and 2022 and June 1, 2021, net accounts receivable have a balance of \$125,492, \$693,976 and \$418,086, respectively.

#### Contributions Receivable

Contributions receivable are unconditional promises to give that are recognized as contributions when the promise is received. Contributions receivable are initially recorded at fair value based on estimated future cash flows of the unconditional pledges and are reported net of an allowance for doubtful amounts. The computation of a present value discount on contributions due in future years has been determined to be insignificant.

Management estimates an allowance for uncollectible contributions receivable based on current economic conditions, historical trends, and current and past experience with their donor base.

#### Government Grants Receivable

Government grants receivable represent amounts awarded by government agencies. Government grants receivable are due within one year and are recorded at their net realizable value. Management estimates an allowance for uncollectible government grants receivable based on current economic conditions, historical trends, and current and past experience with the individual grantors. Management determined that no allowance was necessary as of May 31, 2023 and 2022.

The Coronavirus Aids, Relief, and Economic Security (CARES) Act included a provision for the Employee Retention Credit (ERC). The ERC is a fully refundable tax credit for employers that may be available based on specified declines in gross receipts (revenues) in calendar quarters in 2020 or 2021 compared to the corresponding quarters in 2019. The credit is calculated at

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

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defined percentages of qualified wages that eligible employers pay their employees during the qualifying quarters. The Ministry recognized \$2,970,595 of ERC grant revenue during fiscal 2022, which is included in government grants – employee retention credits in the consolidated statement of activities. Additionally, \$2,970,595 has not yet been received and is included in government grants receivable in the consolidated statements of financial position at May 31, 2023 and 2022.

### Note Receivable

The note receivable represents the outstanding amount due to the Ministry from Chase NMTC Wheeler Mission Investment Fund, LLC which matures March 1, 2051. At May 31, 2023 and 2022, the outstanding balance of this note is \$6,086,700. It is secured by a 99.9% interest in the sub-CDE (see Note 14). The note requires quarterly interest payments through March 10, 2027, then quarterly principal and interest payments of \$74,854 through maturity (interest rate of 1.411%).

The note receivable is reported at its carrying value. The Ministry considers the note to be fully collectible; therefore, no allowance for doubtful accounts has been provided. Interest income related to the note receivable is recorded as an increase in net assets without donor restrictions.

### Inventory

Inventory consists of thrift store goods donated for resale and lumber used to build pallets. Purchased items of inventory are valued at the lower of cost or net realizable value with cost being determined using the first-in, first-out (FIFO) basis. Donated goods received by the Ministry that are to be distributed or sold in the thrift stores are valued as discussed in Note 12.

### Property and Equipment

Property and equipment are capitalized at cost, including expenditures that substantially increase the useful lives of existing assets. Costs of ordinary maintenance and repairs are expensed as incurred.

Gifts for the acquisition of property and equipment are reported as support in net assets with donor restrictions. Absent explicit donor restrictions on use or how long such assets must be maintained, the Ministry reports expirations of donor restrictions when the acquired assets are placed in service. The Ministry reclassifies net assets with donor restrictions to net assets without donor restrictions at that time.

Property and equipment are depreciated using the straight-line method over the estimated useful lives of the assets as follows:

<u>Description</u>	<u>Useful Lives</u>
Buildings and improvements	5 – 40 years
Equipment	3 – 20 years
Vehicles	3 – 10 years

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## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

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#### Impairment of Long-Lived Assets

Property and equipment are reviewed for impairment when a significant change in the asset's use or another indicator of possible impairment is present. If impairment is present, the carrying value of the impaired asset is reduced to its fair value. During the years ended May 31, 2023 and 2022, there was no impairment loss recognized for long-lived assets.

#### Investments and Investment Return

Investments having a readily determinable market value are carried at fair value.

Investment return includes interest, dividends, and realized and unrealized gains and losses. Changes in unrealized appreciation or depreciation of investments are recorded in the period in which such changes occur. Interest and dividend income are recorded when earned. Realized gains and losses are recorded based on the cost of the specific securities sold.

#### Split-Interest Agreements

##### *Charitable Gift Annuities*

The Ministry administers (through a third party administrator) various charitable gift annuities. A charitable gift annuity provides for the payment of distributions to the donor or other designated beneficiaries over a specified term (usually the designated beneficiary's lifetime). At the end of the specified term, the remaining assets are available for the unrestricted use of the Ministry. The portion of the charitable gift annuities attributable to the present value of future benefits to be received by the Ministry is recorded in the consolidated statement of activities as donor restricted contributions in the period the gift is received. There were no such contributions during the years ended May 31, 2023 and 2022. There were no liabilities released for the years ended May 31, 2023 and 2022.

Assets held in trust total \$187,951 and \$196,301 at May 31, 2023 and 2022, respectively, and primarily consist of mutual funds and are reported at their fair value as charitable gift annuity investments in the consolidated statements of financial position. The present value of the estimated future payments to beneficiaries amounts to \$45,655 and \$52,418 at May 31, 2023 and 2022, respectively. The fair value (Level 2 in the fair value hierarchy – see Note 6 for definition) of the estimated future payments to beneficiaries is based on the present value of the future payments and was calculated using a discount rate of 5.0% and the applicable mortality tables.

##### *Charitable Remainder Trust*

The Ministry, serving as the trustee, administers (through a third party administrator) a charitable remainder trust. The trust provides for the payment of distributions to the grantor or other designated beneficiaries over the trust's term (the designated beneficiaries' lifetimes). At the end of the trust's term, the remaining assets are available for the Ministry's use. The portion of the charitable remainder trust attributable to the present value of future benefits to be received by the Ministry is reported in the consolidated statement of activities as donor

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## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

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restricted contributions in the period the contributions are made to the trust. No contributions were made to the trust during the year ended May 31, 2023. Contributions of \$410,556 were made to the charitable remainder trust during the year ended May 31, 2022.

Assets held in trust total \$3,278,206 and \$3,668,696 at May 31, 2023 and 2022, respectively, and primarily consist of mutual funds and are reported at their fair value as charitable remainder trust investments in the consolidated statements of financial position. On an annual basis, the Ministry revalues the liability for distributions to the designated beneficiaries based on actuarial assumptions. The present value of the estimated future payments to beneficiaries amounted to \$2,199,224 and \$2,648,943 at May 31, 2023 and 2022, respectively. The fair value (Level 2 in the fair value hierarchy – see Note 6 for definition) of the estimated future payments is calculated using a discount rate of 5.0% and the applicable mortality tables.

#### Accounting for Contributions and Revenue Recognition

The Ministry recognizes contributions when cash, securities or other assets, an unconditional promise to give, or a notification of a beneficial interest is received. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met.

All contributions are reported as increases in net assets without donor restrictions unless use of the contributed assets is specifically restricted by the donor. Amounts received that are restricted by the donor to use in future periods or for specific purposes are reported as increases in net assets with donor restrictions. Unconditional promises with payments due in future years have an implied restriction to be used in the year the payment is due, and therefore are reported as contributions with donor restrictions until the payment is due unless the contribution is clearly intended to support activities of the current fiscal year.

Program service revenues relate to pallet sales and thrift store sales and are recorded as revenue at the point of sale. Program service revenues also include services provided to individuals in need and are recorded as revenue over time in the year to which they relate (in which performance obligations are fulfilled). All program service revenues represent exchange transactions.

All other revenues are recognized when earned.

#### Functional Allocation of Expenses

The costs of providing the programs and services of the Ministry have been summarized on a functional basis in the consolidated statements of activities and functional expenses. Accordingly, certain costs have been allocated among the various programs and supporting activities benefited based on estimates of time and usage by personnel and programs and the benefits derived. Expenses allocated include salaries and benefits, telephone and utilities, depreciation, maintenance, insurance, professional services and travel. Although the method used was appropriate, other methods could produce different results.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

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Fundraising costs are expensed as incurred, even though they may result in contributions received in future years. The Ministry generally does not conduct its fundraising activities in conjunction with its other activities. In a case in which it does, such costs have been allocated between fundraising and development, program services or management and general expenses in accordance with standards for accounting for costs of activities that include fundraising.

#### Income Taxes

WMM and ESH are exempt from Federal and state income taxes on related income under Section 501(c)(3) of the United States Internal Revenue Code and similar state law.

The activities of DD and WS are exempt as programs under WMM's not-for-profit exemption and are included in the income tax filings of WMM. The exemption is on all income except unrelated business income.

Accounting principles generally accepted in the United States of America require management to evaluate tax positions taken by the Ministry and recognize a tax liability if the Ministry has taken an uncertain position that more likely than not would not be sustained upon examination by various federal and state taxing authorities. Management believes that as of May 31, 2023 and 2022, there are no uncertain positions taken or expected to be taken that would require recognition of a liability or disclosure in the accompanying consolidated financial statements. The Ministry is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress.

As such, the Ministry is generally exempt from income taxes. However, WMM and ESH are required to file Federal Form 990 – Return of Organization Exempt from Income Tax and a corresponding state return, which are informational returns only. WMM and ESH have filed their federal and state income tax returns for periods through May 31, 2022. The activities of DD and WS are included in WMM's tax filings. These income tax returns are generally open to examination by the relevant taxing authorities for a period of three years from the later of the date the return was filed or its due date (including approved extensions).

#### Reclassifications

Certain amounts in the fiscal 2022 consolidated statement of activities have been reclassified herein in order to conform to the presentation in fiscal 2023. These reclassifications had no effect on total support and revenue, total expenses, or the change in net assets for fiscal 2022.

#### Subsequent Events

The Ministry evaluates events or transactions occurring subsequent to the date of the consolidated financial statements in determining the accounting for and disclosure of transactions and events that affect the consolidated financial statements. Subsequent events have been evaluated through September 21, 2023, which is the date the consolidated financial statements were available to be issued.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

MAY 31, 2023 AND 2022

#### 3. CHANGE IN ACCOUNTING PRINCIPLE - LEASES

On June 1, 2022, the Ministry adopted the new lease accounting standard issued by the Financial Accounting Standards Board (FASB) and codified in the Accounting Standards Codification (ASC) as Topic 842 (ASC 842). The lease standard in ASC 842 intended to improve financial reporting about leasing transactions by requiring entities to recognize on the statement of financial position the assets and liabilities for the rights and obligations created by those leases, and to provide additional disclosures regarding the leases. Leases with terms (as defined in ASC 842) of twelve months or less are not required to be reflected on an entity's statement of financial position.

The Ministry applied the modified retrospective approach to all lease agreements when adopting ASC 842. ASC 842 was applied retrospectively to the beginning of the period of adoption through a cumulative-effect adjustment recognized as of June 1, 2022. Prior period amounts have not been adjusted and continue to be reported in accordance with the previous accounting guidance in ASC 840. The adoption of ASC 842 had a material impact on the consolidated statements of financial position but did not have a significant impact on the consolidated statements of activities and the consolidated statements of cash flows. As of June 1, 2022, the Ministry's total assets and total liabilities increased by \$55,073 as a result of ASC 842. The most significant impact was the recognition of right-of-use (ROU) assets under operating leases and operating lease liabilities for operating leases. See Note 9 for the impacts of the adoption of ASC 842 on the consolidated statement of financial position as of June 30, 2023.

The Ministry elected the available practical expedients to account for its existing operating leases under the new guidance, without reassessing (a) whether any expired or existing contracts contain a lease, (b) whether classification of operating leases would be different in accordance with the new guidance, or (c) whether the unamortized initial direct costs, if any, before transition adjustments would have met the definition of initial direct costs in the new guidance at lease commencement. In addition, the Ministry elected the hindsight practical expedient to determine the lease term for existing leases.

#### 4. CONTRIBUTIONS RECEIVABLE

Contributions receivable consist of the following at May 31:

	2023	2022
Due within one year	\$ 699,471	\$ 362,777
Due in one to five years	625,667	77,700
Contributions receivable	1,325,138	440,477
Less allowance for doubtful accounts	(198,771)	(66,252)
Contributions receivable, net	\$ 1,126,367	\$ 374,225

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

#### 5. PROPERTY AND EQUIPMENT

Property and equipment consist of the following at May 31:

	<u>2023</u>	<u>2022</u>
Land	\$ 2,017,552	\$ 2,017,552
Buildings and improvements	35,091,643	34,101,255
Equipment	3,068,252	3,279,487
Vehicles	780,011	729,662
Construction in process	<u>176,705</u>	<u>388,409</u>
	41,134,163	40,516,365
Accumulated depreciation	<u>(11,951,406)</u>	<u>(11,791,859)</u>
	<u>\$ 29,182,757</u>	<u>\$ 28,724,506</u>

Land and buildings aggregating a total cost of \$5,486,241 and \$6,275,721 at May 31, 2023 and 2022, respectively, have been partially funded through grants from the Federal Home Loan Bank of Indianapolis (FHLBI) for the development of affordable housing. The Ministry is subject to various reporting requirements in addition to meeting certain occupancy and low-income housing requirements, as defined in the grants, for a retention period of fifteen years beginning after project completion. If the Ministry does not fulfill the compliance requirements over the fifteen year retention period under the grants, it could be liable to repay a portion of the funding. Management believes the likelihood of not fulfilling its requirements under the FHLBI grants is remote. The retention period of two FHLBI grants aggregating \$500,000 each end during January 2031 and September 2037, respectively.

Construction in process includes costs associated with building construction and improvements not completed as of the end of the fiscal year. At May 31, 2023, the Ministry has contracts in place with various vendors of approximately \$101,000 to complete additional improvements. All of these improvements are anticipated to be completed during fiscal 2024.

#### 6. INVESTMENTS

The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1) and the lowest priority to unobservable inputs (Level 3). The three levels of fair value hierarchy are described as follows:

- Level 1 – Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Ministry has the ability to access.
- Level 2 – Inputs to the valuation methodology include quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in inactive markets; inputs other than quoted prices that are observable for the asset or

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

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liability; inputs that are derived principally from or corroborated by observable market data by correlation or other means. If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

- Level 3 – Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at May 31, 2023 and 2022.

- *Money market mutual funds*: Generally transact subscription and redemption activity at a \$1 stable net asset value (NAV); however, on a daily basis the funds are valued at their daily NAV calculated using the amortized cost of the securities held in the fund.
- *Mutual funds*: Valued at the daily closing price as reported by the fund. Mutual funds held by the Ministry are open-end mutual funds that are registered with the Securities and Exchange Commission. These funds are required to publish their daily net asset value and to transact at that price. The mutual funds held by the Ministry are deemed to be actively traded.
- *Exchange traded funds*: Valued at the closing price reported on the active market on which the individual securities are traded.
- *US government obligations*: Valued using pricing models maximizing the use of observable inputs for similar securities.

The preceding methods described may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Ministry believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in different fair value measurements at the reporting date.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

The following tables set forth the Ministry's investment portfolio as of May 31:

	2023		
	Level 1	Level 2	Total
Money market mutual funds	\$ -0-	\$ 6,861,213	\$ 6,861,213
Mutual funds			
Equity			
Large cap growth	1,327,144	-0-	1,327,144
Large cap value	1,774,331	-0-	1,774,331
Large cap blended	2,628,898	-0-	2,628,898
Midcap	1,075,709	-0-	1,075,709
Small cap	564,247	-0-	564,247
International	1,155,029	-0-	1,155,029
Other	1,237,228	-0-	1,237,228
Fixed income	1,140,567	-0-	1,140,567
Exchange traded funds			
Equity			
Large cap growth	1,034,375	-0-	1,034,375
Large cap value	1,267,134	-0-	1,267,134
Large cap blended	2,120,818	-0-	2,120,818
Midcap	420,202	-0-	420,202
Small cap	423,998	-0-	423,998
International	832,031	-0-	832,031
Other	437,513	-0-	437,513
Fixed income			
Ultrashort bond	853,207	-0-	853,207
Intermediate-core bond	2,868,135	-0-	2,868,135
Other bond	423,613	-0-	423,613
US government obligations			
Treasury notes	-0-	9,965,940	9,965,940
Total fair value	<u>\$ 21,584,179</u>	<u>\$ 16,827,153</u>	38,411,332
Cash			<u>77,767</u>
Total investments			<u>\$ 38,489,099</u>

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

	2022		
	Level 1	Level 2	Total
Money market mutual fund	\$ -0-	\$ 2,525,761	\$ 2,525,761
Mutual funds			
Equity			
Large cap growth	1,625,209	-0-	1,625,209
Large cap value	1,242,144	-0-	1,242,144
Large cap blended	2,139,711	-0-	2,139,711
Midcap	1,427,408	-0-	1,427,408
Small cap	876,018	-0-	876,018
International	1,046,099	-0-	1,046,099
Other	1,205,323	-0-	1,205,323
Fixed income	2,554,876	-0-	2,554,876
Exchange traded funds			
Equity			
Large cap growth	985,351	-0-	985,351
Large cap value	1,436,089	-0-	1,436,089
Large cap blended	2,287,784	-0-	2,287,784
Midcap	424,244	-0-	424,244
Small cap	519,053	-0-	519,053
International	761,582	-0-	761,582
Other	644,371	-0-	644,371
Fixed income			
Ultrashort bond	686,290	-0-	686,290
Intermediate-core bond	2,664,630	-0-	2,664,630
Other bond	445,678	-0-	445,678
US government obligations			
Treasury notes	-0-	5,702,015	5,702,015
Total fair value	<u>\$ 22,971,860</u>	<u>\$ 8,227,776</u>	31,199,636
Cash			<u>3,130,349</u>
Total investments			<u>\$ 34,329,985</u>

The Ministry's investments are exposed to various risks such as interest rate, market, and credit. Due to the level of risk associated with these securities and the level of uncertainty related to changes in the value, it is at least reasonably possible that changes in the various risk factors will occur in the near term that could materially affect the amounts reported in the accompanying consolidated financial statements.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

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Investments are reported on the consolidated statements of financial position as follows at May 31:

	<u>2023</u>	<u>2022</u>
Investments - capital and general operating	\$ 20,153,281	\$ 15,699,244
Investments - endowment	14,869,661	14,765,744
Investments - other		
Charitable gift annuities	187,951	196,301
Charitable remainder trust	<u>3,278,206</u>	<u>3,668,696</u>
	<u>\$ 38,489,099</u>	<u>\$ 34,329,985</u>

The following schedule summarizes investment return for the years ended May 31:

	<u>2023</u>	<u>2022</u>
Interest and dividend income	\$ 1,364,207	\$ 1,165,531
Realized and unrealized losses, net	(1,236,574)	(2,728,723)
Investment service fees	<u>(90,418)</u>	<u>(97,063)</u>
Investment return, net	<u>\$ 37,215</u>	<u>\$ (1,660,255)</u>

#### 7. LINE OF CREDIT AGREEMENT

The Ministry has a \$1,000,000 revolving line of credit facility available with a bank through December 24, 2023. Borrowings under this facility are secured by substantially all assets of the Ministry, and bear interest at the prime rate less 1.25% (7.00% at May 31, 2023). There were no borrowings on this facility as of May 31, 2023 and 2022.



# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

### 8. NOTES PAYABLE

Notes payable consist of the following at May 31:

	<u>2023</u>	<u>2022</u>
Note payable to IR CDE Twelve, LLC (Note 14) with an annual interest rate of 1.00%. Quarterly interest only payments through March 1, 2027, then quarterly principal and interest payments of \$62,863 through maturity on December 1, 2054; secured by a mortgage on the financed ESH property (with a net book value of \$12,528,600 at May 31, 2023) and assignment of contracts and rents; guaranteed by WMM.	\$ 6,086,700	\$ 6,086,700
Note payable to IR CDE Twelve, LLC (Note 14) with an annual interest rate of 1.00%. Quarterly interest only payments through March 1, 2027, then quarterly principal and interest payments of \$26,370 through maturity on December 1, 2054; secured by a mortgage on the financed ESH property (with a net book value of \$12,528,600 at May 31, 2023) and assignment of contracts and rents; guaranteed by WMM.	<u>2,553,300</u>	<u>2,553,300</u>
	<u>\$ 8,640,000</u>	<u>\$ 8,640,000</u>

The above notes payable to IR CDE Twelve, LLC contain certain restrictive covenants, primarily related to ESH, including limitations on the creation of additional indebtedness and liens.

During the year ended May 31, 2023, the Ministry obtained a construction loan for \$500,000 for the acquisition and rehabilitation of an 84-bed emergency men's shelter in Bloomington, Indiana. The loan bore interest at adjusted term SOFR plus 3%, with a maturity date of September 30, 2024. The note was secured by a mortgage on the financed property. In January 2023, the loan was repaid in full through the use of grant proceeds received during the fiscal year.

Future maturities on the notes payable of \$271,550 are due in the year ending May 31, 2028, with all remaining principal due beyond May 31, 2028 (Note 14).

### 9. LEASES

The Ministry recognizes right-of-use (ROU) assets and lease liabilities for leases with terms greater than 12 months or leases that contain a purchase option that is reasonably certain to be exercised. Leases are classified as either finance or operating leases. This clarification dictates whether lease expense is recognized based on an effective interest method or on a straight-line basis over the term of the lease.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

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The Ministry has operating leases for buildings, copiers, vehicles, forklifts, mailing equipment, and a security system. Leasing agreements required fixed payments and also include an amount that is probable will be owed under residual value guarantees, if applicable. Lease payments also include payments related to purchase or termination options when the lease is reasonably certain to exercise the option or is reasonably certain not to exercise the option, respectively. The Ministry's agreements to not contain any material restrictive covenants. The leases have remaining terms of 1 to 11.25 years.

The Ministry's ROU assets and lease liabilities are recognized on the lease commencement date in an amount that represents the present value of future lease payments over the lease term. The Ministry utilizes its collateralized incremental borrowing rate commensurate to the lease term as the discount rate for its leases unless the Ministry can specifically determine the lessor's implicit rate. Certain lease contracts contain non-lease components such as maintenance and utilities. The Ministry has made a policy to not separate the lease and non-lease components, and thus recognize a single lease component for all of its right-of-use assets and lease liabilities. The operating lease ROU asset also includes any lease payments made and excludes lease incentives, if any.

Short-term leases (leases with an initial term of 12 months or less or leases that are cancelable by the lessee or lessor without significant penalties) are not capitalized but are expensed on a straight-line basis over the lease term.

Variable lease costs include variable common area maintenance expenses charged to the Ministry. Such measures are not included in the measurement of the lease liability but will be recognized as variable lease expense when they are incurred.

In evaluating contracts to determine if they qualify as a lease, the Ministry considers factors such as if it has obtained substantially all of the rights to the underlying asset through exclusivity, if the Ministry can direct the use of the asset by making decisions about how and what purpose the asset will be used and if the lessor has substantive substitution rights. Furthermore, the Ministry assesses whether it is reasonably certain to exercise options to terminate a lease considering all relevant factors that create economic incentive to exercise such options, including asset, contract, market, and entity-based factors. These evaluations may require significant judgement.

The components of the Ministry's lease cost for the year ended May 31, 2023 are as follows:

Operating lease cost	\$	209,627
Variable lease cost		62,177
Short-term lease cost		<u>19,653</u>
Total lease cost	\$	<u>291,457</u>

Total rent expense for the year ended May 31, 2022 was \$16,991.

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## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

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The Ministry's right-of-use assets and lease liabilities and other disclosures as of and for the year ended May 31, 2023 are as follows:

Right-of-use assets, net	
Operating lease assets, net	\$ 1,983,061
Lease liabilities	
Operating lease liabilities	\$ 2,019,467
Cash paid for amounts included in the measurement of lease liabilities	
Operating cash flows from operating leases	\$ 173,222
Right-of-use asset obtained in exchange for new operating lease liabilities	\$ 2,054,667
Weighted-average remaining lease term - operating leases	10.7 years
Weighted-average discount rate - operating leases	5.63%

Future payments of lease liabilities at May 31, 2023 are as follows:

December 31, May 31,	
2024	\$ 241,497
2025	221,476
2026	217,323
2027	217,915
2028	212,789
Thereafter	<u>1,670,798</u>
Total lease payments	2,781,798
Less: Interest	<u>(762,331)</u>
Present value of lease liabilities	<u>\$ 2,019,467</u>

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

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Future minimum lease payments under the terms of non-cancelable operating leases in effect at May 31, 2022, under previous accounting guidance under ASC 840, are summarized below:

Year Ending May 31,	
2023	\$ 149,356
2024	179,228
2025	184,206
2026	185,202
2027	190,180
Thereafter	<u>420,189</u>
	<u>\$ 1,308,361</u>

### 10. NET ASSETS

#### Net Assets Without Donor Restrictions – Board Designated

Board designated net assets are net assets without donor restrictions subject to self-imposed limits determined by action of the Board of Directors. The designations are as follows at May 31:

	<u>2023</u>	<u>2022</u>
Funds functioning as endowment:		
General operations	\$ 1,549,321	\$ 1,573,872
Other board designated:		
Operating reserve	<u>500,000</u>	<u>500,000</u>
	<u>\$ 2,049,321</u>	<u>\$ 2,073,872</u>

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

#### Net Assets With Donor Restrictions

Net assets with donor restrictions are restricted for the following purposes or periods at May 31:

	2023	2022
<b>Purpose restricted</b>		
Center for Women and Children	\$ 151,333	\$ 266,735
Capital campaign for expansion of Center for Women and Children	89,505	214,014
Lilly Endowment - capital investments	-0-	301,748
Lilly Endowment - optimization study	-0-	12,184
Lilly Endowment - capacity building support COVID-19	3,077,299	-0-
Outreach addiction recovery	-0-	473,549
Other programs	355,099	282,773
	604,802	688,869
	4,278,038	2,239,872
<b>Time restricted for future periods</b>		
Charitable remainder trusts	1,078,982	1,019,753
Drumstick Dash	218,221	273,556
Other	83,019	91,614
	1,380,222	1,384,923
<b>Endowment</b>		
Contributions receivable - legacy fund	751,669	-0-
<b>Invested endowment</b>		
Future sustainability	10,756,534	10,922,831
Legacy fund	334,325	-0-
Director of food service support	641,729	655,506
Center for Women and Children or Training Center at Camp Hunt	1,277,950	1,298,824
Other	309,802	314,711
Total invested endowment	13,320,340	13,191,872
	14,072,009	13,191,872
	\$ 19,730,269	\$ 16,816,667

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

#### Net Assets Released From Restrictions

Net assets were released from donor-imposed restrictions by incurring expenses satisfying the restricted purpose or by occurrence of other events specified by donors as follows during the years ended May 31:

	2023	2022
Purpose restriction:		
Center for Women and Children	\$ 711,155	\$ 623,185
Capital campaign for expansion of Center for Women and Children	242,280	11,956,509
Provide shelter, food, and medical assistance under various other programs	1,125,690	1,179,360
Lilly Endowment - capital investments	301,748	25,436
Lilly Endowment - technology and security	-0-	9,642
Lilly Endowment - optimization study	12,184	12,816
Lilly Endowment - future sustainability	94,601	-0-
Lilly Endowment - capacity building support	322,701	-0-
COVID-19	473,549	403,251
Programs - projects	702,444	-0-
Time restriction:		
Drumstick Dash	273,573	24,065
Other	90,551	-0-
	\$ 4,350,476	\$ 14,234,264

## 11. ENDOWMENT

The Ministry's endowments consist of donor restricted and board designated funds. As required by accounting principles generally accepted in the United States of America, net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.

#### Interpretation of Relevant Law

Management is subject to the State Prudent Management of Institutional Funds Act (SPMIFA) and thus, classifies amounts in its donor-restricted endowment funds as net assets with donor restrictions because those net assets are time restricted until the Board of Directors appropriates such amounts for expenditure. Those net assets are also subject to purpose restrictions that must be met before reclassifying those net assets to net assets without donor restrictions. The Board of Directors has interpreted SPMIFA as not requiring the preservation of the purchasing power of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, when reviewing its donor-restricted endowment funds, the Ministry considers a fund to be underwater if the fair

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

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value of the fund is less than the sum of (a) the original value of initial and subsequent gift amounts donated to the fund and (b) any accumulations to the fund that are required to be maintained in perpetuity in accordance with the direction of the applicable donor gift instrument.

The Ministry has interpreted SPMIFA to permit spending from underwater funds in accordance with the prudent measure required under the law. Additionally, in accordance with SPMIFA, the Ministry considers the following factors in making a determination to appropriate or accumulate donor-restricted endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of the Ministry and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation of investments
- (6) Other resources of the Ministry
- (7) The investment policies of the Ministry

#### Underwater Endowment Funds

From time to time, due to unfavorable market fluctuations, the fair value of assets associated with the individual donor-restricted endowment funds may fall below the level that the donor requires the Ministry to retain as a fund of perpetual duration. There were no deficiencies of this nature at May 31, 2023 and 2022.

#### Return Objectives and Risk Parameters

The Ministry has adopted investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowments while seeking to maintain the purchasing power of the endowment assets. Under these policies, as approved by the Board of Directors, the endowment investments are invested in a manner that is intended to protect the purchasing power of the original investment and to maximize the total return of the Ministry within reasonable and prudent levels of risk. Actual returns in any given year may vary.

#### Strategies Employed for Achieving Objectives

To satisfy its long-term rate-of-return objectives, the Ministry relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). The Ministry, as it relates to its endowment investments, targets a diversified asset allocation that places an emphasis on a balance between equity and fixed income investments to achieve its long-term return objectives within prudent risk constraints.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

#### Spending Policy and How the Investment Objectives Relate to Spending Policy

The Ministry has a policy of appropriating for distributions each year up to 3% of the net asset value of the endowment as calculated on May 31 of the preceding fiscal year, except for those donor restricted endowment funds held to support future sustainability. Appropriations in excess of 3% of the net asset value of the endowment or appropriations that would cause deterioration of the corpus of the endowment require an affirmative vote of 75% of the entire of Board of Directors then serving. The endowment fund held for future sustainability (Note 10) is limited by the donor, at such times when the balance of the fund is below the historic dollar value of the grant, to spending of 2% of the grant fund balance, and at such times when the grant fund balance is over the historic dollar value of the grant but when planned spending would cause the grant fund balance to fall below the historic dollar value of the grant, to spending of the greater of up to 2% of the grant fund balance or the excess of the grant fund balance over the historic dollar value of the grant. In establishing its policies, the Ministry intends to maintain the purchasing power of the endowment assets held in perpetuity as well as to provide additional real growth through new gifts and investment return.

The composition of the Ministry's endowment is as follows at May 31:

	2023		
	Without Donor Restrictions	With Donor Restrictions	Total
Board designated endowment funds	\$ 1,549,321	\$ -0-	\$ 1,549,321
Donor restricted endowment funds			
Original donor-restricted gift amount and amounts required to be maintained in perpetuity by donor	-0-	10,736,734	10,736,734
Accumulated investment gains	-0-	2,583,606	2,583,606
	\$ 1,549,321	\$ 13,320,340	\$ 14,869,661
	2022		
	Without Donor Restrictions	With Donor Restrictions	Total
Board designated endowment funds	\$ 1,573,872	\$ -0-	\$ 1,573,872
Donor restricted endowment funds			
Original donor-restricted gift amount and amounts required to be maintained in perpetuity by donor	-0-	10,403,400	10,403,400
Accumulated investment gains	-0-	2,788,472	2,788,472
	\$ 1,573,872	\$ 13,191,872	\$ 14,765,744



## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

The change in endowment net assets is as follows for the years ended May 31:

	2023		
	Without Donor Restrictions	With Donor Restrictions	Total
Endowment net assets, beginning of year	\$ 1,573,872	\$ 13,191,872	\$ 14,765,744
Deposits	-0-	333,334	333,334
Distributions	-0-	(94,602)	(94,602)
Investment return, net	(24,551)	(110,264)	(134,815)
Endowment net assets, end of year	\$ 1,549,321	\$ 13,320,340	\$ 14,869,661
	2022		
	Without Donor Restrictions	With Donor Restrictions	Total
Endowment net assets, beginning of year	\$ 1,735,451	\$ 14,305,770	\$ 16,041,221
Investment return, net	(161,579)	(1,113,898)	(1,275,477)
Endowment net assets, end of year	\$ 1,573,872	\$ 13,191,872	\$ 14,765,744

## 12. CONTRIBUTED NONFINANCIAL ASSETS

On June 1, 2022, the Ministry adopted ASU No. 2020-07, *Not-for-Profit Entities (Topic 958): Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*. This new standard is intended to increase transparency around contributed nonfinancial assets (also known as gifts-in-kind (GIK)) received by not-for-profit organizations, including information on how those assets are used and how they are valued. The adoption of this new standard resulted in expanded disclosure requirements for GIK as disclosed below for the years ended May 31, 2023 and 2022.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

Contributions of nonfinancial assets recognized in the consolidated statements of activities include the following for the years ended May 31:

	2023	2022
Utilized in Ministry programs:		
Meals	\$ 1,179,851	\$ 1,004,866
Clothing	72,727	61,939
Thrift store inventory	191,819	-0-
Other	-0-	1,049
	1,444,397	1,067,854
Special events supplies and services	794,494	803,038
	\$ 2,238,891	\$ 1,870,892

These gifts-in-kind are included in the consolidated statements of activities as follows for the years ended May 31:

	2023	2022
Support		
Gifts-in-kind	\$ 1,444,397	\$ 1,067,854
Special events		
Gift-in-kind support	794,494	803,038
	\$ 2,238,891	\$ 1,870,892

Donated meals utilized in Ministry programs are valued on a per pound basis using benchmarks from national food distribution organizations. Donated clothing and end of year thrift store inventory are valued at estimated thrift value for items of similar quality. Special events supplies and services are valued at their estimated fair market value (what would be paid for such items if purchased). All gifts-in kind are unrestricted during fiscal 2023 and 2022.

The donated items utilized in Ministry programs are utilized among a number of programs, including the Men's Residential Center, Shelter for Men, and Center for Women and Children in the greater Indianapolis, Indiana area, as well as the Training Center at Camp Hunt, and the Center for Men in Bloomington, Indiana.

Thrift store inventory is monetized in the Wheeler Mission Thrift Store. Total thrift store sales, included in program service revenue in the consolidated statements of activities, were \$942,234 and \$626,776 for the years ended May 31, 2023 and 2022, respectively.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

#### 13. LIQUIDITY AND AVAILABILITY OF RESOURCES

The following table reflects the Ministry's financial assets that are available to meet general expenditures within one year of the consolidated statement of financial position date at May 31:

	2023	2022
Financial assets		
Cash	\$ 1,041,114	\$ 1,448,628
Restricted cash	207,961	342,315
Accounts receivable, net	125,492	693,976
Contributions receivable, net	1,126,367	374,225
Government grants receivable	2,970,595	2,970,595
Investments	38,489,099	34,329,985
Note receivable	6,086,700	6,086,700
Total financial assets	50,047,328	46,246,424
Restricted cash	(207,961)	(342,315)
Contributions receivable not due within one year	(625,667)	(77,700)
Charitable gift annuities payable	(45,655)	(52,418)
Charitable remainder trust payable	(2,199,224)	(2,648,943)
Note receivable not due within one year	(6,086,700)	(6,086,700)
Net assets with donor restrictions		
Purpose restricted (net of construction in process expended in cash)	(4,166,436)	(1,878,843)
Time restricted for future periods	(1,380,222)	(1,384,923)
Endowment	(14,072,009)	(13,191,872)
Board designated net assets		
Endowment	(1,549,321)	(1,573,872)
Operating reserve	(500,000)	(500,000)
Financial assets available to meet cash needs for general expenditures within one year	\$ 19,214,133	\$ 18,508,838

The Ministry's board-designated net assets are designated by the Board of Directors to provide income to support general operations in the future, as well as an operating reserve. Although the Ministry does not intend to spend the board designated funds to meet general expenditures, the amounts could be made available, if necessary.

As more fully described in Note 7, the Ministry maintains a line of credit of \$1,000,000 with a bank available to be drawn upon as needed during the year. At May 31, 2023 and 2022, the Ministry has no outstanding borrowings and the full amount is available as needed to meet cash needs for general expenditures.

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

### NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

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#### 14. NEW MARKET TAX CREDITS PROJECT

In January 2020, the Ministry entered into a New Market Tax Credit (NMTC) financing transaction to fund a portion of the cost of construction and expansion of the Center for Women and Children. The NMTC program was provided for in the Community Renewal Tax Relief Act of 2000 (the Act) and is intended to induce capital investment in qualified low-income communities. The Act permits certain taxpayers to claim credits against their Federal income taxes for up to 39% of qualified investments in the equity of Community Development Entities (CDE). A CDE is a privately managed investment institution that is certified to make qualified low-income community investments (QLICI) loans. The NMTC structure includes the Ministry (through ESH), as a leverage lender, and the tax credit investor is Chase NMTC Wheeler Mission Investment Fund, LLC, an entity formed for purposes of NMTC transactions by Chase Bank, N.A.

In January 2020, Chase Community Equity, LLC made a \$9,000,000 capital contribution to Chase NMTC Wheeler Mission Investment Fund, LLC, a qualified equity investment fund. At the same time, the Ministry (through ESH as leverage lender) made a \$6,086,700 leveraged loan to the same investment fund (Note 2), resulting in a partial return of capital to Chase Community Equity, LLC. In turn, Chase NMTC Wheeler Mission Investment Fund, LLC made a \$9,000,000 capital contribution to IR CDE Twelve, LLC (sub-CDE), which is recognized as a qualified community development entity (noted above) or sub-CDE in this structure. After deducting certain fees associated with the transaction, the sub-CDE made two QLICI loans to the Ministry for a combined total of \$8,640,000. In this structure, the Ministry (through ESH) is designated as a qualified active low-income community benefit entity (QALICB). The QLICI loans bear interest at a rate of 1% and mature on December 1, 2054. Interest only payments due quarterly are made during the first seven years of the notes (Note 8).

The NMTC is subject to 100% recapture for a period of seven years as provided in the Internal Revenue Code. The Ministry is required to be in compliance with various regulations and contractual provisions that apply to the NMTC arrangement. Non-compliance with applicable requirements could result in projected tax benefits not being realized and, therefore, could require the Ministry to indemnify the investments for any loss or recapture of NMTCs related to the financing until such time as the Ministry's obligation to deliver tax benefits is relieved. The Ministry does not anticipate any credit recaptures in connection with this arrangement. This transaction includes a put / call provision that becomes effective at the end of the seven year compliance recapture period. Under the put provision, the Ministry may be obligated to purchase the investor's (CDE) interest in the Fund (Chase NMTC Wheeler Mission Investment Fund, LLC) for the sum of \$1,000 plus all transfer or excise taxes imposed on the investor. Under the call provision, the Ministry would be entitled to purchase the investor's interest in the Fund at fair market value. The Ministry believes the investor will exercise the put option in March 2027 at the end of the compliance recapture period. The value attributed to the put / call provision is de minimis.

# WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

## NOTES TO CONSOLIDATED FINANCIAL STATEMENTS MAY 31, 2023 AND 2022

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### 15. EMPLOYEE BENEFITS

#### Retirement Plan

The Ministry offers a voluntary 403(b) program open to all employees upon hire, which acts as the investment vehicle holding any employee contributions. This vehicle holds all of the Ministry's contributions made on behalf of employees, both matched and unmatched. To receive the Ministry's contributions, employees must meet the age and length of service requirements. It is the Ministry's policy to make contributions to the plan as provided annually by the Board of Directors. Contribution expense under this plan was \$300,808 and \$275,439 for the years ended May 31, 2023 and 2022, respectively.

#### Flexible Benefit Plan

The Ministry offers a flexible benefit plan through a Health Saving Account (HSA). The plan offers medical expense reimbursements for certain employees grandfathered into the plan. Employees can make voluntary contributions to the plan for medical expense reimbursements. The Ministry contributed \$29,463 and \$26,120 to the plan during the years ended May 31, 2023 and 2022, respectively.

#### Health Insurance

The Ministry provided its regular full-time employees with medical health insurance through January 2023. Regular full-time employees may choose to have their eligible family members covered under the health care plan as well. Participants were eligible to purchase coverage through the Ministry for dependents at their own expense by payroll deduction. For employees hired after June 1, 1992, the cost is paid for by the employee. After January 2023, all employees are responsible for their own health plan and the Ministry offered all employees a stipend for the increased premiums due to this change. Additionally, under the new program the Ministry is responsible for shared medical expenses, which are required to be paid in subsequent years. As of May 31, 2023 the Ministry had booked a liability of \$27,005 for these future payments. Participants should refer to the benefits booklet for a more complete description of the benefit provisions. Contribution expense under this plan was \$500,012 and \$696,054 for the years ended May 31, 2023 and 2022, respectively.

### 16. CONCENTRATIONS

The Ministry maintains its cash in accounts which generally exceed federally insured limits. The Ministry has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on cash.

All of the Ministry's investments are managed by one investment management firm. The Ministry was invested in one fund that comprised approximately 14% of total investments at May 31, 2023. There was no such concentration at May 31, 2022.

**WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES**

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS  
MAY 31, 2023 AND 2022

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As of at May 31, 2023, the Ministry has contributions receivable from one donor representing 50% of gross contributions receivable. As of at May 31, 2022, the Ministry has contributions receivable from four donors representing 60% of gross contributions receivable.

SUPPLEMENTARY INFORMATION

## WHEELER MISSION MINISTRIES, INC. AND SUBSIDIARIES

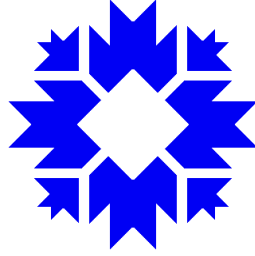
### CONSOLIDATED STATEMENT OF PROGRAM SERVICES EXPENSES YEAR ENDED MAY 31, 2023

(With Comparative Total for the Year Ended May 31, 2022)

	2023													2022 Total
	Men's Residential Center	Shelter for Men	Center for Women and Children	Camp Hunt	Industry	Edwards Residence	Thrift Shop	Ministry Services	Center for Men (Bloomington)	Center for Women and Children (Bloomington)	Food Services	Restored Creations	Total Program Services	
Salaries and benefits	\$ 829,067	\$ 1,534,247	\$ 1,728,390	\$ 500,905	\$ 192,595	\$ 71,610	\$ 729,012	\$ 1,237,564	\$ 510,672	\$ 151,490	\$ 2,965	\$ 47,868	\$ 7,536,385	\$ 7,057,706
Gift-in-kind expenses	149,444	416,285	323,513	108,454	-0-	-0-	-0-	-0-	254,883	-0-	-0-	-0-	1,252,579	1,066,803
Public relations and direct mailing	75	-0-	-0-	225	-0-	-0-	2,400	-0-	-0-	-0-	-0-	163	2,863	3,491
Telephone and utilities	134,154	129,015	179,529	147,951	37,313	13,030	60,029	3,579	59,159	18,702	-0-	225	782,686	665,410
Depreciation expense	130,694	222,976	729,162	120,614	94,693	4,918	40,267	-0-	66,599	14,534	-0-	-0-	1,424,457	1,299,977
Postage	-0-	2	-0-	246	-0-	25	-0-	-0-	-0-	-0-	-0-	1,134	1,407	1,084
Maintenance	64,279	92,053	93,430	37,855	6,694	5,744	68,337	48,579	30,566	5,016	-0-	-0-	452,553	431,048
Insurance	3,696	7,397	9,243	2,587	43,907	555	4,437	213,370	1,850	1,109	-0-	368	288,519	217,361
Food	45,200	78,231	71,826	27,979	3,698	-0-	-0-	-0-	7,825	-0-	-0-	-0-	234,759	957,984
Equipment repair and maintenance	38,053	22,242	66,979	49,630	25,084	5,761	38,076	12,615	11,452	694	88	4,564	275,238	194,903
Cleaning supplies	17,079	29,515	33,634	19,069	-0-	66	3,279	-0-	13,167	323	-0-	187	116,319	97,210
Fuel and oil	3,028	9,637	1,979	24,986	18,572	706	9,401	5,390	3,156	-0-	-0-	-0-	76,855	64,250
Professional services	-0-	175,722	221,175	90	-0-	-0-	12,455	-0-	1,727	-0-	-0-	-0-	662	411,831
Program materials	36,176	13,472	61,850	18,849	13	1,267	17,519	3,818	12,558	-0-	-0-	359	165,881	119,359
Office supplies	740	1,255	2,974	1,552	800	61	1,733	7,403	1,130	-0-	-0-	707	18,355	17,968
Staff travel and conferences	7,814	3,773	31,839	9,723	99	70	874	9,277	2,228	-0-	-0-	1,086	66,783	36,586
Industry and supplies	-0-	-0-	-0-	-0-	970,031	-0-	-0-	-0-	-0-	-0-	-0-	20,886	990,917	1,298,770
Grants and scholarships	8,150	-0-	-0-	22,105	-0-	800	-0-	-0-	-0-	-0-	-0-	-0-	31,055	29,575
Membership fees	30	651	357	324	651	200	-0-	15,097	135	-0-	-0-	(4)	17,441	19,376
Lockbox and bank fees	-0-	-0-	10	-0-	-0-	-0-	18,085	-0-	-0-	-0-	-0-	1,107	19,202	11,097
Facility lease and other costs	-0-	-0-	-0-	-0-	-0-	-0-	233,003	-0-	-0-	-0-	-0-	-0-	233,003	-0-
Miscellaneous	5,001	8,221	-0-	2,531	-0-	-0-	-0-	44,208	-0-	-0-	-0-	-0-	59,961	6,741
	<u>\$ 1,472,680</u>	<u>\$ 2,744,694</u>	<u>\$ 3,555,890</u>	<u>\$ 1,095,675</u>	<u>\$ 1,394,150</u>	<u>\$ 104,813</u>	<u>\$ 1,238,907</u>	<u>\$ 1,600,900</u>	<u>\$ 977,107</u>	<u>\$ 191,868</u>	<u>\$ 3,053</u>	<u>\$ 79,312</u>	<u>\$ 14,459,049</u>	<u>\$ 13,910,409</u>

See report of independent auditors on pages 1 through 3.



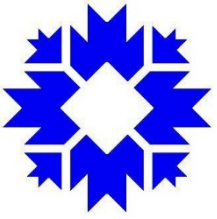


**City of Bloomington  
Office of the Common Council**

Jack Hopkins 2024

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Collaborative Applications



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Beacon, Inc

**Address:**

PO Box 451/2446 S. Henderson Bloomington, IN 47402/47401
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**Phone:** 812-334-5734

**E-Mail:** forrest@beaconinc.org

**Website:** www.beaconinc.org

**President of Board of Directors:** Melanie Vehslage

**Name of Executive Director:** Forrest Gilmore

**Phone:** 812-334-5734 x122

**E-Mail:** forrest@beaconinc.org

**Name of Grant Writer:** Danielle Sorden

**Phone:** 812-327-9391

**E-Mail:** danielle@beaconinc.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
25	3	~1500

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

Beacon is a solutions-driven, antipoverty organization, dedicated to aiding and empowering people experiencing extreme poverty, especially hunger and homelessness. Founded in 2000 in response to a growing community concern about the needs of people without homes, Beacon has grown rapidly these past 23 years to become the largest nonprofit housing provider in Monroe County. Beacon provides daytime and overnight shelter, hunger relief, permanent supportive housing, rapid re-housing, social services and case management, employment support, street outreach, eviction prevention, life essentials (restrooms, laundry, showers, mail, ID, etc.), and other health and human services to hundreds of adults and children each day and thousands each year.

Continental

Mission- Our team is committed to providing quality service to our residents and clients. Continental Management's primary objective is to provide the best possible living environment for every resident, creating a sense of ownership and pride and to continually enhance the surrounding neighborhoods where communities are located.

Vision- Continental Management's success in creating quality affordable housing is tied not only to site selection and design considerations, but its commitment to excellence in property management that makes a difference. This is done by creating new job opportunities and use of local vendors through construction and renovation efforts, as well as extra tax revenues to the community at large.

## PROJECT INFORMATION

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Name of the project to be funded:

Crawford room repairs and locking medical cabinet

Total cost of project: \$10,930

Requested amount of Jack Hopkins funding: \$10,930

Number of City residents to be served by this project in 2024: 130

Number of clients to be served by this project in 2024: 130

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$10,800 to repair flood damage to the two community rooms, the exercise room and the computer lab. We will convert the computer lab into a clinic room to improve our provision of professional medical and mental health care onsite. We need the community rooms to continue our food pantry and other services.

We are requesting \$130 to purchase a locking cabinet for medical supplies.

# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

Continental Management

**How do your missions, operations and services complement each other?**

Continental's mission is to provide quality affordable housing. Beacon's is to house our clients in permanent supportive housing. Beacon's supports help Continental's residents obtain and maintain their housing. Beacon's program could not function without a housing provider with the same goals.

**What is the existing relationship between agencies?**

Continental owns and operates the buildings at Crawford. Beacon provides the rent, Case Management, and Supportive Services. Beacon coordinates services from other agencies, like HealthNet and Hoosier Hills Food Bank, and Continental provides the space for those services.

**How will communication and coordination change as a result of the project?**

Our communication and coordination is already strong, so I don't expect significant changes. The two teams meet weekly to discuss the overlapping needs and goals of the programs there.

**Explain any challenges and steps you plan to take to address those challenges.**

This will be a fairly easy partnership to enact. We already have well established lines of communication and collaboration. This project will take some pressure off of Continental to fund the repairs to the building and technical equipment, so that they can focus on other issues.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

---

**Address where the project will be housed** (if different than agency address):

2446 S. Henderson St.  
Bloomington, IN 47401

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

Continental owns the property.

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

N/A

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

We are currently not seeking additional funding from other sources for this specific project.

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We plan to submit claims when the contractors bill us for the work. We anticipate being able to use the full amount of funding by December.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

HealthNet  
Hoosier Hills Food Bank  
Monroe County Health Department  
Monroe County Humane Association

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Repairs to Common Areas	\$10,800
Priority #2	Purchase a locking cabinet	\$130
Priority #3		
Priority #4		
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$10,930</b>



# JACK HOPKINS FUNDING CRITERIA

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## **NEED** (200 words or less)

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

The 2020-2024 Consolidated Plan list two of its core goals as "Housing/services to the homeless/near-homeless. Provide funds to support shelter operations and transitional housing. Acquisition, construction, or rehabilitation of temporary shelters and transitional housing for the homeless, including victims of domestic violence, veterans, disaster victims, families with children, unaccompanied youth, drug offenders, and formerly incarcerated persons. Provide funding to increase permanent supportive housing opportunities and work to create a stronger network of providers of supportive and mainstream services to homeless clients  
Goal Delivery of public services for seniors, persons with disabilities, youth, victims of domestic violence, abused and neglected children as well as childcare services, health and mental health services, food access, broadband access, transportation, non-homeless special needs and employment training.  
The requested projects would increase our ability at permanent supportive housing to provide services through a stronger network of providers.

## **ONE-TIME INVESTMENT** (100 words or less)

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

These improvements should last for the foreseeable future.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

Permanent supportive housing specifically targets the most vulnerable people experiencing homelessness in our community - the person with disabilities experiencing long-term homelessness. Most residents have tri-morbidity: a severe mental illness, a severe substance use disorder, and a chronic illness or physical disability. These three together prove lethal with the average age of death being 47 years old.

Residents of permanent supportive housing have better housing stability rates, better health outcomes, and better employment rates. Crawford Homes has been shown to both reduce emergency room use (65% drop in the first year) and interactions with the criminal justice system (between an 80-90% drop in arrests within 18 months.)

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

We expect the HealthNet clinic to see an average of 3-8 patients per week. Some of these will be prescribed medicine and seen onsite ongoing and some may be connected with their main clinic for more complicated medical concerns. We will be able to track these numbers.

We are already tracking the number of people who receive food pantry food.

The Health Department can track the number of people that they test for infectious diseases.

The Humane Association can track the number of emotional support animals they see.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Beacon and its program, Crawford Homes, are essential components in the Heading Home plan. Beacon is the regional lead for coordinated entry, the community-driven collaboration amongst service providers to house people without homes.

## 2024 Proposed Project Budget

Beacon Crawford/Continental

Services Spaces Renovation

Total Project Cost			
\$10,930			
	Totals	Other Income Sources	JHSS Grant
<b>Funds</b>			
<b>JHSS Grant</b>			\$10,930
HealthNet Services		\$2,695.68.	
Food Distribution		\$59,132	
Health Department		\$8,263	
Humane Assoc.		\$6,684	
<b>Total Project Funds</b>	\$10,930	\$76,774.68	\$10,930
<b>Expenses</b>			
Medical and Psychiatric Staff		\$2,695	
Food		\$59,132	
Infectious Disease Testing		\$8,263	
Veterinary staff, vaccines, pet food		\$6,684	
<b>Total Project Expenses</b>	\$10,930	\$76,774.68	\$10,930



Quigley Construction  
5103 White Springs rd.  
Spencer, IN 47460

3/24/2024

Work to be performed at Crawford house

Storage room  
drywall ceiling  
Paint Ceiling  
replace vinyl floor

Health Net Clinic (New)

install ceiling  
install hand sink  
remove existing counter

Laundry  
paint ceiling

existing Health Net clinic  
finish and paint ceiling

Kitchen  
Paint Ceiling

Total \$10,800<sup>00</sup>



## **Memorandum of Understanding**

Continental and Beacon, Inc

7/1/2024 – 6/30/2025

### **Purpose**

The purpose of the memorandum is to develop a framework of cooperation between Continental and Beacon, Inc. in order to manage a grant from the Jack Hopkins Social Service Funding Committee, which shall provide financial support for repairs and upgrades to the common areas and technical equipment at Crawford Apts 1 and 2.

### **Statement of mutual benefit:**

The residents, staff, and agencies of the Crawford Program will benefit with greater safety, improved health outcomes, increased quality of life, and greater housing stability from the better medical and psychiatric healthcare, better internet access, and greater security provided by the grant.

### **Continental Shall:**

Provide 61 apartments for the Crawford program, operating from a housing first and eviction prevention approach.

Provide property management to inspect units for lease compliance and communicate housing retention related concerns to Beacon.

Assist contractors with access to the necessary physical aspects of the buildings and provide information when needed.

### **Beacon Shall:**

Act as fiscal agent for any monies acquired from the Jack Hopkins Social Services grant.

Work with contractors to plan and execute repairs.

Coordinate with Social Service agencies to provide services in the improved spaces.

Track and record the outcomes required for any grants received.

### **Commencement, Termination & Expiration**

This instrument is executed on July 1<sup>st</sup>, 2024 through June 30<sup>th</sup>, 2025 and may be canceled at any time by any party with written 30 day notification.

**Principal Contacts**

The principal contacts for this instrument are:

Julie McCartney, CAPS Continental Mgt. 32500 Telegraph Rd. Ste. 100 Bingham Farms, MI 48025 Phone: 248.508.4017	Forrest Gilmore, Executive Director Beacon PO Box 451/620 S. Walnut St. Bloomington, IN 47402-0451 812-334-5734
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**Indemnification**

Continental and Beacon shall indemnify and hold harmless each other against and in respect to all actions, suits, proceedings, demands, assessments, judgments, costs and expenses, including without limitation reasonable attorneys' fees, whether brought by agency clients or third parties, incident to all liabilities resulting from or arising out of the Agreement.

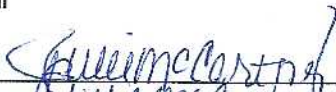
**Entire Agreement and Modification**

This Agreement constitutes the entire agreement of the parties concerning the subject matter hereof and supersedes all previous representation, understandings and agreements of the parties, whether oral or written, concerning the same. This Agreement may only be modified by a written document signed by the parties thereto.

**Governing Law**

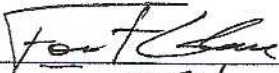
This Agreement shall be governed by and construed under the laws of the State of Indiana.

**Continental**

Signature   
Print Name Julie McCartney

Date 03/29/24

**Beacon**

Signature   
Print Name Forrest Gilmore

Date 3/27/2024

# Beacon, Inc

## Statement of Assets, Liabilities, and Net Assets — Modified Cash Basis

As of December 31, 2023

	TOTAL	
	AS OF DEC 31, 2023	AS OF DEC 31, 2022 (PY)
<b>ASSETS</b>		
Current Assets		
Bank Accounts		
10000 Old National Checking 9643	59,749	28,190
10002 Old National Savings 2314	18,176	18,158
10005 German American Bank 6001	514,180	540,367
10008 PayPal	10,806	6,887
<b>Total Bank Accounts</b>	<b>\$602,911</b>	<b>\$593,602</b>
Accounts Receivable		
11000 Accounts Receivable	61,852	7,050
<b>Total Accounts Receivable</b>	<b>\$61,852</b>	<b>\$7,050</b>
Other Current Assets		
12001 *Undeposited Funds	12,500	0
<b>Total Other Current Assets</b>	<b>\$12,500</b>	<b>\$0</b>
<b>Total Current Assets</b>	<b>\$677,263</b>	<b>\$600,652</b>
Fixed Assets		
18000 Land	140,981	140,981
18100 Land Improvements	21,225	21,225
18200 Buildings	177,879	177,879
18300 Building Improvements	396,804	396,804
18500 Equipment - FP	1,199	1,199
18600 Equipment	113,080	113,080
18700 Furniture and Fixtures	38,387	38,387
18800 Furniture and Fixtures - FP	8,650	8,650
19000 Accumulated Depreciation	(361,985)	(328,250)
<b>Total Fixed Assets</b>	<b>\$536,220</b>	<b>\$569,955</b>
Other Assets		
10004 Endowment	44,804	43,429
<b>Total Other Assets</b>	<b>\$44,804</b>	<b>\$43,429</b>
<b>TOTAL ASSETS</b>	<b>\$1,258,288</b>	<b>\$1,214,037</b>



# Beacon, Inc

## Statement of Assets, Liabilities, and Net Assets — Modified Cash Basis

As of December 31, 2023

	TOTAL	
	AS OF DEC 31, 2023	AS OF DEC 31, 2022 (PY)
<b>LIABILITIES AND EQUITY</b>		
Liabilities		
Current Liabilities		
Accounts Payable		
20001 Payables	0	(126)
<b>Total Accounts Payable</b>	<b>\$0</b>	<b>\$ (126)</b>
Credit Cards		
12102 CENTER CARD	18,263	
<b>Total Credit Cards</b>	<b>\$18,263</b>	<b>\$0</b>
Other Current Liabilities		
26000 Payroll Liabilities	0	0
26100 Flex Med Spending Ded	5,172	(0)
26200 Empl United Way Payable	112	(0)
26501 SIMPLE IRA \$ - ER Match	551	0
26550 SIMPLE IRA % - EE Withholding	1,091	0
<b>Total 26000 Payroll Liabilities</b>	<b>6,925</b>	<b>(0)</b>
<b>Total Other Current Liabilities</b>	<b>\$6,925</b>	<b>\$ (0)</b>
<b>Total Current Liabilities</b>	<b>\$25,189</b>	<b>\$ (126)</b>
<b>Total Liabilities</b>	<b>\$25,189</b>	<b>\$ (126)</b>
Equity		
30000 Opening Balance Equity	1,578	1,578
32000 Unrestricted Net Assets	1,067,432	1,012,429
33000 Restricted Net Assets	154,217	154,217
Net Revenue	9,871	45,939
<b>Total Equity</b>	<b>\$1,233,099</b>	<b>\$1,214,163</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$1,258,288</b>	<b>\$1,214,037</b>

### Note

No assurance has been provided on this financial statement.

Substantially all disclosures required by the modified cash basis of accounting are not included.

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
<b>Revenue</b>		
40000 Donations		3,350
40100 Individual Donations	492,160	439,024
40110 Individual - Events	49,512	31,687
40120 Individual - Merch	1,694	1,642
40130 Stock Donations	22,307	5,106
<b>Total 40100 Individual Donations</b>	<b>565,673</b>	<b>477,459</b>
40200 Faith Community Donations	19,290	37,322
40300 Corporate Donations	23,973	53,767
40310 Corporate - Events	46,050	44,640
<b>Total 40300 Corporate Donations</b>	<b>70,023</b>	<b>98,407</b>
40400 Organization Donations	76,786	129,639
41000 NAP Contributions	23,820	22,250
<b>Total 40000 Donations</b>	<b>755,592</b>	<b>768,427</b>
42000 Government Grants	428,834	361,033
42010 Federal Government Grants	961,416	1,293,505
42020 State/Local Grants	757,977	295,575
<b>Total 42000 Government Grants</b>	<b>2,148,227</b>	<b>1,950,113</b>
42500 Occupancy Fee Income	41,686	30,171
43000 Nongovernment Grants	30,793	25,700
48300 Fundraising Event Income		29
49000 Investment & Interest Income	869	297
49100 Other Types of Income	13,943	6,696
Uncategorized Income		7,051
<b>Total Revenue</b>	<b>\$2,991,109</b>	<b>\$2,788,484</b>
<b>GROSS PROFIT</b>	<b>\$2,991,109</b>	<b>\$2,788,484</b>
<b>Expenditures</b>		
60000 Personnel Expenses	1,759	522
60100 Salaries & Wages	944,979	940,731
60150 Yearly Bonus	14,828	8,971
60400 Payroll Taxes	80,018	86,753
60500 Zane Enrollment Fee	2,808	2,291
60550 Employee Life Insurance	10,099	3,414
60600 FSA Reimbursements	4,924	2,100
60625 TRowe Simple IRA	14,501	12,618
60650 Zane Reimbursements	40,807	31,159
60700 Workers' Compensation	14,938	27,437

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
60800 New Employee Costs	4,035	1,934
60900 Staff Support & Training	13,412	5,059
61100 Mileage & Travel Expense	5,316	5,950
61110 Vehicle Maintenance & Repair	1,084	215
61150 Gas - Van	222	299
<b>Total 61100 Mileage &amp; Travel Expense</b>	<b>6,622</b>	<b>6,464</b>
61200 Contract Services	648	650
61210 Accounting Fees	13,061	9,400
61220 Audit Costs	26,500	13,300
61230 Consulting Services	162,701	870
<b>Total 61200 Contract Services</b>	<b>202,910</b>	<b>24,220</b>
61300 Payroll Accounting Fees	5,892	3,953
<b>Total 60000 Personnel Expenses</b>	<b>1,362,533</b>	<b>1,157,626</b>
62000 Administrative Costs	198	2,231
62100 Office Supplies	2,321	6,251
62200 Postage & Mailing	1,046	2,048
62300 Internet	3,948	5,477
62400 Telephone	9,527	7,355
62500 Technology	16,233	12,055
62600 Memberships & Dues	5,122	1,654
62800 Marketing	12	
<b>Total 62000 Administrative Costs</b>	<b>38,408</b>	<b>37,071</b>
64000 Facility Expenses	3	681
64100 Facilities and Equipment	14,253	3,016
64200 Utilities	89	1,291
64201 Electricity	15,274	18,270
64202 Natural Gas	6,098	8,554
64203 Water	10,556	8,393
<b>Total 64200 Utilities</b>	<b>32,018</b>	<b>36,508</b>
64300 Waste Removal	5,623	5,013
64400 Snow Removal	65	170
64500 Fire Suppression	624	2,010
64600 Pest Control	1,440	2,843
64700 Security	5,492	4,160
64800 Custodial Supplies	11,598	13,607
64900 Kitchen Supplies	16,608	16,656
65000 Maintenance and Repair	10,069	5,105
65200 Property & Liability Insurance	3,389	10,768
65205 Flood Insurance	5,707	5,661
65400 Equipment Lease	5,204	5,291

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
73250 - Auto Insurance	3,708	4,066
<b>Total 64000 Facility Expenses</b>	<b>115,800</b>	<b>115,556</b>
64901 In-Kind Kitchen Supplies	45	
66000 Client Support	25,938	26,082
66100 Client Rents	1,072,029	1,041,790
66151 Last Month Lease Rent	2,832	2,300
66152 First Month Rent	16,166	3,103
66153 Rental Arrears	21,010	3,998
<b>Total 66100 Client Rents</b>	<b>1,112,038</b>	<b>1,051,190</b>
66150 Renters Insurance	1,506	1,892
66200 Client Security Deposits	64,226	40,527
66250 Client Application Fees	7,410	1,926
66251 Moving Cost	7,499	
66300 Client Utilities	54,071	53,269
66301 Client Utility Arrears	17,174	2,581
66302 Client Utility Deposit	7,505	785
<b>Total 66300 Client Utilities</b>	<b>78,750</b>	<b>56,634</b>
66350 Client Programming	259	
66500 Client ID/BMV Expenses	529	1,781
66501 Client Birth Certificate Expenses	1,557	110
<b>Total 66500 Client ID/BMV Expenses</b>	<b>2,086</b>	<b>1,891</b>
66600 HIP Payments	-200	
66700 Pharmacy	152	173
66800 Bus Tickets - Local	9,600	6,440
66900 Bus Tickets Out-of-Town	3,823	4,522
67000 Food	42,270	51,572
67300 Hygiene Pantry	278	8,771
67600 Other Client Needs	5,281	49,805
67700 Lyft Transportation	652	647
<b>Total 66000 Client Support</b>	<b>1,361,568</b>	<b>1,302,072</b>
66901 Reconciliation Discrepancies	77	149
68000 Fundraising Expenses	18,891	35,741
68100 Printing and Copying	16,892	9,709
68200 Postage - Fundraising	5,175	3,007
68250 Donor Relations	1,407	
68300 Fundraising Event Expenses	19,953	19,675
<b>Total 68000 Fundraising Expenses</b>	<b>62,318</b>	<b>68,133</b>
70000 Bank & Credit Card Fees	468	5,070
70001 PayPal Fees	2,642	1,685
72000 Depreciation Expense	33,735	33,735

# Beacon, Inc

## Statement of Revenues, Expenses, and Other Changes in Net Assets — Modified Cash Basis

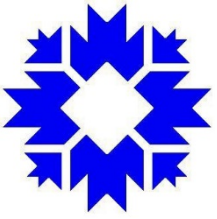
January - December 2023

	TOTAL	
	JAN - DEC 2023	JAN - DEC 2022 (PY)
73000 Miscellaneous Expense	3,644	13,294
74000 SIMPLE IRA (Offset Account)		847
<b>Total Expenditures</b>	<b>\$2,981,238</b>	<b>\$2,735,238</b>
NET OPERATING REVENUE	<b>\$9,871</b>	<b>\$53,246</b>
Other Revenue		
75000 Unrealized Gains / Losses		-7,307
<b>Total Other Revenue</b>	<b>\$0</b>	<b>\$ -7,307</b>
NET OTHER REVENUE	<b>\$0</b>	<b>\$ -7,307</b>
NET REVENUE	<b>\$9,871</b>	<b>\$45,939</b>

### Note

No assurance has been provided on this financial statement.

Substantially all disclosures required by the modified cash basis of accounting are not included.



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## CONTACT INFORMATION

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**Lead Agency Name:** Bloomington Food and Farm Council dba Bloomington Food Policy Council

**Address:**

642 N Madison St Bloomington, IN 47404
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**Phone:** N/A

**E-Mail:** bloomingtonfoodpc@gmail.com

**Website:** <https://www.uxdesignafall22.iuserveit.org/>

**President of Board of Directors:** Lauren McCalister (chair)

**Name of Executive Director:** N/A

**Phone:** (812) 818-7626

**E-Mail:** bloomingtonfoodpc@gmail.com

**Name of Grant Writer:** Lauren McCalister

**Phone:** same as above

**E-Mail:** same as above

## AGENCY INFORMATION

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**Is the Lead Agency a 501(c)(3)?**

Yes

No

**Number of Employees:**

Full-Time	Part-Time	Volunteers
0	0	5

### **MISSION STATEMENT** *(150 words or less)*

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

The Bloomington Food and Farm Council dba Bloomington Food and Policy Council (BFPC) is a group of community members committed to building food security by assessing the current food system. We achieve this by advocating for policy changes to improve it, and educating the public on concrete steps we can collectively take to assure everyone has access to affordable and nutritious food; with an emphasis on food produced regeneratively by local farmers and gardeners. The Bloomington Food and Farm Council serves as a 501c3 fiscal agent to the People's Cooperative Market (PCM); a local organization that strives to work towards inter-sectional anti-racism, create space for food justice in our food system while cultivating liberation and equity, and ensure access to local food, art, and education. People's Cooperative Market offers a Community Supported Agriculture (CSA) program, a farmers' market, a food pantry, SNAP matching, a sponsored box program, and more to support a local food system centered on equity, access, and community care.

Tandem Community Birth Center and Postpartum house's (Tandem) mission is to improve perinatal outcomes and a vision of a community where child-bearing families of all kinds have choices in the care they receive and find support and connection during these trans-formative years. Tandem offers members of our community who have limited resources and/or support networks during and after pregnancy a community meal train. Families receive one free nourishing meal a week for eight weeks. Our collaboration would provide free delivery of local nutrient dense produce, meat, eggs, bread and dairy for those families requesting food support.

# PROJECT INFORMATION

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Name of the project to be funded:

Nutrition Security: Giving Vulnerable Families agency in purchasing nourishing foods

Total cost of project: 32,576.00

Requested amount of Jack Hopkins funding: \$19,545.60

Number of City residents to be served by this project in 2024: 80-110

Number of clients to be served by this project in 2024: 80-110

## **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

Bloomington Food Policy Council requests \$19,545.60 to fund 16 weeks of food support for 14 families at Middle Way House and 8 families at Tandem Community Birth Center & Postpartum House. Every week families will choose a CSA delivery of \$85 worth of local nutrient-dense produce, eggs, bread, and meat. (\$33 produce share, \$40 meat share, \$7 bread, \$5 dozen eggs) We are requesting these funds to provide nutritional security to vulnerable families in the city of Bloomington who otherwise do not have a choice about the quality of food they consume.



# COLLABORATIVE PROJECTS

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**Is this a collaborative project?**

Yes

No

**If yes, list the name(s) of agency partner(s)**

Tandem Community Birth Center and Postpartum House  
Bloomington Food Policy Council

**How do your missions, operations and services complement each other?**

BFPC and Tandem missions align at the intersection of community needs and services. Families request support and we resource them to ensure that they are thriving while they work, eat, and live in Bloomington. Tandem established a nourishment program to support prenatal and postpartum families; similarly PCM provides and delivers sponsored boxes to MiddleWay house to families experiencing domestic violence.

**What is the existing relationship between agencies?**

PCM and Tandem serve on the east side of Bloomington, are community focused and provide services to vulnerable families to improve quality of life. BFPC and Tandem attend workshops and conferences about diversity, equity and inclusion as a priority for our services. We have overlapping clients. Tandem has employed Yvonne, as the full time ACE Director. Yvonne is also on the planning committee for the People's Cooperative Market working as the Urban Outreach and Development Director. PCM has furnished Tandem with a refrigerator to store the food and adhere to food safety guidelines.

**How will communication and coordination change as a result of the project?**

Communication and coordination between the agency partners will expand as a result of the project. Families who are requesting food support at Tandem will be directed to the project resources while learning about local food and producers. PCM is rooted in relationship building and will continue to hear directly from our partners about the opportunities for improvement and areas of success. Our partners are in weekly communication with our committee and volunteers about the changing needs of their clients.

**Explain any challenges and steps you plan to take to address those challenges.**

The only challenge was food storage and it has been resolved. PCM has furnished Tandem with a refrigerator to store the food and adhere to food safety guidelines.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

2420 E 3rd st, Bloomington, IN 47401

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**If the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

Bloomington Garden Club \$7,000.00 pending  
Tri-Kappa High Impact Grant \$5,700.00 pending  
Farm Aid Grant \$10,000.00 pending  
Door Dash \$1,000.00 confirmed

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

Claims for reimbursement will begin after the date that the Common Council allocates the Jack Hopkins funds via authorizing resolution until funds are exhausted. BFPC will submit claims for reimbursement for food purchases and delivery every week for 16 weeks. BFPC will submit claims for staffing every month. Our bookkeeper will ensure the accuracy of invoices and timely reimbursement to diminish any gap in services for the four months. (Estimated timeline July 2024 until November 2024)

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

Bloomington Garden Club \$7,000.00 pending (September 2024)  
Tri-Kappa High Impact Grant \$5,700.00 pending (May 2024)  
Door Dash \$1,000.00 confirmed (April 2024)

## **FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

People’s Cooperative Market has confirmed a \$1,000.00 grant from DoorDash for delivery charges for our sponsored box program. PCM committee members will provide 5 hours per week in kind to our operations, maintaining records, cleaning, organizing vendor meetings, recruiting, and training volunteers. Our volunteers will provide 5 hours a week in kind to order, aggregate, and distribute food on Saturdays during the farmers market. BFPC board members will provide 10 hours a month to grant writing for the continued financial support of the project beyond the grant period.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	<b>Item</b>	<b>Cost</b>
Priority #1	8 families at Tandem (\$85.00x 8=\$680.00)	<b>\$10,880.00</b>
Priority #2	14 families at Middle Way House (\$85.00x14= \$1,190.00)	<b>\$19,040.00</b>
Priority #3	Administration (24 hours per month/\$25 per hour=\$600.00)	<b>\$2,400.00</b>
Priority #4	DoorDash Delivery (\$8.00x 2=\$16.00)	<b>\$256.00</b>
Priority #5		
Priority #6		
Priority #7		
<b>Total Requested</b>		<b>\$19,545.00</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

As stated by the Community Health Rankings of 2023, Monroe County has a food insecurity rate of 13% (higher than Indiana as a whole, which stands at 11%). According to Feeding America, 16.8% of Monroe County residents (24,260 people) are food insecure, above the national food insecurity rate of 12.5%. The population in Bloomington receiving assistance for food access is almost entirely very low-income. Concerns related to deficient food access include the lack of transportation access, limiting not only the ability to get to food but also the financial burden of maintaining their vehicles or paying bus fare. Nutrition security is a multifaceted issue that requires collaboration between various service providers. Hoosiers are hungry for local food, and local farms thrive with the Cooperative Supported Agriculture (CSA) model, a pre-order model. Less than 1% of Monroe County residents are employed by farming. Farmers report financial benefit outcomes for the CSA model for the sponsored boxes. A standing order ensures the food will be sold and delivered at the freshest point. Farmers can do crop planning that is profitable because product sales are guaranteed. As a result, the food system in southern Indiana can be more stable.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

BFPC will continue to fundraise, write grants, and promote the PCM farmers market sales to support the project goal of providing nutrition security. The collaboration between PCM and Tandem will ensure that families served by one agency will be supported by the other to reduce the effects of poverty. The project will introduce CSA orders to families who receive SNAP to maximize their resources for access to nutrient-dense food. PCM will deliver for free to those families requesting food support to alleviate additional financial burdens.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

The long-term benefits include continuous improvement of the local economy, strengthened family ties, and improved access to high-quality local food for vulnerable populations. Families at MiddleWay House and Tandem can range from 1 parent and 1 child to 2 parents and multiple children, an estimate of 80-110 individuals. New families who access nutrient-dense food support experience improved social determinants of health. Nourished prenatal and postpartum parents can breastfeed their newborns and recover with less stress concerning how to source food. Families experiencing domestic violence with continuous food support experience improvements in mental health outcomes and a calmer nervous system. The choices of culturally relevant foods can alleviate loneliness for communities of color who cannot find foods from their culture. The 5-7 farmers/producers funded by the project will experience increased profits due to guaranteed sales, decreased time loss for transportation, decreased loss of product due to perishability, improvement to promotion, and decrease in gas emissions benefiting the environment. Establishing relationships between local producers and hungry local families bolsters the local economy by improving worker retention, and fewer sick days. Additionally, children nourished consistently will perform better in the classroom and experience fewer absences.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

The intended project outcome is to reduce hunger, alleviate the effects of poverty, and reduce susceptibility to disease for families supported by Middle Way House and Tandem. At least 80 residents of Bloomington will be continuously fed through the 16 weeks. Children relying on school meals will have nutrient-dense food options. 5-7 farmers/producers who have excess food products will make more income. 22 families who require food support will be introduced to local products. These families will have more time to cook together, build stronger family relationships, and have more money to spend in the local economy.

## OTHER COMMENTS *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

Informational article for the committee about food systems strategies.

<https://icleiusa.org/how-local-governments-support-community-led-food-systems-transformation/>

Conclusion: "While food choice is influenced by a range of determinants, the local food environment greatly impacts both food access and food choice. A supportive local food system which promotes the inclusion of a community voice, community connectedness, food literacy and physical and economic access to local produce is crucial to support food security."

For fifty years, Middle Way House (MWH) has been providing services to people in crisis. Middle Way House provides empowering services such as emergency shelter, a 24-hour help and crisis line, on-scene advocacy, support services, and transitional and permanent housing solutions to support survivors of domestic violence, sexual assault, and human trafficking. Currently, MWH hosts up to 28 families in their housing units and provides daycare for the children. However, budget constraints limit the food resources available to these vulnerable families. Since 2021, PCM has provided food weekly to MiddleWay house. Specifically, PCM has aimed to provide food for the children in the RISE transitional housing that is desirable and consistent. Community meals are prepared, packed lunches for the children, and a full fridge is provided through PCM's sponsored box program.

Tandem reports that nourishing food can improve outcomes including healthy birth weight and full-term pregnancy. The nutritional value of the milk provided by breastfeeding parents is dependent on the food consumed. Therefore, nutrition security will positively impact the parent and their children.

Annual Cost

CSA Box Sponsorship

\$85/month; 22 families

\$93,500.00

Box Delivery Costs

\$800.00

Administrative Personnel

\$25/hour; 24 hours/month

\$7,200.00

TOTAL

\$101,500.00

Request Amount			<b>\$19,545.60</b>
<b>14 families</b> at Middle Way House (\$85.00 per box x14 sponsored boxes per week= \$1,190.00)	<b>8 families</b> at Tandem Postpartum House (\$85.00 per box x 8 sponsored boxes per week=\$680.00)	<b>Delivery</b> DoorDash (\$8.00 per delivery x 2 deliveries per week=\$16.00)	<b>Administration</b> (24 hours per month x \$25 per hour=\$600.00)
WEEKLY for 16 weeks = \$19,040.00	WEEKLY for 16 weeks= \$10,880.00	Door Dash Delivery costs= \$256.00	MONTHLY for 4 months= \$2,400.00
Food cost: <b>\$29,920.00</b>		Delivery: <b>\$256.00</b>	Staff: <b>\$2,400.00</b>
TOTAL Project Cost			<b>\$32,576.00</b>
Other Income Sources: Grants-Bloomington Garden Club, Tri-Kappa High Impact Grant, DoorDash			\$13,700.00



# STATEMENT OF ACTIVITIES

Bloomington Food Policy Council  
January 1, 2023 to December 31, 2023

## Revenues

<i>4000 - Transfer IN - Grant</i>	79,279.39
<i>4100 - Transfer IN - PCM</i>	671.27
<b>Total Revenues</b>	<b>79,950.66</b>

## Expenses

<i>5000 - Food Purchase - Hoosier Hills Bank</i>	(2,459.69)
<i>5100 - Transfer OUT - PCM</i>	(77,479.39)
<i>5500 - General &amp; Administration</i>	(83.00)
<b>Total Expenditures</b>	<b>(80,022.08)</b>

<b>Net Deficit</b>	<b>(71.42)</b>
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# STATEMENT OF FINANCIAL POSITION

Bloomington Food Policy Council

As of December 31, 2023

## Assets

1100 - Cash 187.31

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**Total Assets 187.31**

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## Liabilities

(None) -

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**Total Liabilities -**

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## Net Assets

3100 - Without donor restrictions 187.31

3300 - With donor restrictions -

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**Total Net Assets 187.31**

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INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **MAY 15 2014**

BLOOMINGTON FOOD POLICY COUNCIL INC  
PO BOX 7542  
BLOOMINGTON, IN 47407-7542

Employer Identification Number:  
38-3853415  
DLN:  
17053141328003  
Contact Person:  
JOHN ALDAN III ID# 31695  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
October 7 2011  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No


Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Director, Exempt Organizations

Enclosure: Publication 4221-PC

Letter 947



2420 E. Third Street  
Bloomington, In 47401  
[firstuc.org](http://firstuc.org)

[info@firstuc.org](mailto:info@firstuc.org) /ph: 812-332-4439

March 27, 2024

Dear Jack Hopkins Social Services Grant Committee,

On behalf of First United Church, I am pleased to submit this Letter of Support for People's Cooperative Market's (PCM) grant application for the Jack Hopkins Social Services Grant to provide 16 weeks of food support for 14 families at Middle Way House and eight families at Tandem Community Birth Center & Postpartum House.

This project aligns with First United's values of creating communities that honor each person's dignity and worth, engaging one another and our wider community with openness and an appreciation of diversity, and our commitment to serve and promote the well-being of humanity and the world, specifically through working for justice for our most at-risk and vulnerable community members.

Since November 2023, First United has been privileged to support PCM by sharing space to house their weekly farmers' market, food packing for their Cooperative Supported Agriculture (CSA) and sponsored box programs, and various conferences and events. We have also committed to providing outdoor space to PCM for the construction of a high tunnel with hydroponic growing system ensuring that they will be able to grow and share fresh produce year-round and provide educational opportunities regarding urban agriculture.

Through our partnership with PCM, we have been able to better serve our congregation by offering convenient access to local nutrient-dense food, art, and education; families within our congregation who are food insecure are grateful recipients of weekly sponsored boxes at no cost to them. We have also been empowered to better serve other partner organizations with whom we share space, such as SCCAP Head Start and Area 10 Agency on Aging, and those whom we support financially and with other donations, such as Monroe County United Ministries. Because of the efforts of PCM, all three of these organizations have been able to provide food to individuals and families they serve either through PCM's provision of goods to the organization for distribution or directly to the families.

We are excited to continue our support of PCM's innovative work to foster a local food system centered on equity, access, and community care. We are confident that this project to provide local, nutrient-rich food support to families through Middle Way House and Tandem will enhance the lives of these vulnerable families, which will in turn enrich our wider community. We believe that People's Cooperative Market will be successful in their efforts if fully funded by the Jack Hopkins Social Services Grant.

Sincerely,

A handwritten signature in black ink, appearing to read "Jessica Petersen-Mutai".

Rev. Jessica Petersen-Mutai, Senior Minister

3/24/2024

Dear Jack Hopkins Social Services Grant Committee,

As a Farm-to-Table educational farm located in the City of Bloomington, GardenQuest supports the People's Cooperative Market's request for funding to provide the Middle Way House and the Tandem Postpartum House with 4 months of CSAs.

Not only will funding provide clients with food, but the nutrient content of the food provided in the CSA boxes will also be higher than food sourced from out-of-state farms. CSA boxes also promote seasonal eating and more diversity in the diet, which can lead to improvement in health.

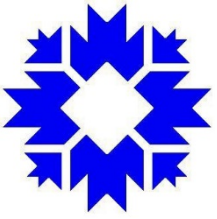
Thank you for considering the People's Cooperative Market for the Jack Hopkins Social Services Grant.

Sincerely,

Ellee Spier, GardenQuest Director

[gardenquest.org@gmail.com](mailto:gardenquest.org@gmail.com)

812-345-1549



**CITY OF BLOOMINGTON, COMMON COUNCIL  
JACK HOPKINS SOCIAL SERVICES FUNDING  
COMMITTEE 2024 GRANT APPLICATION**

## **CONTACT INFORMATION**

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**Lead Agency Name:** Stone Belt Arc, Inc.

**Address:**

2815 E. 10th St. Bloomington, IN 47408
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**Phone:** 812-332-2168

**E-Mail:** development@stonebelt.org

**Website:** www.stonebelt.org

**President of Board of Directors:** Carol-Anne Hossler

**Name of Executive Director:** Bitta DeWees

**Phone:** 812-332-2168 ext. 173

**E-Mail:** bdewees@stonebelt.org

**Name of Grant Writer:** Adam Hamel

**Phone:** 812-332-2168 ext. 269

**E-Mail:** development@stonebelt.org

## AGENCY INFORMATION

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Is the Lead Agency a 501(c)(3)?

Yes

No

Number of Employees:

Full-Time	Part-Time	Volunteers
328	116	10

### MISSION STATEMENT (150 words or less)

**Note to faith-based applicants:** If your organization is a faith-based agency, please provide the mission statement of your proposed project, not your agency. Please further note: 1) Hopkins funds may never be used for inherently religious activity; 2) Any religious activity must be separate in time or place from Hopkins-funded activity; 3) Religious instruction cannot be a condition for the receipt of services; and 4) Any Hopkins program must be open to all without a faith test.

At Stone Belt, we believe in the uniqueness, worth, and right to self-determination of every individual. Therefore, it is our mission, in partnership with the community, to prepare, empower, and support people with developmental disabilities and their families to participate fully in the life of the community. Our partnership agency, Down Syndrome Family Connection is a non-profit organization whose vision is to be a regionally-recognized advocacy base for individuals living, learning, and growing with Down syndrome.

## PROJECT INFORMATION

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Name of the project to be funded:

JobA-Palooza

Total cost of project: \$6,000

Requested amount of Jack Hopkins funding: \$6,000

Number of City residents to be served by this project in 2024: 300

Number of clients to be served by this project in 2024: 400

### **PROJECT SYNOPSIS** (200 words or less)

**Describe the project to be funded.** Begin your synopsis with the amount you are requesting and a concrete description of your proposed project. *Example - "We are requesting \$7,000 for an energy-efficient freezer to expand our emergency food service program."*

We are requesting \$6,000 to facilitate Job-A-Palooza for people of all ages and disabilities in October during Disability Employment Awareness Month. Job-A-Palooza is an event in which Stone Belt Arc provides a day of job exploration. Over 20 local employers will come to a one-day event, and each will set up a table and administer multiple job tasks to participants, who are adults with developmental disabilities. Participants can try job tasks from each employer and ask questions about employment. This year, we anticipate more computer-related tasks, multi-step tasks, and general and entry-level tasks such as cleaning and restaurant work. Participants will also practice their interview skills by completing a mock interview.



# COLLABORATIVE PROJECTS

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## Is this a collaborative project?

Yes

No

## If yes, list the name(s) of agency partner(s)

Our primary partner is Down Syndrome Family Connection. Other organizations that participate in Job-A-Palooza include Monroe County Community School Corporation, Vocational Rehabilitation, Richland-Bean Blossom Community School Corporation, and more.

## How do your missions, operations and services complement each other?

We all believe that our community is stronger when its needs are met, and people are allowed to succeed. Stone belt and Down Syndrome Family Connection both work to advocate for individuals with developmental disabilities in our community and hope to provide the greatest opportunities for growth in the individuals we support. All of the partner agencies in this project work collectively to meet the community's needs, and this project enables us to focus on employment opportunities for people of all ages with disabilities.

## What is the existing relationship between agencies?

Stone Belt has great relationship with Down Syndrom Family Connection and have partnered with the agency on multiple projects including Job-A-Palooza. We work to continually expand Job-A-Palooza and include more agency partners to address the community's needs and offer Job-A-Palooza to more participants and employers.

## How will communication and coordination change as a result of the project?

All agencies will work collectively together. The Employment Services Department at Stone Belt will provide overall communication and coordination wjhile Down Syndrome Family Connection will provide secondary support and assistance in outreach efforts.

## Explain any challenges and steps you plan to take to address those challenges.

The most evident challenge we anticipate is getting more employers and participants to attend the Job-A-Palooza compared to previous years. We plan to leverage the relationships of both Stone Belt's Employment Services teams and Down Syndrome Family Connection to encourage more employers to attend and encourage educational programs and disability service providers to send participants to Job-A-Palooza.

***For collaborative projects, please attach a signed Memorandum of Understanding to this application.***

# PROJECT LOCATION

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**Address where the project will be housed** (if different than agency address):

The Monroe County Convention Center  
302 S College Ave  
Bloomington, IN 47403

**Do you own or have site control of the property at which the project is to take place?**

Yes       No       N/A

**If you are seeking funds for capital improvements to real estate and if you do not own the property at which the project will take place, please explain your long-term interest in the property.** For example, how long has the project been housed at the site? Do you have a contract/option to purchase? If you rent, how long have you rented this property and what is the length of the lease? Be prepared to provide a copy of your deed, purchase agreement, or lease agreement upon the Committee's request.

N/A

**Is the property zoned for your intended use?**       Yes       No       N/A

If "no," please explain:

**If permits, variances, or other forms of approval are required for your project, please indicate whether the approval has been received.** If it has not been received, please indicate the entity from which the permitting or approval is sought and the length of time it takes to secure the permit or approval. *Note: Funds will not be disbursed until all requisite variances or approvals are obtained.*

N/A

# PROJECT COSTS

---

**Is this request for operational funds?** (e.g., salaries, rent, vouchers, etc),

Yes       No

**If “yes,” indicate the nature of the operational request:**

Pilot     Bridge     Collaborative  
 None of the above – General request for operational funds

**Other Expected Project Funds:** (Indicate source, amount, and whether confirmed or pending):

N/A

**Describe when you plan to submit your claims for reimbursement and what steps precede a complete draw down of funds:**

We will submit claims for reimbursement as soon as possible to ensure that all aspects of Job-A-Palooza meet the needs of the community.

**If completion of your project depends on other anticipated funding, please describe when those funds are expected to be received:**

N/A

**FISCAL LEVERAGING** (100 words or less)

**Describe how your project will leverage other resources** (e.g., other funds, in-kind contributions, or volunteers.)

We will utilize volunteers in most areas to decrease the amount of paid staff time needed to put this event on. Also, we will use in-kind donations and sponsorships where we can.

## FUNDING PRIORITIES – RANKED

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**If the Committee is unable to meet your full request, will you be able to proceed with partial funding?** (Due to limited funds, the Committee may recommend partial funding for a program)

Yes     No

**If “yes”, provide an itemized list of program elements, ranked by priority:**

	Item	Cost
Priority #1	Venue	\$650
Priority #2	Participant Materials	\$650
Priority #3	Volunteer Materials	\$1,600
Priority #4	Marketing	\$600
Priority #5	Decorations	\$300
Priority #6	Food and Drink for Volunteers	\$1,200
Priority #7	Participation Incentives	\$1,000
<b>Total Requested</b>		<b>\$6,000</b>

# JACK HOPKINS FUNDING CRITERIA

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## **NEED** *(200 words or less)*

Explain how your project addresses a previously-identified priority for social services funding as documented in the [Service Community Assessment of Needs](#), the City of Bloomington, Housing and Neighborhood Development Department's [2020-2024 Consolidated Plan](#), or any other community-wide survey of social service needs.

Nationally, people with disabilities are unemployed in higher numbers than people without disabilities. In 2022, just 21.3 % of people with disabilities were employed compared to 65.4 % of those who do not have disabilities, according to the Bureau of Labor Statistics. According to a report in 2020 through the U.S. Commission on Civil Rights, people with disabilities in sheltered work received an average wage of \$3.34/hour. Individuals placed in community jobs through Stone Belt's Community Employment department earn an average wage of \$11.46/hour. These rates are substantially lower than those for people without disabilities. Access to jobs that pay well is pivotal for people with disabilities to afford bare necessities like housing.

Job-A-Palooza will address the community's needs by using person-centered planning to specifically address the employment needs of people with disabilities and connect people with disabilities directly to employers in a safe and supportive setting. Job-A-Palooza allows many more people with disabilities to gain exposure to different work experiences than the traditional approach to disability employment services. Whether people with disabilities find employment in the community or start a self-employment venture, Job-A-Palooza will increase their ability to attain meaningful employment and meet their needs.

## **ONE-TIME INVESTMENT** *(100 words or less)*

**Jack Hopkins Funds are intended to be a one-time investment. Explain how your project fits this criterion.** If you are requesting operational funds (e.g., salaries, rent, vouchers, etc), you must detail your plan for future funding.

While we will always need some funding to put on events yearly, we believe that the community will be better with this resource fair available to people with disabilities of all ages. As this fair expands to other areas, gains new partners, and grows in visibility, it will be easier to find long-term sponsors for the event who see the impact that Job-A-Palooza has made in the community.

**LONG-TERM BENEFITS** (200 words or less)

**How will your project have broad and long-lasting benefits for our community?**

By doing person-centered planning to identify goals and plans to meet the needs of people with disabilities, we are giving them the tools they need to impact their daily lives significantly. By providing employer training to local businesses, we are ensuring that our community is meeting all its members' needs, some being the most vulnerable. When someone is employed, they become more self-sufficient and less reliant on other forms of assistance. With Job-A-Palooza, we hope to fill some of the needed open positions that local employers struggle to fill. We also believe that all people, regardless of disability, have the right to live and work in the community they are in.

**OUTCOME INDICATORS** (100 words or less)

**Describe the outcome indicators to be used to measure the success of your project.**

The ultimate outcome of a project (e.g., reduced hunger, homelessness or addiction rates) are often not readily observable within the Jack Hopkins funding period. For that reason, we are asking agencies to provide us with outcome indicators. In contrast to program activities (what you bought or did with grant funds) and the long-term impacts of a program (the lasting social change effected by your initiative), the data we seek are the short-term, preferably quantitative indicators used to measure the change your program has created during the period of your funding agreement. *Example: an agency providing a service might cite to the number of persons with new or improved access to a service.*

1. We hope to help over 75 area transition-age students discover employment paths.
2. We hope to help over 75 adults with disabilities discover employment paths.
3. We hope to work with over 20 local businesses to find employees for their open positions.
4. We hope to help over 150 people with disabilities identify goals to independence.
5. We hope to meet the needs of all people with disabilities that live in our community.

## **OTHER COMMENTS** *(500 words or less)*

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Use this space to provide other information you think the Committee would find useful. Any additional comments should supplement, not restate, information provided in the foregoing.

There are many resource fairs for different groups within the community; however, few specifically focus on people of all ages with disabilities. This collaboration will impact more people than holding smaller events which only meet the needs of Stone Belt clients. Job-A-Palooza was held in person in 2019, then online in 2020, and then a Job-A-Palooza Town Hall inviting employers to participate was held in 2021, and in-person again in 2022 and 2023 with the help of funding from Jack Hopkins. Many factors have impacted this, with COVID-19 being the most significant and staff shortage being another.

Lastly, we want to offer pre-Job-A-Palooza workshops. These workshops will help individuals with disabilities in the community identify goals that lead to successful independence using person-centered planning tools. Pre-Job-A-Palooza workshops for employers will also be offered to help any local business provide the best quality services to people with disabilities. At this workshop, we will provide employers with the tools to meet the needs of this diverse population. This will help both groups of people prepare for Job-A-Palooza.

# Job-A-Palooza - Budget 2024

<b>TOTAL PROJECT COST =</b>		<b>\$ 6,000.00</b>
	<b>JHSS Grant</b>	
<b>FUNDS</b>		
JHSS Grants	\$ 6,000.00	
<b>TOTAL PROJECT FUNDS</b>	<b>\$ 6,000.00</b>	
<b>EXPENSES</b>		
Venue	\$ 650.00	
Décor/Tables/ETC	\$ 300.00	
Participant Materials	\$ 650.00	
Marketing/Signage/SocialMedia	\$ 600.00	
Participation Incentives	\$ 1,000.00	
Volunteer Materials	\$ 1,600.00	
Food and drink for volunteers and employers	\$ 1,200.00	
<b>Total</b>	<b>\$ 6,000.00</b>	

Detailed Items Needed

Monroe County Convention Center

Balloons, table décor, etc.

Shirts, folders, etc for participants

Social media promotions

900 to employers baskets and 100 for 4 \$25 gift cards for attendees who complete the Treasure hunt.

Shirts, Materials, Etc.




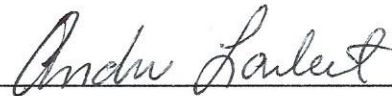
## Job-A-Palooza

### MOU

- We are requesting funds to facilitate Job-A-Palooza during Disability Employment Awareness Month in October of 2024.
- Job-A-Palooza is a joint effort between Stone Belt Arc and the Down Syndrome Family Connection that provides a day of job exploration for individuals with disabilities.
- Over 20 local employers will come to a one-day event. Each employer will set up a table with actual job tasks for participants to try; participants can also ask questions about employment. Participants can practice their interview skills by completing a mock interview.
- There will be pre-Job-A-Palooza workshops to help individuals with disabilities in the community identify goals that lead to successful independence using Person-Centered tools.
- Pre-Job-A-Palooza workshops for employers will also be offered to help any local business provide the best quality services to people with disabilities, and we will provide them with the tools to meet the needs of this diverse population.

By signing this agreement, it is understood that all parties agree and understand the terms above.

SIGN  DATE 3/18/2024  
PRINT Adam Hamel  
TITLE Director of Community Engagement, Stone Belt Arc

SIGN  DATE 3/26/2024  
PRINT ANDREW LAMBERT  
TITLE President, Down Syndrome Family Connection



**FINANCIAL STATEMENTS**

**JUNE 30, 2023 AND 2022**

*CPAs / ADVISORS*



**STONE BELT ARC, INC.**

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JUNE 30, 2023 AND 2022

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Blue & Co., LLC / 500 N. Meridian Street, Suite 200 / Indianapolis, IN 46204  
main 317.633.4705 fax 317.633.4889 email blue@blueandco.com

## REPORT OF INDEPENDENT AUDITORS

Board of Directors  
Stone Belt Arc, Inc.  
Bloomington, Indiana

### Opinion

We have audited the accompanying financial statements of Stone Belt Arc, Inc. (Stone Belt), a nonprofit organization, which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities and changes in net assets, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Stone Belt as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

### Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America and the *Uniform Compliance Guidelines for Examination of Entities Receiving Financial Assistance from Governmental Sources*, issued by the Indiana State Board of Accounts. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Stone Belt and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Change in Accounting Principle

As discussed in Note 2 to the financial statements, Stone Belt adopted Financial Accounting Standards Board Accounting Standards Update No. 2016-02, *Leases (Topic 842)*. Our opinion is not modified with respect to this matter.

### Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Board of Directors  
Stone Belt Arc, Inc.  
Bloomington, Indiana

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Stone Belt's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

#### Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is substantial likelihood that, individually or in the aggregate, they would influence the judgement made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgement and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Stone Belt's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgement, there are conditions or events, considered in the aggregate, that raise substantial doubt about Stone Belt's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

*Blue & Co., LLC*

Indianapolis, Indiana  
October 25, 2023

**STONE BELT ARC, INC.**

STATEMENTS OF FINANCIAL POSITION  
JUNE 30, 2023 AND 2022

**ASSETS**

	2023	2022
<b>Current assets</b>		
Cash	\$ 2,606,595	\$ 7,380,050
Contract receivables, net	1,025,318	1,072,407
Prepaid expenses	129,332	135,009
Contribution receivable, net	81,125	75,000
Other current assets	63,457	187,347
Total current assets	3,905,827	8,849,813
<b>Contribution receivable, net</b>	262,923	28,892
<b>Assets whose use is limited</b>	4,572,298	706,802
<b>Right-of-use assets under operating leases, net</b>	760,953	-0-
<b>Property and equipment, net</b>	3,237,480	3,222,287
Total assets	\$ 12,739,481	\$ 12,807,794

**LIABILITIES AND NET ASSETS**

<b>Current liabilities</b>		
Current portion of operating lease liabilities	\$ 311,736	\$ -0-
Accounts payable	183,303	230,980
Accrued wages and related liabilities	1,003,948	1,183,928
Refundable advances	544,962	-0-
Total current liabilities	2,043,949	1,414,908
<b>Operating lease liabilities, net of current portion</b>	452,065	-0-
Total liabilities	2,496,014	1,414,908
<b>Net assets</b>		
Without donor restrictions		
Undesignated	5,327,121	10,813,933
Board designated	4,471,847	374,610
Total without donor restrictions	9,798,968	11,188,543
With donor restrictions	444,499	204,343
Total net assets	10,243,467	11,392,886
Total liabilities and net assets	\$ 12,739,481	\$ 12,807,794

See accompanying notes to financial statements.

**STONE BELT ARC, INC.**

STATEMENTS OF ACTIVITIES AND CHANGES IN NET ASSETS  
YEARS ENDED JUNE 30, 2023 AND 2022

	2023	2022
<b>Revenues and support</b>		
Residential program	\$ 17,509,288	\$ 19,065,788
Day program	1,113,866	878,755
Clinic service revenue	348,950	480,322
Manufacturing services revenue	623,489	628,764
Leased employee revenue	295,584	512,532
Grant revenue	441,078	3,100,953
Contributions and other support	964,931	863,469
Investment return (loss)	99,012	(75,532)
Other	31,102	67,872
Net assets released from restrictions	75,000	75,000
Total revenues and support	21,502,300	25,597,923
<b>Expenses</b>		
Salaries, wages and benefits	18,357,736	19,789,936
Professional fees	204,439	217,071
Purchased services	365,403	316,149
Supplies	720,134	659,519
Rent and leases	517,685	532,851
Utilities and telephone	583,487	558,856
Depreciation	403,281	364,495
Repairs and maintenance	267,318	268,297
Dues and subscriptions	321,947	252,195
Insurance	189,244	159,381
Vehicle	225,991	252,125
Travel and training	225,466	202,035
Provider tax	472,785	441,721
Interest	-0-	37,332
Other	36,959	115,213
Total expenses	22,891,875	24,167,176
Change in net assets without donor restrictions	(1,389,575)	1,430,747
<b>Change in net assets with donor restrictions</b>		
Gifts-in-kind rent contributions	315,156	6,769
Net assets released from restrictions	(75,000)	(75,000)
Change in net assets with donor restrictions	240,156	(68,231)
Change in net assets	(1,149,419)	1,362,516
<b>Net assets</b>		
Beginning of year	11,392,886	10,030,370
End of year	\$ 10,243,467	\$ 11,392,886

See accompanying notes to financial statements.

**STONE BELT ARC, INC.**

STATEMENTS OF CASH FLOWS  
YEARS ENDED JUNE 30, 2023 AND 2022

	2023	2022
<b>Operating activities</b>		
Change in net assets	\$ (1,149,419)	\$ 1,362,516
Adjustments to reconcile change in net assets to net cash flows from operating activities		
Restricted contributions and support	(315,156)	(6,769)
Depreciation	403,281	364,495
Amortization of discount on contribution receivable	1,229	(6,769)
Amortization of debt issuance costs	-0-	12,526
Realized gain on investments	(103,978)	(24,130)
Unrealized loss on investments	6,741	100,746
Changes in operating assets and liabilities		
Contract receivables	47,089	200,807
Grants receivable	-0-	3,753,109
Prepaid expenses	5,677	(53,458)
Contribution receivable	(241,385)	75,000
Other current assets	123,890	32,702
Right-of-use assets under operating leases, net	(760,953)	-0-
Accounts payable	(52,863)	133,027
Accrued wages and related liabilities	(179,980)	188,668
Refundable advance	544,962	-0-
Operating lease liabilities	763,801	-0-
Net cash flows from operating activities	(907,064)	6,132,470
<b>Investing activities</b>		
Purchase of property and equipment	(413,288)	(566,397)
Purchase of investments	(4,388,567)	(77,514)
Proceeds from sale of investments	620,308	71,932
Net cash flows from investing activities	(4,181,547)	(571,979)
<b>Financing activities</b>		
Restricted contributions and support	315,156	6,769
Principal payments on long-term debt	-0-	(1,023,174)
Net cash flows from financing activities	315,156	(1,016,405)
Net change in cash	(4,773,455)	4,544,086
<b>Cash</b>		
Beginning of year	7,380,050	2,835,964
End of year	\$ 2,606,595	\$ 7,380,050
<b>Supplemental cash flows information</b>		
Cash paid for interest	\$ -0-	\$ 24,806
Property included in accounts payable	\$ 5,186	\$ -0-

See accompanying notes to financial statements.



# STONE BELT ARC, INC.

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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### 1. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

#### Organization

Stone Belt Arc, Inc. (Stone Belt) is incorporated as a not-for-profit organization, under the laws of the State of Indiana. The primary purpose, mission, and principal activities are to prepare, empower, and support persons with developmental disabilities and their families to participate fully in the life of the community. Stone Belt serves children and adults with developmental disabilities and children at risk for developmental disabilities in a seven-county area in south central Indiana. A summary of Stone Belt's significant programs include:

- Manufacturing Services - providing training and employment experience in a manufacturing setting.
- Community Employment Services - providing training on skills related to seeking, obtaining and holding a job in the community.
- Employment Fundamentals - providing training in social inclusion, active citizenship and identity development with the goal of increasing independence.
- Community Living Services - providing supervised residential services in a variety of settings from 24-hour supervision to semi-independent support for apartment living.
- Transportation Services - represents the costs of transporting clients between facilities and employment locations and maintenance of the transportation facilities.
- Behavioral Health Services - certified outpatient mental health clinic providing care to children, adolescents and individuals with disabilities.

#### Use of Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

#### Cash

Stone Belt maintains its cash in bank deposits accounts which, at times may exceed federally insured limits. Stone Belt has not experienced any losses in such accounts and believes it is not exposed to any significant credit risk on cash.

#### Contract Receivables

Contract receivables are recorded at the net realizable amounts based on established charges when the service is rendered. Stone Belt has agreements with third-party payors that provide for payments to Stone Belt at amounts different from its established rates. Payment arrangements include prospectively determined rates, discounted charges and per diem payments.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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The allowances offset against contract receivables represents management's estimate of the expected losses to be realized, and is based on historical experience, current economic conditions, and other relevant factors. Periodically, management reviews contract receivables and adjusts the allowance based on current circumstances and charges off uncollectible receivables when all attempts to collect have failed. All contract receivables are expected to be collected within one year. As of June 30, 2023 and 2022, Stone Belt recorded allowances against contract receivables of approximately \$48,000 and \$71,000, respectively. Contract receivables and the associated allowance were \$1,340,000 and \$67,000, respectively, as of July 1, 2021.

#### Grants Receivable

Grants receivable represent amounts awarded by various government agencies. Grants receivable are due within one year and are recorded at their net realizable value. Management estimates an allowance for uncollectible grants receivable based on current economic conditions, historical trends, and current and past experience with the individual grantors. Management determined that no allowance was necessary as of June 30, 2023 and 2022.

The Coronavirus Aids, Relief, and Economic Security (CARES) Act included a provision for the Employee Retention Tax Credit (ERTC). The ERTC is a fully refundable tax credit for employers equal to 70 percent of qualified wages (including allocable qualified health plan expenses) that eligible employers pay their employees. The ERTC applies to qualified wages paid in calendar year 2021. The credit is 70% of the first \$10,000 in wages per employee in each quarter of calendar year 2021 meaning the ERTC is worth up to \$7,000 per quarter and up to \$28,000 per calendar year, for each employee. Stone Belt recognized \$-0- and approximately \$2,129,000 of ERTC as grant revenue during 2023 and 2022, respectively.

#### Assets Whose Use Is Limited

Assets whose use is limited consist of board designated funds, amounts designated for reserve requirements, and donor restricted endowment. The assets consist of mutual funds and fixed income securities, recorded at fair value, and cash and cash equivalents. Stone Belt considers interest, dividends, realized and unrealized gains and losses on investments as a component of investment return in the statements of activities and changes in net assets. Funds designated for reserve requirements that serve as collateral for a letter of credit related to workers compensation and employers liability were approximately \$-0- and \$232,000 as of June 30, 2023 and 2022, respectively.

Additionally, Stone Belt benefits from the investment return earned related to approximately \$87,000 of funds held by the Community Foundation of Bloomington and Monroe County (the Foundation). These funds are not recorded in Stone Belt's financial statements since the Foundation has variance power over the funds.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### Property, Equipment and Depreciation

Property and equipment are stated at cost or, if donated, at fair market value on the date of acquisition. Additions and improvements are capitalized based on certain dollar thresholds; expenditures for routine maintenance are charged to operations. Depreciation is provided over the estimated useful lives of the various classes of assets on the straight-line method. The estimated useful lives are as follows:

<u>Description</u>	<u>Range of Useful Lives</u>
Land improvements	10-40 years
Buildings and improvements	10-40 years
Furniture and equipment	3-10 years
Vehicles	5-7 years

Gifts of long-lived assets such as land, buildings and equipment are reported as support without donor restrictions unless explicit donor stipulations specify how the assets are to be used. The gift of cash and other assets that must be used to acquire long-lived assets are reported as donor restricted support. Absent explicit donor stipulations about how long-lived assets must be maintained, expirations of donor restrictions are reported when the donated acquired long-lived assets are placed in service.

#### Net Assets

The accompanying financial statements have been prepared on the accrual basis, and have been prepared with a focus on the entity as a whole. Net assets, support, revenues, gains, and losses are classified based on the existence or absence of donor restrictions. Accordingly, the net assets of Stone Belt are classified and reported as follows:

- Net assets without donor restrictions: Net assets that are currently available for operating purposes under the direction of the board or designated by Stone Belt for specific use. Designated net assets approximated \$4,472,000 and \$375,000 as of June 30, 2023 and 2022, respectively.
- Net assets with donor restrictions: Net assets subject to donor stipulations for specific operating purposes or time restrictions. These include donor restrictions requiring the net assets be held in perpetuity or for a specified term with investment return available for operations or specific purposes. Net assets with donor restrictions as of June 30, 2023 and 2022 were related to net assets with time restrictions of approximately \$344,000 and \$104,000, respectively. Net assets restricted for endowment were \$100,000 as of June 30, 2023 and 2022. Net assets released from restrictions in 2023 and 2022 were \$75,000 related to meeting donor time restrictions.

# STONE BELT ARC, INC.

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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### Revenue Recognition

#### *Residential and Day Programs*

Stone Belt contracts with various State of Indiana (the State) agencies to provide a wide variety of services to persons with disabilities, including residential and day services. Stone Belt vouchers the State agencies based on current activity and the original amount of the contract. These services, rendered to Medicaid waiver program beneficiaries, are paid utilizing a determined daily consumer rate. These services are paid at prospectively determined rates. Stone Belt recognizes the amount of revenue it expects to collect for the transfer of services to clients over time in the period in which its performance obligations are satisfied.

Service revenues are recognized over time as promised services are delivered to clients, in an amount that reflects the consideration Stone Belt expects to be entitled to in exchange for those services. Service revenue from contracts with various third-party payers is recognized in the amount to which Stone Belt has a right to invoice, (generally determined and billed on a weekly to monthly basis), when services are rendered by Stone Belt. Generally, the transaction price in contracts is known at inception and the performance obligation is measured from the commencement of the services to the point when Stone Belt is no longer required to provide services. Stone Belt submits annual cost reports to determine its Medicaid rates for residential services. These reports are subject to periodic audit by the State. Based upon reports previously submitted and unaudited periods, Stone Belt has determined that any liability related to unsettled Medicaid cost reports would be not be significant to the financial statements as a whole as of June 30, 2023 and 2022.

Laws and regulations governing the Medicaid programs are complex and subject to interpretation. Stone Belt believes that it is in compliance with all applicable laws and regulations and is not aware of any pending or threatened investigations involving allegations and potential wrongdoing. While no such regulatory inquiries have been made, compliance with such laws and regulations can be subject to future government review and interpretations as well as significant regulatory action including fines, penalties, and exclusion from the Medicaid programs.

#### *Clinic Service Revenue*

Stone Belt operates a behavioral health clinic, Milestones Health Clinic, as a department of Stone Belt. Clinic service revenue is reported at the amount that reflects the consideration to which Stone Belt expects to be entitled in exchange for providing patient care. These amounts are due from patients, third-party payors (including health insurers and government payors), and others and includes variable consideration for retroactive revenue adjustments due to settlement of audits, reviews, and investigations. Generally, Stone Belt bills the patients and third-party payors several days after the services are performed. Revenue is recognized as the performance obligations are satisfied.

Performance obligations are determined based on the nature of the services provided by Stone Belt. Revenue for performance obligations satisfied over time is recognized based on actual charges incurred in relation to total expected (or actual) charges. Stone Belt believes that this method provides a faithful depiction of the transfer of services over the term of the performance obligation based on the inputs needed to satisfy the obligation. Generally, performance obligations satisfied over time relate to patients receiving services in outpatient centers. Stone Belt measures the performance obligation from the

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## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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commencement of the service to the point when it is no longer required to provide services to that patient, which is generally at the time of completion of the services. The method of reimbursement for Stone Belt is fee for service. The timing of revenue and recognition for healthcare services is transferred over time.

Stone Belt determines the transaction price based on standard charges for goods and services provided, reduced by contractual adjustments provided to third-party payors, discounts provided to uninsured patients in accordance with Stone Belt's policy, or implicit price concessions provided to uninsured patients. Stone Belt determines its estimates of contractual adjustments and discounts based on contractual agreements, its discount policies, and historical experience. Stone Belt determines its estimate of implicit price concessions based on its historical collection experience with this class of patients.

Given the current regulatory and reimbursement environment, there can be no assurances that adequate reimbursement levels will continue to be available for clinic services provided by Stone Belt. Significant limits on the scope of services reimbursed and on reimbursement rates and fees could have a material adverse effect on Stone Belt's liquidity, financial condition, and results of operations.

#### *Manufacturing Services Revenue*

Stone Belt recognizes revenue from providing manufacturing services to various local employers. Revenues are recognized over time as promised services are delivered to the employers, in an amount that reflects the consideration Stone Belt expects to be entitled to in exchange for those services. Revenue is recognized in the amount to which Stone Belt has a right to invoice, (generally determined and billed on a weekly to monthly basis), when services are rendered by Stone Belt. Generally, the transaction price in contracts is known at inception and the performance obligation is measured from the commencement of the services to the point when Stone Belt is no longer required to provide services.

#### *Leased Employee Revenue*

Stone Belt has a leased employee agreement with Centerstone, a nonprofit licensed behavioral health care organization that provides behavioral health services in Indiana. The agreement allows Stone Belt to lease employees to Centerstone for the purposes of providing Medicaid Rehabilitation Option services and Medicaid Clinic Services to Medicaid eligible Residential Waiver and Non-Residential clients. Revenues are recognized over time as promised services are delivered to Centerstone, in an amount that reflects the consideration Stone Belt expects to be entitled to in exchange for those services. Revenue is recognized in the amount to which Stone Belt has a right to invoice, (generally determined and billed on a weekly to monthly basis), when services are rendered by Stone Belt. Generally, the transaction price in contracts is known at inception and the performance obligation is measured from the commencement of the services to the point when Stone Belt is no longer required to provide services. The agreement is renewable annually and can be terminated by either party with appropriate written notice.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### *Grants and Contributions and Other Support*

Contributions from the general public, governmental agencies, philanthropic foundations, and other organizations are recognized as support in the period when cash, securities, or other assets, or an unconditional promise to give is received. Contributions that are not restricted by the donor or restricted by time are reported as an increase in net assets without donor restrictions. Contributions that are restricted by the donor are reported as an increase in net assets without donor restrictions if the restriction is met in the reporting period in which the revenue is received. Expirations of donor restrictions on net assets, either by fulfillment of the stipulated purpose or the passage of time, are reported as reclassifications between the applicable classes of net assets. Conditional promises to give – that is, those with a measurable performance or other barrier and a right of return – are not recognized until the conditions on which they depend have been met.

Stone Belt also evaluates whether a contribution is unconditional or conditional based on the absence or presence of barriers and any right of return provisions. Receipt of funds for conditional contributions are recorded as a refundable advance in the statement of financial position until conditions are satisfied. Once satisfied, the refundable advance is released into contribution revenue. Stone Belt recognized refundable advances of approximately \$545,000 and \$-0- as of June 30, 2023 and 2022, respectively. Materials, property, equipment, and other assets received as donations are recorded and reflected in the accompanying financial statements at their estimated fair market values on the date received. During 2023 and 2022, Stone Belt recognized for gifts-in-kind (GIK) rent contributions of approximately \$315,000 and \$7,000, respectively, for the land on which Stone Belt's primary campus is located. The valuation and inputs used to determine fair value of the GIK rent contributions were based on sales of similar properties in the geographic area using a market derived discount/capitalization rate.

The value of donated volunteer services is not reflected in the accompanying financial statements since there is no objective basis available by which to measure the value of such services. However, a substantial number of volunteers have donated significant amounts of their time to various fund-raising events and contacts with individuals receiving services at Stone Belt.

#### Malpractice Coverage

Stone Belt participates in the State of Indiana Patient Compensation Fund (the Fund) and is covered under the Indiana Medical Malpractice Act (the Act). The Act provides for a maximum recovery of \$1,650,000 per occurrence (\$8,000,000 annual aggregate based on Stone Belt's size), \$400,000 of which would be paid through Stone Belt's malpractice insurance coverage and the balance would be paid by the Fund.

Stone Belt has commercial insurance for malpractice (in addition to coverage under the Act) under a claims-made policy, whereby only the claims reported to the insurance carrier during the policy period are covered regardless of when the incident giving rise to the claim occurred. Under the terms of the policy, Stone Belt bears the risk of the ultimate costs of any individual claims exceeding \$250,000, if not covered under the Act, or aggregate claims exceeding \$5,000,000, if not covered under the Act, for claims asserted in the policy year. Should the claims-made policy not be renewed or replaced with equivalent insurance, claims based on the occurrences during the claims-made term, but reported subsequently, will be uninsured. Stone Belt is not aware of any medical malpractice claims, either asserted or unasserted, that would exceed the policy limits.

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## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### Marketing and Community Relations

Stone Belt expenses marketing and community relations costs as incurred. The total expense for 2023 and 2022 was approximately \$138,000 and \$95,000, respectively.

#### Income Taxes

Stone Belt is organized as not-for-profit corporation under Section 501(c)(3) of the United States Internal Revenue Code. As such, Stone Belt is generally exempt from income taxes. However, Stone Belt is required to file Federal Form 990 – Return of Organization Exempt from Income Tax, which is an informational return only.

Accounting principles generally accepted in the United States of America require management to evaluate tax positions taken by Stone Belt and recognize a tax liability if Stone Belt has taken an uncertain position that more likely than not would not be sustained upon examination by various federal and state taxing authorities. Management has analyzed the tax positions taken by Stone Belt, and has concluded that as of June 30, 2023 and 2022, there are no uncertain positions taken or expected to be taken that would require recognition of a liability or disclosure in the accompanying financial statements. Stone Belt is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress.

Stone Belt filed its federal and state income tax returns for periods through June 30, 2022. These income tax returns are generally open to examination by the relevant taxing authorities for a period of three years from the later of the date the return was filed or its due date (including approved extensions).

#### Going Concern Evaluation

Management evaluated whether there are conditions or events that raised substantial doubt about Stone Belt's ability to continue as a going concern for a period of one year from the date the financial statements were available to be issued.

#### Subsequent Events

Stone Belt evaluated events or transactions occurring subsequent to the financial position date for recognition and disclosure in the accompanying financial statements through the date the financial statements were available to be issued which was October 25, 2023.

# STONE BELT ARC, INC.

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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### **2. CHANGE IN ACCOUNTING PRINCIPLE**

On July 1, 2022, Stone Belt adopted the lease accounting standard issued by the Financial Accounting Standards Board (FASB) and codified in the Accounting Standards Codification (ASC) as Topic 842 (ASC 842). The lease standard in ASC 842 intended to improve financial reporting about leasing transactions by requiring entities to recognize on the statement of financial position the assets and liabilities for the rights and obligations created by those leases, and to provide additional disclosures regarding the leases. Leases with terms (as defined in ASC 842) of twelve months or less are not required to be reflected on an entity's statement of financial position.

Stone Belt applied the modified retrospective approach to all lease agreements when adopting ASC 842 which was applied retrospectively to the beginning of the period of adoption through a cumulative-effect adjustment recognized as of July 1, 2022. Prior period amounts have not been adjusted and continue to be reported in accordance with the previous accounting guidance in ASC 840. The adoption of ASC 842 had a material impact on the statement of financial position but did not have a significant impact on the statements of activities and changes in net assets, and cash flows. As of July 1, 2022, Stone Belt's total assets increased by approximately \$446,000 and total liabilities increased by \$450,000 as a result of ASC 842. The most significant impact was the recognition of right-of-use (ROU) assets under operating leases and operating lease liabilities for operating leases.

Stone Belt elected the available practical expedients to account for its existing capital leases and operating leases as finance leases and operating leases, respectively, under the new guidance, without reassessing (a) whether any expired or existing contracts contain a lease, (b) whether classification of capital leases or operating leases would be different in accordance with the new guidance, or (c) whether the unamortized initial direct costs, if any, before transition adjustments would have met the definition of initial direct costs in the new guidance at lease commencement. In addition, Stone Belt elected the hindsight practical expedient to determine the lease term for existing leases.

### **3. CONTRIBUTION RECEIVABLE**

Stone Belt has a non-cancellable lease for land on which Stone Belt's primary campus is located. In June 2023, the lease agreement was extended through November 2027. The lease agreement calls for a payment of \$1 per year. Accordingly, Stone Belt has recognized a contribution receivable based on the fair value of property to lease and the required payments. The contribution has been discounted at 4% as of June 30, 2023 and 2022 which approximates a risk-free interest rate. Stone Belt expects full realization on the contribution and has not recognized an allowance as of June 30, 2023 and 2022.



## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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The following is a summary of the contribution receivable as of June 30:

	<u>2023</u>	<u>2022</u>
Contribution receivable	\$ 373,250	\$ 106,250
Discount to present value	<u>(29,202)</u>	<u>(2,358)</u>
	<u>\$ 344,048</u>	<u>\$ 103,892</u>
Due in one year	\$ 81,125	\$ 75,000
Due in one to five years	<u>292,125</u>	<u>31,250</u>
	<u>\$ 373,250</u>	<u>\$ 106,250</u>

#### 4. ASSETS WHOSE USE IS LIMITED

Assets whose use is limited are reported at fair value and consist of the following as of June 30:

	<u>2023</u>	<u>2022</u>
Board designated funds	\$ 4,471,847	\$ 374,610
Held for reserve requirements	-0-	231,741
Donor restricted	<u>100,451</u>	<u>100,451</u>
	<u>\$ 4,572,298</u>	<u>\$ 706,802</u>
Cash and cash equivalents	\$ 1,122,908	\$ 250,140
Fixed income securities	2,940,673	-0-
Mutual funds	<u>508,717</u>	<u>456,662</u>
	<u>\$ 4,572,298</u>	<u>\$ 706,802</u>

Board designated funds relate primarily to capital improvements. As of June 30, 2022, investments of approximately \$232,000 are designated for reserve requirements to serve as collateral for a letter of credit related to workers compensation and employers' liability. As of June 30, 2023, the letter of credit related to the workers compensation and employers' liability did not require collateral for a reserve requirement. The remaining funds are donor restricted.

Investment return (loss) is comprised of the following for 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Interest and dividends, net of fees	\$ 1,775	\$ 1,084
Net unrealized loss on investments	(6,741)	(100,746)
Net realized gain on investments	<u>103,978</u>	<u>24,130</u>
Investment return (loss)	<u>\$ 99,012</u>	<u>\$ (75,532)</u>

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## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### 5. PROPERTY AND EQUIPMENT

The following is a summary of Stone Belt's property and equipment as of June 30:

	2023	2022
Land	\$ 461,431	\$ 461,431
Land improvements	2,783,089	2,783,089
Building and improvements	5,529,696	5,346,239
Furniture and equipment	3,678,624	3,476,567
Vehicles	657,774	658,044
Construction in progress	34,905	-0-
	13,145,519	12,725,370
Accumulated depreciation	(9,908,039)	(9,503,083)
	<u>\$ 3,237,480</u>	<u>\$ 3,222,287</u>

There were no significant outstanding commitments related to property and equipment as of June 30, 2023.

#### 6. LINE OF CREDIT

As of June 30, 2023 and 2022, a \$250,000 line of credit with Old National Bank was available with interest at prime plus .25%. The line of credit expires in November 2023 and is collateralized by substantially all of Stone Belt's assets. As of June 30, 2023 and 2022, there were no amounts outstanding on the line of credit.

#### 7. FAIR VALUE MEASUREMENTS

The framework for measuring fair value provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (level 1) and the lowest priority to unobservable inputs (level 3). The three levels of the fair value hierarchy are described as follows:

- Level 1: Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that Stone Belt has the ability to access.
- Level 2: Inputs to the valuation methodology include quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in inactive markets; inputs other than quoted prices that are observable for the asset or liability; inputs that are derived principally from or corroborated by observable market data by correlation or other means. If the asset or liability has a specified (contractual) term, the level 2 input must be observable for substantially the full term of the asset or liability.
- Level 3: Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

The asset or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques maximize the use of relevant observable inputs and minimize the use of unobservable inputs.

Following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used as of June 30, 2023 and 2022.

- *Mutual funds*: Valued at the daily closing price as reported by the fund. Mutual funds held by Stone Belt are open-end mutual funds that are registered with the Securities and Exchange Commission. These funds are required to publish their daily net asset value (NAV) and to transact at that price. The mutual funds held by Stone Belt are deemed to be actively traded.
- *US government obligations*: Valued using pricing models maximizing the use of observable inputs for similar securities.
- *Money market funds*: Valued based at the subscription and redemption activity at a \$1 stable NAV. However, on a daily basis the funds are valued at their daily NAV calculated using the amortized cost of the securities.

The following table sets forth by level, within the hierarchy, Stone Belt's assets and liabilities measured at fair value on a recurring basis as of June 30, 2023 and 2022 as follows:

	June 30, 2023			
	Total	Level 1	Level 2	Level 3
Assets				
Assets whose use is limited				
Fixed income securities				
US government obligations	\$ 2,940,673	\$ -0-	\$ 2,940,673	\$ -0-
Cash equivalents				
Money market funds	1,111,919	-0-	1,111,919	-0-
Mutual funds				
Intermediate-term bond	170,835	170,835	-0-	-0-
Large blend	130,584	130,584	-0-	-0-
Large growth	83,517	83,517	-0-	-0-
Short-term bond	66,325	66,325	-0-	-0-
Other	57,456	57,456	-0-	-0-
Total mutual funds	508,717	\$ 508,717	\$ 4,052,592	\$ -0-
Cash	10,989			
	\$ 4,572,298			

# STONE BELT ARC, INC.

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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	June 30, 2022			
	Total	Level 1	Level 2	Level 3
Assets				
Assets whose use is limited				
Mutual funds				
Intermediate-term bond	\$ 85,949	\$ 85,949	\$ -0-	\$ -0-
Large blend	131,850	131,850	-0-	-0-
Large growth	75,717	75,717	-0-	-0-
Large value	46,692	46,692	-0-	-0-
Short-term bond	70,369	70,369	-0-	-0-
Other	46,085	46,085	-0-	-0-
Total mutual funds	456,662	\$ 456,662	\$ -0-	\$ -0-
Cash	250,140			
	<u>\$ 706,802</u>			

Realized gains and losses are reported in the statements of activities and changes in net assets as a component of investment return (loss). Realized gains were recorded during 2023 and 2022 of approximately \$104,000 and \$24,000, respectively. Differences between market value and cost of investments are classified as unrealized gains or losses. Unrealized gains or losses are included in earnings for the period attributable to the change in unrealized gains relating to assets held as of June 30, 2023 and 2022 and are reported in the statements of activities and changes in net assets in investment return (loss). Unrealized losses of approximately \$7,000 and \$101,000 were recorded in 2023 and 2022, respectively.

Stone Belt holds investments which are exposed to various risks such as interest rate, market, and credit. Due to the level of risk associated with these securities and the level of uncertainty related to changes in the value, it is at least reasonably possible that changes in the various risk factors will occur in the near term that could materially affect the amounts reported in the accompanying financial statements.

### 8. ENDOWMENT FUND

Stone Belt's donor restricted net assets include an endowment fund which consists of various investment securities, most of which are traded on public markets. The endowment is made of donor restricted assets. As required by accounting principles generally accepted in the United States of America, net assets associated with the endowment fund are classified and reported based on the existence or absence of donor-imposed restrictions. The donor restricted endowment was approximately \$100,000 as of June 30, 2023 and 2022. The income from the endowment is available to be utilized by Stone Belt at its discretion. The investment return from the endowment is included in the statements of activities and changes in net assets as activity without donor restrictions.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### Interpretation of Relevant Law

Stone Belt's Board of Directors has determined the requirements of Indiana's version of the Uniform Prudent Management of Institutional Funds Act (UPMIFA) to center around the preservation of the fair value of the original investment as of the date of the asset transfers. Investments resulting from donations directing that they be invested in perpetuity are classified as donor restricted. The earnings generated by these investments are classified as without donor restriction upon their appropriation for expenditure by Stone Belt in a manner consistent with the standard of prudence prescribed by Indiana's version of the UPMIFA. Stone Belt considers the following factors in making a determination to appropriate or accumulate its endowment funds:

- (1) The duration and preservation of the fund
- (2) The purposes of Stone Belt and the donor-restricted endowment fund
- (3) General economic conditions
- (4) The possible effect of inflation and deflation
- (5) The expected total return from income and the appreciation of investments
- (6) Other resources of Stone Belt
- (7) The investment policies of Stone Belt

#### Return Objectives and Risk Parameters

Stone Belt has adopted investment and spending policies for endowment assets that attempt to provide a predictable stream of funding to programs supported by its endowment while seeking to maintain the purchasing power of the endowment assets. Endowment assets include those assets of donor-restricted funds that Stone Belt must hold in perpetuity. Under this policy, as approved by the Board of Directors, all endowment assets are invested in readily marketable securities. The purpose of the endowment fund is to facilitate donors' desires to make substantial long-term gifts to Stone Belt to develop a source of revenue to support the endeavors of Stone Belt and to support the activities of Stone Belt's clients.

#### Strategies Employed for Achieving Objectives

To satisfy its long-term rate of return objectives, Stone Belt relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yield (interest and dividends). Stone Belt targets a diversified asset allocation that places a greater emphasis on equity-based investments to achieve its long-term return objectives within prudent risk constraints.

#### Spending Policy and How Investment Objectives Relate

Annually a spending rate shall be determined by the Board of Directors after a recommendation from the finance committee. The allowable distribution from endowment funds, over and above fees and expenses allocable to the funds, shall be calculated annually by multiplying the current year's spending rate by the average ending market value of the endowment funds for each of the prior twenty quarters, using Stone Belt's calendar year ending June 30.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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#### Funds with Deficiencies

From time to time, the fair value of assets associated with individual donor restricted endowment funds may fall below the level that the donor or UPMIFA requires Stone Belt to retain as a fund of perpetual duration. Cumulative deficiencies of this nature are reported in net assets without donor restrictions. Stone Belt had no such deficiencies as of June 30, 2023 and 2022.

The following is a progression of the endowment assets for 2023 and 2022.

	2023	2022
Balance, beginning of year	\$ 100,451	\$ 100,451
Interest and dividends	2,221	1,272
Realized gain	5,398	5,102
Unrealized gain (loss)	1,842	(6,374)
Expenditures	(9,461)	-0-
Balance, end of year	<u>\$ 100,451</u>	<u>\$ 100,451</u>

#### **9. RETIREMENT PLAN**

Stone Belt maintains a 401k profit-sharing plan for eligible employees. Under the 401k retirement plan, Stone Belt makes a matching contribution of 100% up to 2% of the participant's contributions. Total retirement plan expense was approximately \$153,000 and \$166,000 for 2023 and 2022, respectively.

#### **10. LEASES**

Stone Belt recognizes right-of-use (ROU) assets and liabilities for leases with terms greater than 12 months or leases that contain a certain purchase option that is reasonably certain to be exercised. Leases are classified as either finance or operating leases. This classification dictates whether lease expense is recognized based on an effective interest method or on a straight-line basis over the term of the lease. Stone Belt had no financing leases as of June 30, 2023.

Stone Belt leases building space, equipment and vehicles under long-term agreements, which are classified as operating leases. Under the terms of the agreements, Stone Belt makes monthly payments based on agreed upon schedules. The lease agreements do not contain any material restrictive covenants. The leases have remaining term dates that range from 2024 through 2028.

Stone Belt's ROU assets and liabilities are recognized on the lease commencement date in an amount that represents the present value of future lease payments over the lease term. Stone Belt made a policy election to use a risk-free interest rate for the discounting and measurement of ROU assets and liabilities related to building space and equipment. The risk-free rate is permitted under a practical expedient available to not-for-profit entities which prescribes Stone Belt to use the risk-free rate so long as there is no implicit rate in the lease that is readily determinable. Stone Belt used the implicit rate for discounting and measurement of ROU assets and liabilities related to vehicles. Certain leases contracts contain non-lease components such as maintenance and utilities. Stone Belt has made a policy election to not separate

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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the lease and non-lease components, and thus recognizes a single lease component for all of its ROU assets and lease liabilities. The operating lease ROU asset also includes any lease payments made and excludes lease incentives, if any.

Short-term leases (leases with an initial term of 12 months or less or leases that are cancelable by the lessee and lessor without significant penalties) are not capitalized but are expensed on a straight-line basis over the lease term. The majority of Stone Belt's short-term leases relate to office equipment.

In evaluating contracts to determine if they qualify as a lease, Stone Belt considers factors such as if it has obtained substantially all of the rights to the underlying asset through exclusivity, if Stone Belt can direct the use of the asset by making decisions about how and for what purpose the asset will be used and if the lessor has substantive substitution rights. Furthermore, Stone Belt assesses whether it is reasonably certain to exercise options to extend or terminate a lease considering all relevant factors that create economic incentive to exercise such options, including asset, contract, market, and entity-based factors. These evaluations may require significant judgement.

The components of Stone Belt's lease cost for 2023 is as follows:

Operating lease cost	\$ 348,847
Gifts-in-kind rent cost	75,000
Short term lease cost	<u>93,838</u>
	<u>\$ 517,685</u>

Stone Belt's ROU assets and lease liabilities as of and for the year ended June 30, 2023 are as follows:

<b>Right-of-use assets</b>	
Operating lease assets	<u>\$ 760,953</u>
Deferred rent reduction included in ROU assets	<u>\$ 2,848</u>
<b>Lease liabilities</b>	
Operating lease liabilities, current	\$ 311,736
Operating lease liabilities, noncurrent	<u>452,065</u>
Total operating lease liabilities	<u>\$ 763,801</u>

Cash paid for amounts included in measurement of lease liabilities:

Operating cash flows from operating leases	\$ 349,752
Right-of-use assets obtained in exchange for new operating lease liabilities	\$ 662,483
Weighted-average remaining lease term - operating leases	3.49 years
Weighted average discount rate - operating leases	6.02%

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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Future payments of lease liabilities are as follows:

Year Ending June 30,	
2024	\$ 325,227
2025	179,166
2026	154,993
2027	153,985
2028	<u>50,398</u>
Total lease payments	863,769
Less interest	<u>(99,968)</u>
	<u>\$ 763,801</u>

The leases include escalating lease payments that, under accounting principles generally accepted in the United States of America, are to be recognized on a straight-line basis. Under ASC 842, the ROU asset was reduced by approximately \$3,000 for deferred rent. Prior to the adoption of ASC 842, Stone Belt recorded a deferred rent liability for the difference between amounts paid and the amounts expensed under the leases as of June 30, 2022.

Total rent and lease expense was approximately \$533,000 in 2022. As of June 30, 2022, Stone Belt had operating lease agreements for building space, equipment and vehicles that expire at various times through 2025. Minimum lease payments required under the terms of the operating leases for the years succeeding June 30, 2022 prior to the adoption of ASC 842 were as follows:

Year Ending June 30,	
2023	\$ 225,461
2024	164,268
2025	<u>26,436</u>
	<u>\$ 416,165</u>

#### 11. LIQUIDITY AND AVAILABILITY OF RESOURCES

As of June 30, 2023, Stone Belt had approximately \$3,632,000 of financial assets available within one year of the statement of financial position date to meet cash needs for general expenditure consisting of cash of \$2,607,000 and contract receivables of \$1,025,000. None of the financial assets are subject to donor or other contractual restrictions that make them unavailable for general expenditure within one year of the statement of financial position date. Contract and grant receivables are subject to implied time restrictions, but are expected to be collected within one year. Stone Belt's policy is to structure its financial assets to be available as its general expenditures, liabilities, and other obligations come due. In addition, as part of its liquidity management, Stone Belt invests cash in excess of daily requirements in various investments, including mutual funds.

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# STONE BELT ARC, INC.

## NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

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As of June 30, 2022, Stone Belt had approximately \$8,452,000 of financial assets available within one year of the statement of financial position date to meet cash needs for general expenditure consisting of cash of \$7,380,000 and contract receivables of \$1,072,000.

As of June 30, 2023 and 2022, Stone Belt had approximately \$4,472,000 and \$375,000, respectively, in long-term investments that were without donor restriction but designated by the board for capital improvements. While there is no intent to liquidate these investments, they are available to Stone Belt with board approval. Furthermore, Stone Belt also had \$250,000 available on its line of credit as of June 30, 2023 and 2022 which is available through November 2023 when the line of credit expires.

### 12. CONCENTRATION OF CREDIT RISK

Major customers/grantors are those that individually account for more than 10% of Stone Belt's total support and revenue. For 2023 and 2022, Medicaid programs (primarily residential and day services) accounted for 87% and 78% of the total support and revenue for 2023 and 2022, respectively. Stone Belt provides services to individuals and companies which are billed in arrears at least monthly. The majority of individual services are provided under grant contracts or provider agreements with state agencies. Companies are provided credit in the normal course of business without collateral. Accounts receivable by payor was as follows as of June 30:

	<u>2023</u>	<u>2022</u>
Medicaid	59%	56%
Government	24%	30%
Other	17%	14%
	<u>100%</u>	<u>100%</u>

### 13. COMMITMENTS AND CONTINGENCIES

Stone Belt has a standby letter of credit for \$225,000 as of June 30, 2023 and 2022, as a requirement to the workers compensation and employers liability insurance policy. There were no borrowings against this letter of credit as of June 30, 2023 and 2022. As of June 30, 2022, the letter of credit is collateralized by funds held in a separate account reported in assets whose use is limited in the statement of financial position. As of June 30, 2023, the requirements to collateralize the letter of credit were removed after a new letter of credit was obtained.

Certain grants and contracts require the fulfillment of certain conditions as set forth in the instruments. Failure to fulfill the conditions could result in the return of the funds to grantors. Although that is a possibility, Stone Belt deems the contingency remote, since by accepting the funds and their terms it has accommodated the objectives of the organization to the provisions of the grant or contract.

Stone Belt is involved in various legal proceedings and litigation arising in the ordinary course of business. Although the eventual outcome of these matters is not presently determinable, in the opinion of Stone Belt's management, the resolution of such proceedings and litigation will not have a material adverse effect on the financial position, results of operations or cash flows of Stone Belt.

## STONE BELT ARC, INC.

### NOTES TO FINANCIAL STATEMENTS JUNE 30, 2023 AND 2022

#### 14. FUNCTIONAL EXPENSES

Stone Belt provides a full range of services to individuals with disabilities. The costs of providing various programs and support activities have been summarized on a natural basis in the statements of activities and changes in net assets and on functional basis below. Certain costs such as salaries, wages and benefits have been allocated among program services, general and administrative, and fundraising categories based on actual direct expenditures and cost allocations based on estimates of time spent by Stone Belt's personnel. Other costs such as rents and leases, utilities and telephone and depreciation have been allocated among program services, general and administrative, and fundraising categories based on actual direct expenditures and cost allocations based on estimates of space utilized by these functional expense categories. Allocations have been applied to all functional categories reported below. Although the methods used were appropriate, alternative methods may provide different results.

Expenses related to providing these services for 2023 and 2022 were as follows:

	2023			Total
	Program Services	General and Administrative	Fundraising	
Salaries, wages and benefits	\$ 16,426,987	\$ 1,806,362	\$ 124,387	\$ 18,357,736
Professional fees	127,349	76,692	398	204,439
Purchased services	143,609	215,705	6,089	365,403
Supplies	578,309	77,016	64,809	720,134
Rent and leases	475,671	32,014	10,000	517,685
Utilities and telephone	364,817	217,600	1,070	583,487
Depreciation	234,759	167,756	766	403,281
Repairs and maintenance	173,097	94,221	-0-	267,318
Dues and subscriptions	10,231	307,062	4,654	321,947
Insurance	155,148	34,096	-0-	189,244
Vehicle	215,679	10,094	218	225,991
Travel and training	167,771	54,932	2,763	225,466
Provider tax	472,785	-0-	-0-	472,785
Interest	-0-	-0-	-0-	-0-
Other	4,136	32,823	-0-	36,959
Total	\$ 19,550,348	\$ 3,126,373	\$ 215,154	\$ 22,891,875

**STONE BELT ARC, INC.**

NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2023 AND 2022

	2022			Total
	Program Services	General and Administrative	Fundraising	
Salaries, wages and benefits	\$ 17,964,789	\$ 1,713,794	\$ 111,353	\$ 19,789,936
Professional fees	146,501	70,570	-0-	217,071
Purchased services	134,713	180,288	1,148	316,149
Supplies	521,439	104,018	34,062	659,519
Rent and leases	466,744	62,357	3,750	532,851
Utilities and telephone	414,382	143,105	1,369	558,856
Depreciation	221,564	142,135	796	364,495
Repairs and maintenance	186,630	81,658	9	268,297
Dues and subscriptions	12,644	234,682	4,869	252,195
Insurance	140,208	19,173	-0-	159,381
Vehicle	242,847	9,189	89	252,125
Travel and training	148,935	53,100	-0-	202,035
Provider tax	441,721	-0-	-0-	441,721
Interest	37,332	-0-	-0-	37,332
Other	64,873	50,340	-0-	115,213
Total	\$ 21,145,322	\$ 2,864,409	\$ 157,445	\$ 24,167,176

**15. FEDERAL, STATE AND LOCAL AWARDS**

*Uniform Compliance Guidelines for Examination of Entities Receiving Financial Assistance from Government Sources*, issued by the Indiana State Board of Accounts, requires Indiana not-for-profit entities to disclose federal, state and local awards expended during the entities' annual reporting period. During 2023, and 2022, Stone Belt expended the following federal, state, and local awards.

	2023	2022
Federal		
Home and Community Based Services Grant	\$ -0-	\$ 912,500
Direct Service Workforce Investment Grant	299,999	-0-
Total federal	299,999	912,500
Local		
Monroe County	560,039	546,660
United Way	31,079	34,965
Other	110,000	24,382
Total local	701,118	606,007
	\$ 1,001,117	\$ 1,518,507

**STONE BELT ARC, INC.**

NOTES TO FINANCIAL STATEMENTS  
JUNE 30, 2023 AND 2022

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Stone Belt received COVID-19 federal grant funds through the Department of Treasury under Federal Assistance Listing Number #21.019 passed through the State of Indiana Family and Social Services Administration (FSSA). In 2023 and 2022 these funds were for the stabilization of the workforce. FSSA considers Stone Belt a beneficiary for these grant funds rather than sub-recipient. As a beneficiary, these funds are excluded from Stone Belt's determination of federal expenditures under the Uniform Guidance requirements.